

Raising and Managing a Contract Variation Request - Oleeo User Guide

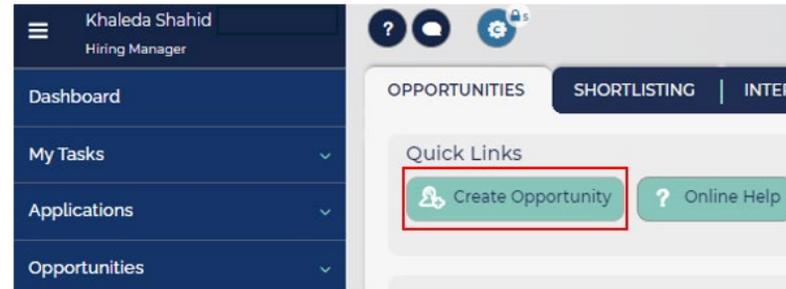
This document will provide you with step-by-step guidance on how to:

- [Raise a contract variation request](#)
- [Activate a draft contract variation request](#)
- [Search for a contract variation request](#)
- [Re-submit a rejected contract variation request](#)
- [Delete a contract variation request raised in error](#)

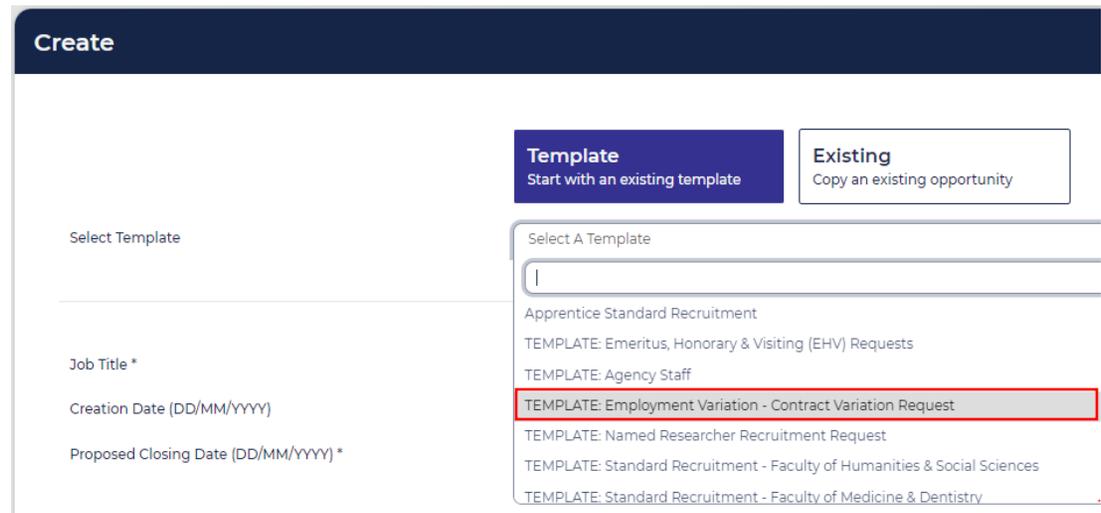
Throughout this document, the terms application, employee and request are used interchangeably.

Accessing Oleeo	
Step/Action	Example/Screenshot
<p>To access Oleeo, use this link: https://qmul-jobs.tal.net/ and click on “<i>Log in with single sign on</i>” to log into the system. (You are not required to enter any log in details).</p> <p>Note: You must use the “Hiring Manager” profile to raise a Contract Variation Request.</p> <p>When you log into Oleeo, you will be presented with your homepage known as your Dashboard.</p>	
Raising a Contract Variation Request	
<p>You can raise a contract variation request (CVR) for the following scenarios:</p> <ul style="list-style-type: none"> • Acting Up • Additional Responsibility • Additional Contract (6 months or less) • Change of Hours • Extension of Fixed term/Temporary Contract • Fixed term/Temporary to Permanent Contract • Job Regrade / Promotion / Transfer / Demotion • Royalty Payments • Secondment 	

1) Under your Hiring Manager profile, select “**Create Opportunity**”.



