Raising an Agency Worker Request - Oleeo User Guide

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

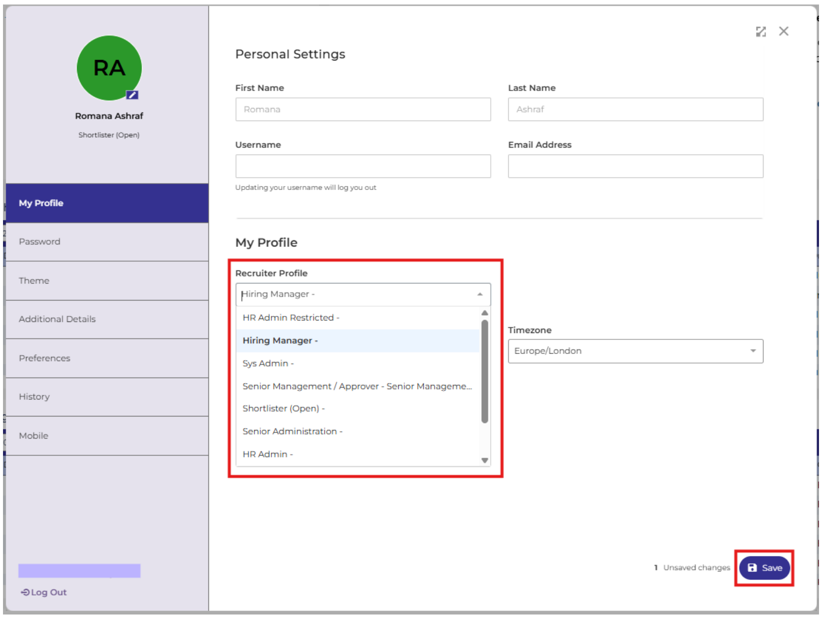
- [Create an agency worker contract request including copying requests]
- [Reviewing a request saved as “Draft” and releasing for approval]
- [Give other users access to an Opportunity]

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

Important Note: The Agency Worker template is to be used to seek approvals to employ agency staff only. The HR Recruitment/Operations Admin Teams will neither be notified of, nor will they be processing the request. This type of request must ***not*** be used as a mechanism to avoid following the standard recruitment process to make a fixed term appointment.

Managers using Agency Staff must comply with the legal duties set out in the Agency Workers Regulations. Some of these apply from the first day of the assignment and others apply after the worker has completed a twelve-week qualifying period. For more information on hiring and managing Agency staff, visit the Managing Agency Staff HR webpage.

Accessing Oleeo

Step/Action	Example/Screenshot
To access Oleeo, use this link: https://qmul-jobs.tal.net/ and click on “*Log in with single sign on*” to log into the system. **Note**: You must be logged in with a “**Hiring Manager**” or “**Faculty Hub**” profile to be able to create an Opportunity. When you log into Oleeo, you will be presented with your homepage known as your **Dashboard**. To switch the profile you are on: 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**”. The profile will now switch and load the relevant dashboard.	

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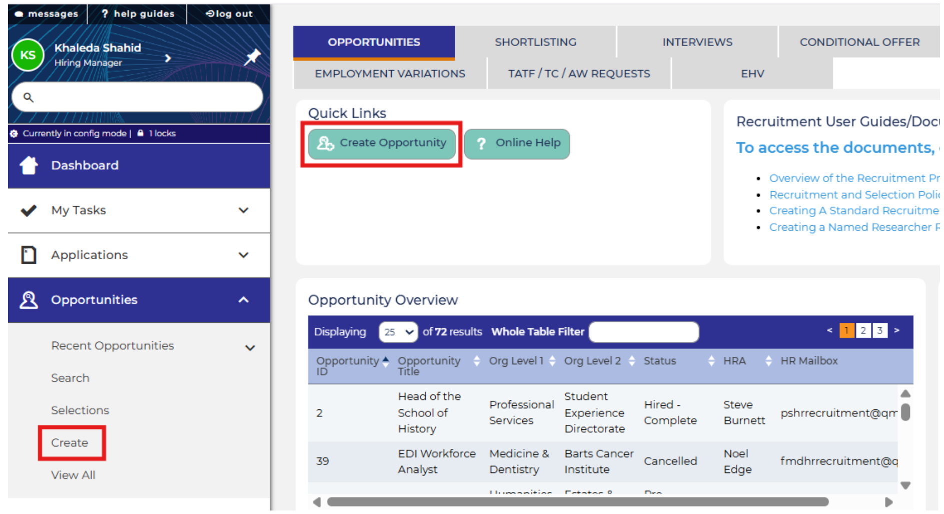
Queen Mary University of London

