

Raising a TATF or Bulk Engagement Contract Request - Oleo User Guide

This document will provide you with step-by-step guidance on how to:

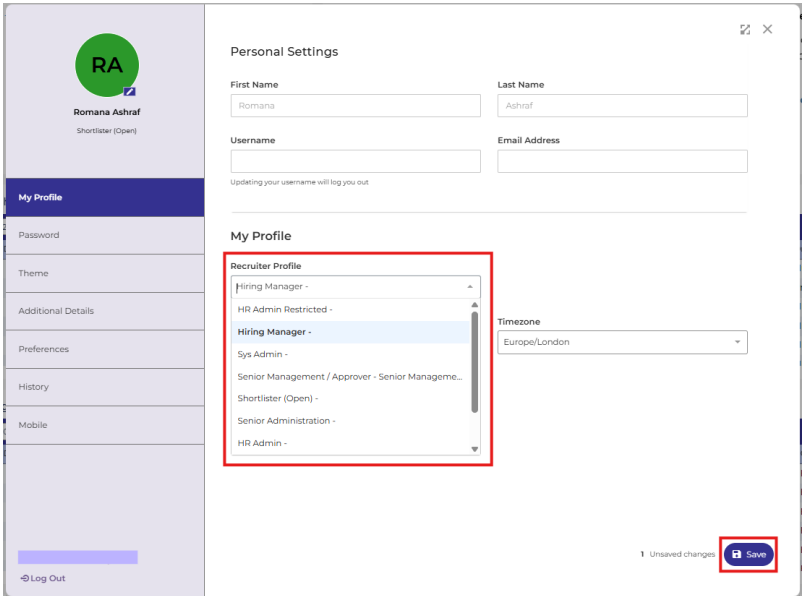
- [Create a TATF or bulk engagement contract request including copying requests](#)
- [Reviewing a request saved as “Draft” and releasing for approval](#)
- [Give other users access to an Opportunity](#)

Throughout this document, the words ‘request’ and ‘Opportunity’ are used interchangeably.

Important Note: The TATF/Other Bulk Engagements template should be used for raising new and additional contract requests for bulk engagements including TATFs, Demonstrators, Student Ambassadors, Invigilators, SU casuals, CBME Tutors etc.

Contract variations for TATFs and other Bulk engagements must also be submitted using the same TATF/Other Bulk Engagements template.

For temporary part year contracts (different to bulk engagements, which include set hours and casual worker agreements) use the “Temporary Contract” template and follow the [“Raising a Temporary Contract Request”](#) guidance.

Accessing Oleo	
Step/Action	Example/Screenshot
<p>To access Oleo, use this link: https://qmul-jobs.tal.net/ and click on “Log in with single sign on” to log into the system.</p> <p>Note: You must be logged in with a “Hiring Manager” or “Faculty Hub” profile to be able to create an Opportunity.</p> <p>When you log into Oleo, you will be presented with your homepage known as your Dashboard.</p> <p>To switch the profile, you are on:</p> <ol style="list-style-type: none"> i. Select your name from the left-hand menu. ii. Under “My Profile” select the profile you wish to switch to in the “Recruiter Profile” field. iii. Select “Save”. <p>The profile will now switch and load the relevant dashboard.</p>	

Creating a TATF or bulk engagement contract request

- 1) Select the **“Create Opportunity”** button in the **“Quick Links”** box on your Dashboard which will load the **“Create”** screen.

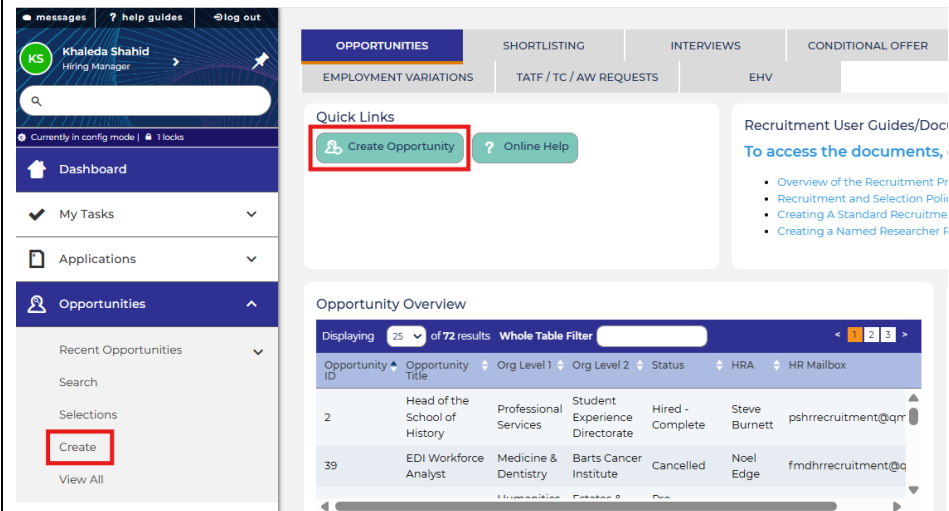
Note: You can also select **“Create”** under the **“Opportunities”** section in the left-hand menu.