2) Select the “**Employment Variation - Contract Variation Request**” template from the drop-down menu.



3) Complete the Form.

- **Job Title:** Enter the initials of the employee followed by type of request being raised for the individual. For example, “JD - Contract Extension Request”.
- **Creation Date:** Leave this as it is.
- **Proposed Closing Date:** Input a date at least 3 months in the future.



The screenshot shows the form fields for 'Job Title *', 'Creation Date (DD/MM/YYYY)', and 'Proposed Closing Date (DD/MM/YYYY) *'. The 'Job Title' field contains 'JD - Contract Extension Request'. The 'Creation Date' field contains '29/05/2024'. The 'Proposed Closing Date' field contains '31/08/2024'. All three fields are highlighted with a red box.

- **Funding Source:** Select as appropriate. This is a multi-select field and will determine who approves the request. If there is more than one source of funding, i.e. QM and Grant funding, you will need to obtain offline approval for the second source of funding from the appropriate approvers and attach it to the applicant page, under the **Forms** tab, **Flags Form**.

4) You can choose to click:

- **Save as Draft:** If you do not want to progress the request just yet. You can come back to this request later. See the “[Activating a Draft request](#)” section on how to take the request out of draft.
- **Create:** To move forward with the request.

5) Select the green “**Activate**” button.

The opportunity status will now show as “**Active**”.

You have now created an **Opportunity** which acts only as a placeholder for you to create your contract variation request for the employee.

Please choose the funding source with care as this will determine the approvers. Once you have submitted your request this cannot be changed. For e.g., choosing 'Research grant' will send the request to School/Institute Manager (Tier 1) and JRMO (Tier 2), whilst choosing 'Queen Mary' will send the request to Finance (Tier 1) and FDO (Tier 2).