Creating an Agency Worker request

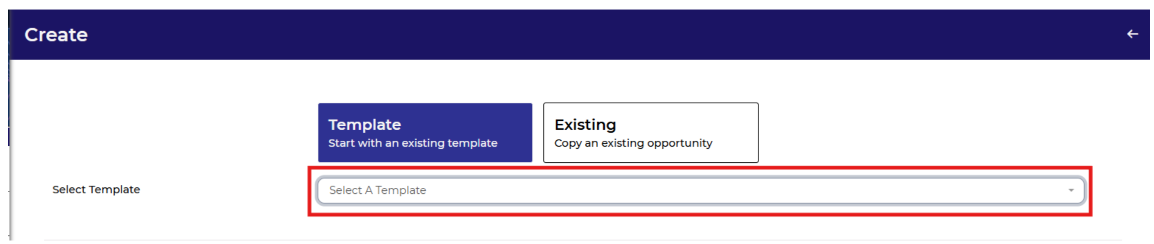
1) Select the "**Create Opportunity**" button in the "*Quick Links*" box on your Dashboard which will load the "Create" screen.

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

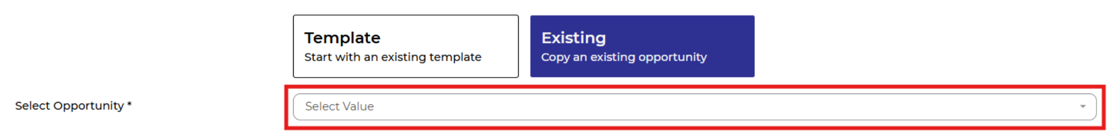
Quick Tip: If you are on a screen other than the "***Opportunities***" tab on your dashboard, enter the word "*create*" in the search box in the left-hand menu and then click on the option that appears. This will launch the Opportunity Form for you to complete and create.



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 **Agency Worker** 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.