Quick Tip: If you are on a screen other than the **“Opportunities”** tab on your dashboard, enter the word **“create”** in the search box and then click on the result returned. This will launch the Opportunity Form.

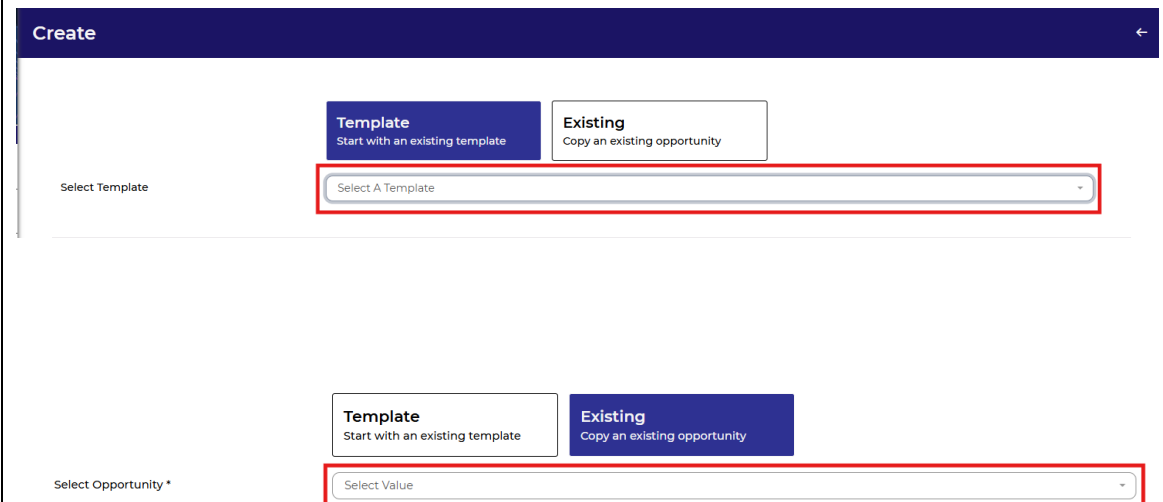
- 2) On the Create screen, choose either to:
 - i. Start with an existing template by selecting the **“Template”** tile or
 - ii. Copy an existing Opportunity by selecting the **“Existing”** tile.

If you select the **“Template”** tile, you will need to select the **TATF/Other Bulk Engagements** template.

If you select the **“Existing”** tile, you will need to enter the Opportunity number you wish to copy in the **“Select Opportunity”** field. This will load a copy of your previously submitted request. You can then proceed to editing the form before submitting.



Opportunity ID	Opportunity Title	Org Level 1	Org Level 2	Status	HRA	HR Mailbox
2	Head of the School of History	Professional Services	Student Experience Directorate	Hired - Complete	Steve Burnett	pshrrecruitment@qm
39	EDI Workforce Analyst	Medicine & Dentistry	Barts Cancer Institute	Cancelled	Noel Edge	fmdhrrecruitment@q



Template
Start with an existing template

Existing
Copy an existing opportunity

Select Template

Select A Template

Template
Start with an existing template

Existing
Copy an existing opportunity

Select Opportunity *

Select Value

- 3) Enter the “**Job Title**” and “**Proposed Closing Date**”. The proposed closing date does not have an impact on the request itself but must be at least 3 months after the creation date. “**Creation date**” is auto populated and should be left as is.