Funding Source *

Cancel Create Save as Draft

Opportunity

457 - JD - Contract Extension Request ^

Status Draft

✓ Activate Additional Documents

Overview Details Forms Participants Interviews Applications

Summary

Current Status: Draft

457 - JD - Contract Extension Request ^

Status Active

Additional Documents

Overview Details Forms Participants Interviews Applications

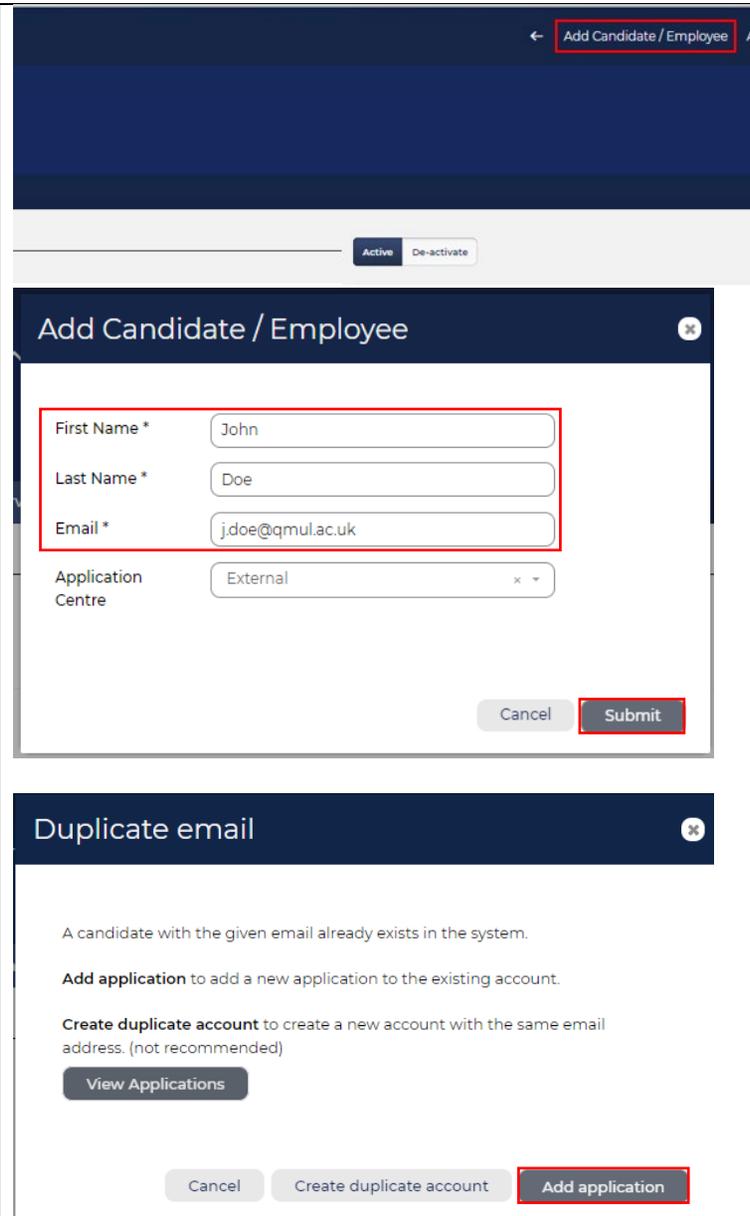
Summary

Current Status: Active

6) Click “**Add Candidate / Employee**” at the top right corner.

7) Enter the **First Name**, **Last Name** and **Email Address** of the employee you are making the request for and click “**Submit**”.

8) If multiple applications have been submitted previously for/by the employee, the system will present a warning. Continue by clicking “**Add Application**”.



The screenshot shows a web interface for adding a candidate or employee. At the top right, there is a button labeled "Add Candidate / Employee". Below this, there are "Active" and "De-activate" buttons. The main form is titled "Add Candidate / Employee" and contains the following fields:

- First Name *: John
- Last Name *: Doe
- Email *: j.doe@qmul.ac.uk
- Application Centre: External

At the bottom of the form are "Cancel" and "Submit" buttons. Below the form is a "Duplicate email" dialog box with the following text:

A candidate with the given email already exists in the system.

Add application to add a new application to the existing account.

Create duplicate account to create a new account with the same email address. (not recommended)

There is a "View Applications" button and at the bottom are "Cancel", "Create duplicate account", and "Add application" buttons.

Now you are ready to complete the contract variation request (CVR) form.

- 9) Click “**Request Form**”, complete the form and “**Submit**”.

There is no option to save the request form as a draft.

Tip: In the form, select the **Reason** for the CVR and take note of what is required. If you do not have everything to hand, take note of the **Applicant ID** (in this case 2299) to return to and complete the request form once you have all the details and documents to hand.

Note: **Hiring Manager** on the request form is the name of the individual raising and managing the CVR on Oleeo. They will receive information about the status of the request and any action that needs to be taken.

Note: Once you have submitted the form, no edits can be made and will NOT show for the Approver.

- 10) Upon submission of the form, the application status will change to “**EV - Awaiting Tier 1 Approval**”.



The screenshot shows the 'Application Summary' page for application 2299 - John Doe. The status is 'Manually Added, Application Not Complete'. A green button labeled 'Request Form' is visible. The page has tabs for Summary, Notes, Forms (0), and Access.



The screenshot shows the 'Application Summary' page for application 2299 - John Doe. The status has updated to 'EV - Awaiting Tier 1 Approval'. The page has tabs for Summary, Notes, Forms (0), and Access.

The form will now go through the standard two-tier approval process. You will receive a notification when the request is approved at final tier and after the HR Operations Team have completed the process on their end.

Once approved and with the HR Operations Team, the relevant paperwork will be drawn-up and sent to the employee as required via email.

Activating a “Draft” request

If you have clicked “[Save as Draft](#)”, you will see this screen which means you have successfully saved the draft.