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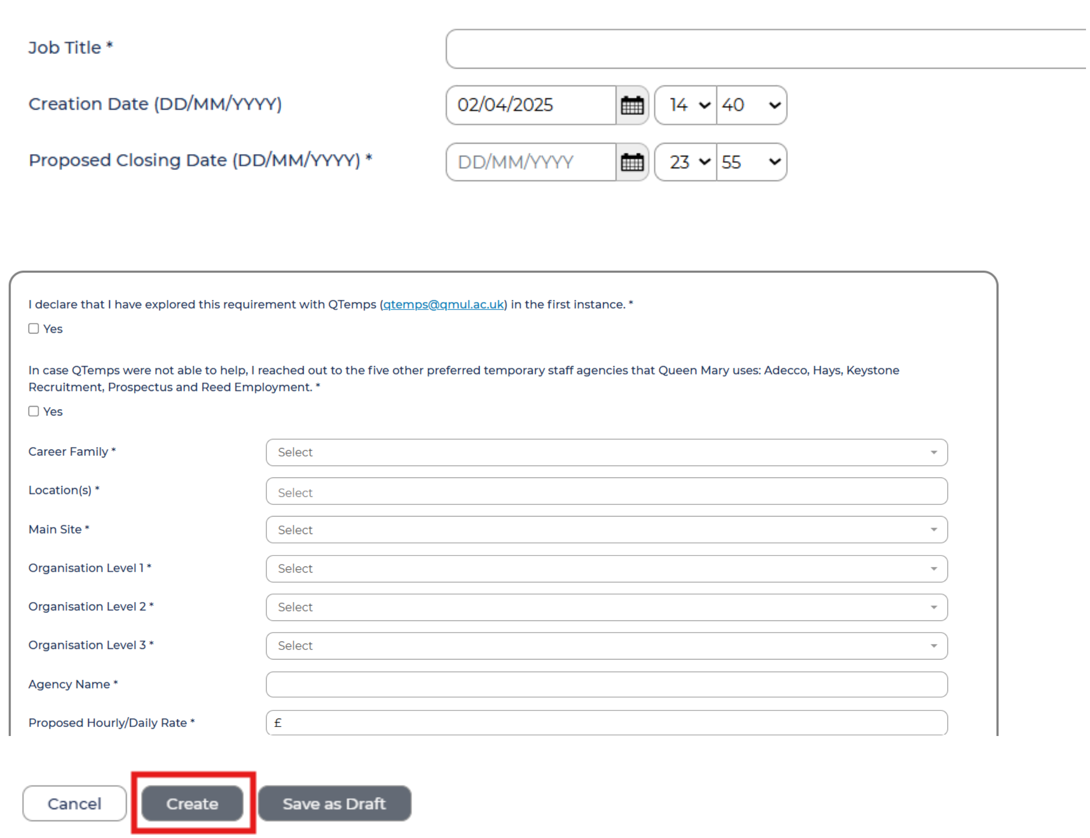
3) Enter the "**Job Title**" and "**Proposed Closing Date**". The proposed closing date does not have an impact on the request itself but must be at least 3 months after the creation date.
"**Creation date**" is auto populated and should be left as is.

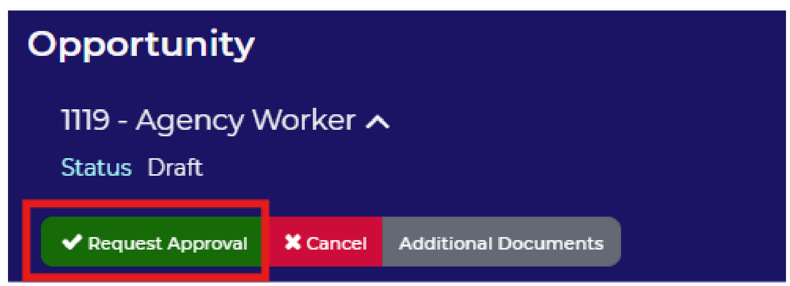
Note: The Job Title should be appropriate to the position you are recruiting into. Once the form is submitted you will not be able to amend the title.

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.



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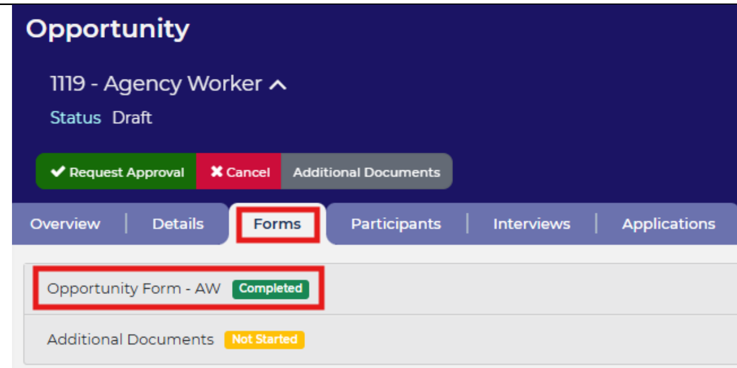
Note: Once you have submitted the form for approval, you will ***not*** be able to make any changes. To review the form before clicking the "**Request Approval**" button, go to the "***Forms***" tab and click on the first row. You will be able to make changes to the form if you need. Ensure you click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



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, you (Hiring Manager) will be notified that the request has been approved and can proceed with onboarding the agency worker.