Note: The Job Title should be appropriate to the position you are recruiting into. Once the form is submitted, you will not be able to amend the title.

- 4) Complete the **Position Details**. Mandatory fields are marked with an asterisk (*). The question mark bubbles provide extra help if you hover over them.

- 5) Once you are happy with the completed form, click “**Create**”. If you have missed any mandatory fields and wish to return to the position, click “**Save as Draft**”, and follow the “[reviewing and releasing a saved draft](#)” guidance below. Otherwise, continue to Step 6.

- 6) You will now see the Opportunity ID, Title and Status. Click the green “**Request Approval**” button. Once selected, the status will change to “**Awaiting Tier 1 Approval**” and the Tier 1 Approver will automatically be sent an approval request email. You will also receive an email to confirm that the Opportunity has been submitted for approval.

Job Title *

Creation Date (DD/MM/YYYY)

Proposed Closing Date (DD/MM/YYYY) *

Position Details

Please submit separate requests for cohorts of different semesters e.g. submit one request for cohorts in Semester A and a separate request for cohorts in Semester B. Unless the contract spans across all Semesters with no break.

Job Type *

Request Type *

Planned Number of Hires (Total Headcount) *

Location(s) *

Main Site *

Organisation Level 1 *

Organisation Level 2 *

Organisation Level 3 *

Duration *

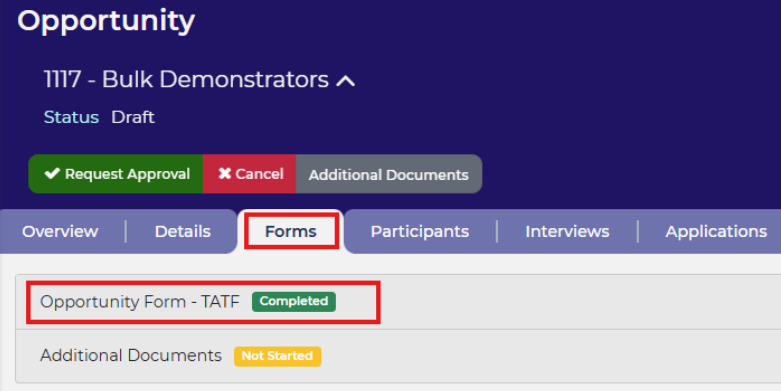
FTC Reason *

Opportunity

1117 - Bulk Demonstrators ^

Status Draft

Note: Once you have submitted the form for approval, you will **not** be able to make any changes. To review the form before clicking the “**Request Approval**” button, go to the “**Forms**” tab and click on the first row. You will be able to make changes to the form if you need. Ensure you click “**Submit**” at the bottom of the form to save the changes and then click “**Request Approval**”.



The screenshot shows the Oleeo interface for an opportunity titled "1117 - Bulk Demonstrators" with a status of "Draft". At the top, there are three buttons: "Request Approval" (green with a checkmark), "Cancel" (red with an X), and "Additional Documents" (grey). Below these is a navigation bar with tabs for "Overview", "Details", "Forms" (highlighted with a red box), "Participants", "Interviews", and "Applications". Under the "Forms" tab, there is a table with two rows: "Opportunity Form - TATF" with a "Completed" status (green box) and "Additional Documents" with a "Not Started" status (yellow box). Both the "Forms" tab and the "Opportunity Form - TATF" row are highlighted with red boxes.

On Oleeo, there is a 2 Tier approval system. The approver workflows are as follows:

- **Research Grant funded** requests will be sent to the School/Institute Manager (Tier 1) and then JRMO (Tier 2),
- **Queen Mary funded** requests will be sent to Finance (Tier 1) and then Faculty Director of Operations (Tier 2).

Once the post has been fully approved, it will go to HR (tatfandtempenagements@qmul.ac.uk) to review and action.

Reviewing a request saved as “Draft” and releasing for approval

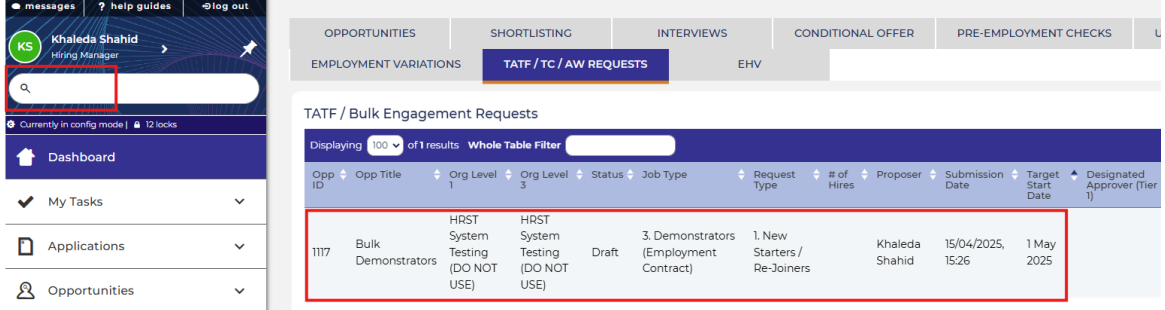
Step/Action

- 1) Locate your draft Opportunity. To do so, you can either:
 - i. Use your **Dashboard**. Go to the “**TATF/Bulk Engagement Requests**” widget on the “**TATF/TC/AW Requests**” tab and double click on the draft Opportunity you wish to review and edit. **OR**
 - ii. Search in the left-hand menu typing in the Opportunity Title or ID and then single selecting the Opportunity in the results returned.

Quick pro tip: If you know the Opportunity ID, you can go straight to the Opportunity using the prefix “v:” followed by the ID. For example, if the Opportunity ID is “1117” enter “v:1117” and press enter.

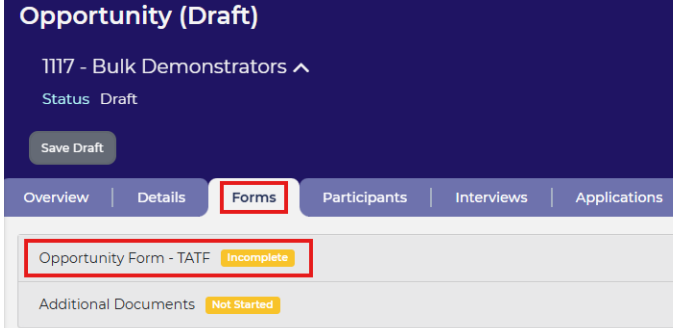
- 2) Once you have landed on the Opportunity page, select the “**Forms**” tab and click on the first row.
- 3) Review the form and make the necessary changes.
- 4) Ensure you click “**Submit**” at the bottom of the form to save the changes.
- 5) To move the Opportunity out of draft and start the approval process, click the grey “**Save Draft**” button. The status will remain as “**Draft**” but you will be presented with the “**Request Approval**” button.
- 6) Click the green “**Request Approval**” button. Once selected, the status will change to “**Awaiting Tier 1 Approval**” and the Tier 1 Approver will automatically be sent an approval request email.

Example/Screenshot

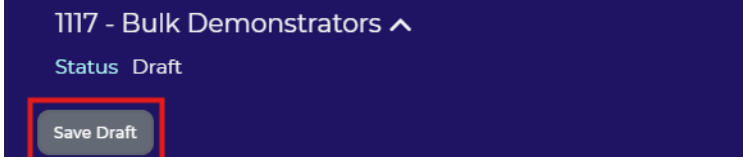


The screenshot shows the 'TATF / Bulk Engagement Requests' dashboard. A table lists draft requests. The following table represents the data shown in the screenshot:

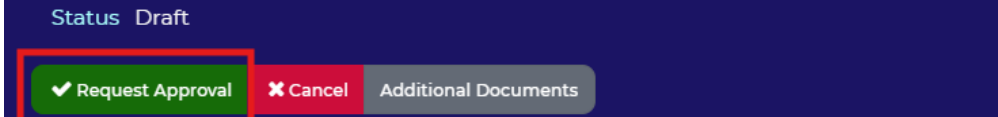
Opp ID	Opp Title	Org Level 1	Org Level 3	Status	Job Type	Request Type	# of Hires	Proposer	Submission Date	Target Start Date	Designated Approver (Tier 1)
1117	Bulk Demonstrators	HRST System Testing (DO NOT USE)	HRST System Testing (DO NOT USE)	Draft	3. Demonstrators (Employment Contract)	1. New Starters / Re-Joiners		Khaleda Shahid	15/04/2025, 15/26	1 May 2025	



The screenshot shows the 'Opportunity (Draft)' page for ID 1117. The 'Forms' tab is selected, and a table shows the 'Opportunity Form - TATF' with a status of 'Incomplete'.