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** by scrolling down on the "***TATF/TC/AW Requests***" tab to the "**Agency Worker Requests**" widget 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 click on the Opportunity in the results returned.

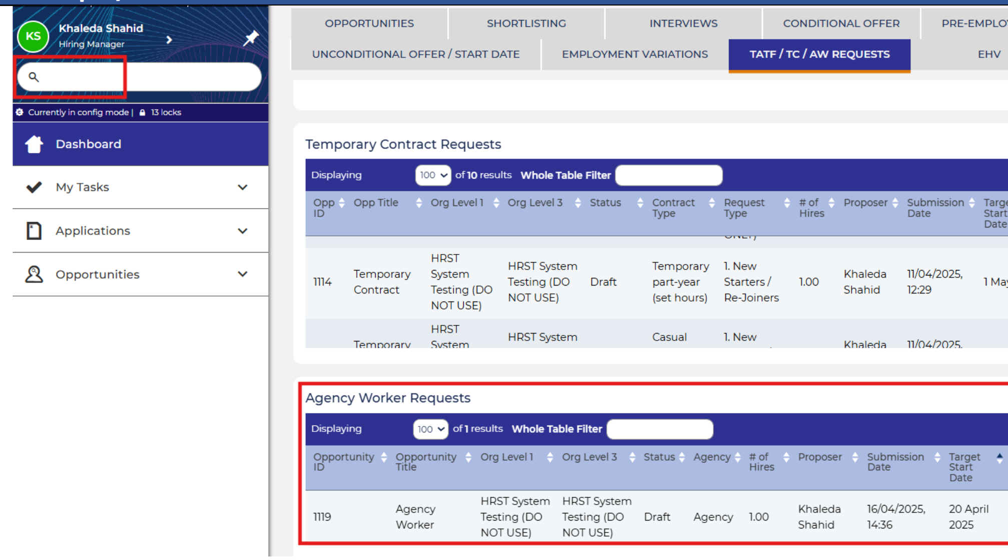
Quick pro tip: If you know the Opportunity ID, you can go straight to the Opportunity using the prefix "**v:**" followed by the ID. For example, if the Opportunity ID is "*1119*" enter "*v:1119*" in the search bar and press enter.

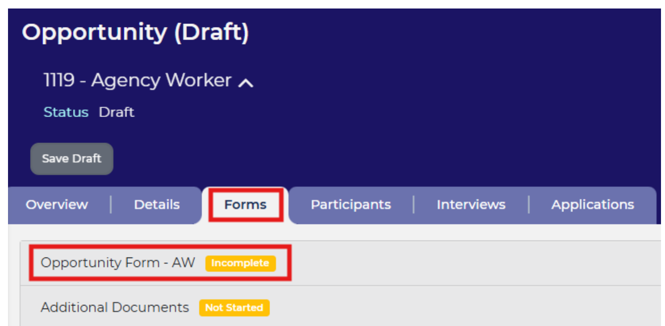
2) Once you have landed on the Opportunity page, select the "***Forms***" tab and click on the first row.
3) Review the form and make the necessary changes.
4) Ensure you click "**Submit**" at the bottom of the form to save the changes.

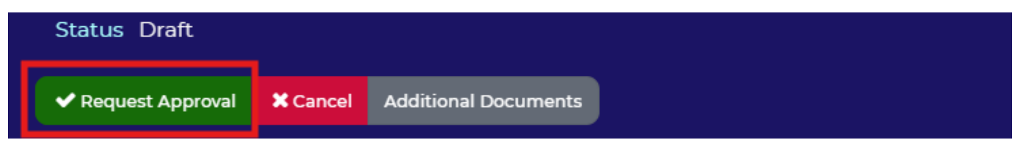
5) To take the Opportunity out of draft, ready for approval, click the grey "**Save Draft**" button. The status will remain as "**Draft**" but you will be presented with the "**Request Approval**" button.

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







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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