The screenshot shows the 'Opportunity (Draft)' page for ID 1117. The 'Save Draft' button is highlighted with a red box.



The screenshot shows the 'Opportunity (Draft)' page for ID 1117. The 'Request Approval' button is highlighted with a red box.

Giving access to others

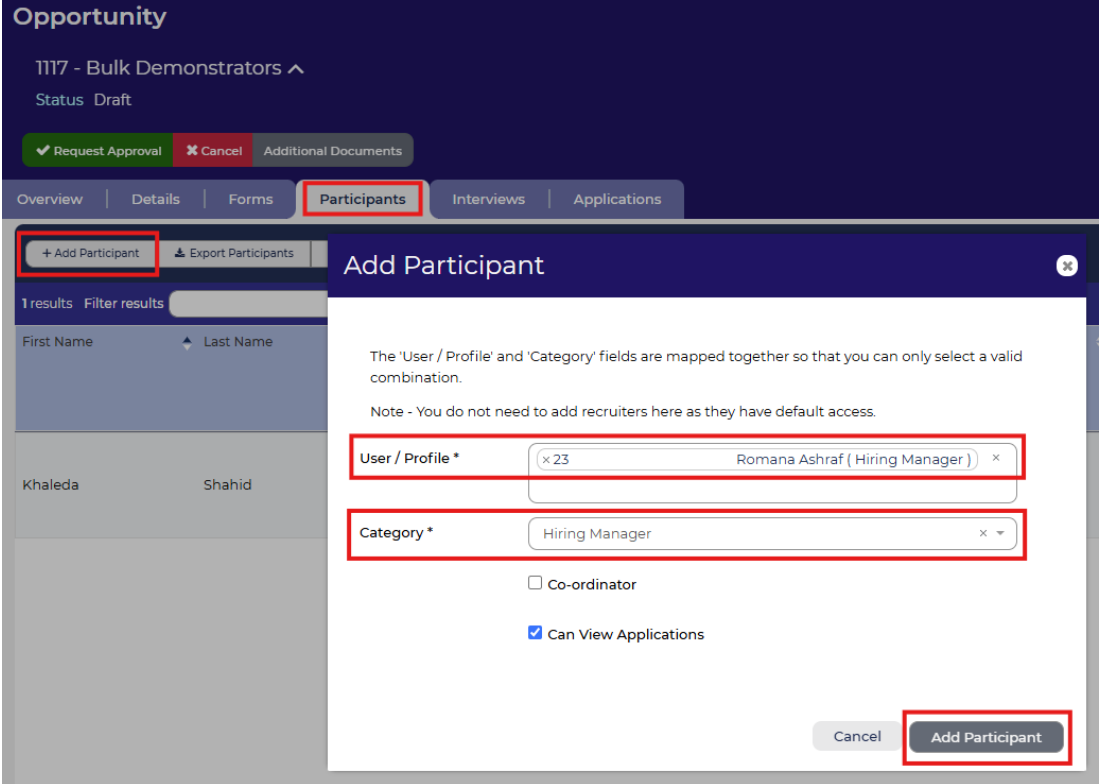
Step/Action

To give others access to the Opportunity and Application, you will need to add them to the “**Participants**” tab.

- 1) On the Opportunity, under the “**Participants**” tab, select “**Add Participant**”.
- 2) Search for the individual you wish to add in the “**User/Profile**” field and ensure that the “**Category**” matches. It should be a Hiring Manager profile.
- 3) Tick “**Can View Applications**”.
- 4) Select “**Add Participant**”.

If an individual does not have the required profile, they will need to contact the [IT Service Desk](#) to request it.

Example/Screenshot



The screenshot displays the 'Opportunity' page for '1117 - Bulk Demonstrators'. The 'Participants' tab is active, and the '+ Add Participant' button is highlighted with a red box. The 'Add Participant' modal is open, showing a search for 'Romana Ashraf (Hiring Manager)' in the 'User / Profile' field and 'Hiring Manager' in the 'Category' field. The 'Can View Applications' checkbox is checked. The 'Add Participant' button at the bottom right of the modal is also highlighted with a red box.