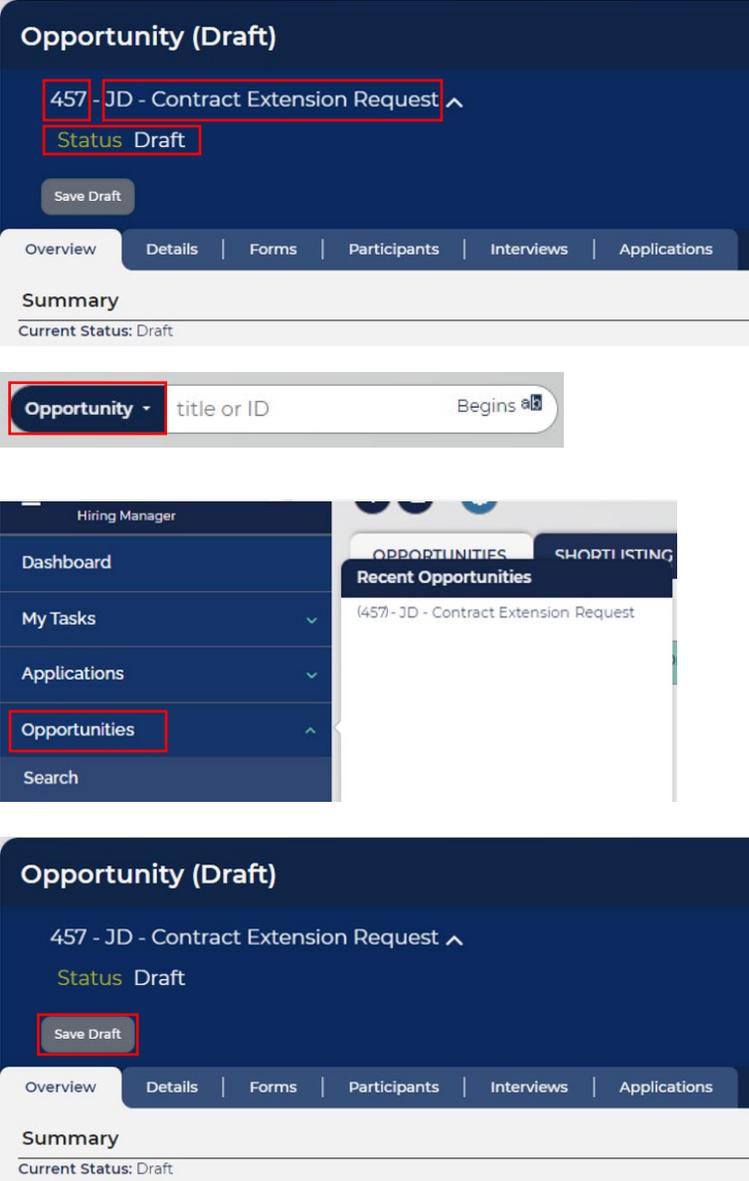
This screen informs you of the

- [Opportunity ID](#)
- [Opportunity Title](#)
- [Opportunity Status](#)

You can search for the saved draft opportunity using the search function at the top right of your screen, entering the “**Opportunity Title**” or “**Opportunity Number/ID**”. Ensure the search parameter is set to “[Opportunity](#)”.

You can also find the saved request by clicking “[Opportunities](#)” within the left-hand pane. A recent list of Opportunities will come up for you to choose from.

1a) On your draft opportunity, if you are ready for the next step, select the grey “[Save Draft](#)” button. Then follow on from [step 5](#) above to activate the post and submit the request.



Opportunity (Draft)

457 - JD - Contract Extension Request ^

Status Draft

Save Draft

Overview | Details | Forms | Participants | Interviews | Applications

Summary

Current Status: Draft

Opportunity - title or ID Begins

Hiring Manager

Dashboard

My Tasks

Applications

Opportunities

Search

OPPORTUNITIES SHORTLISTING

Recent Opportunities

(457) - JD - Contract Extension Request

Opportunity (Draft)

457 - JD - Contract Extension Request ^

Status Draft

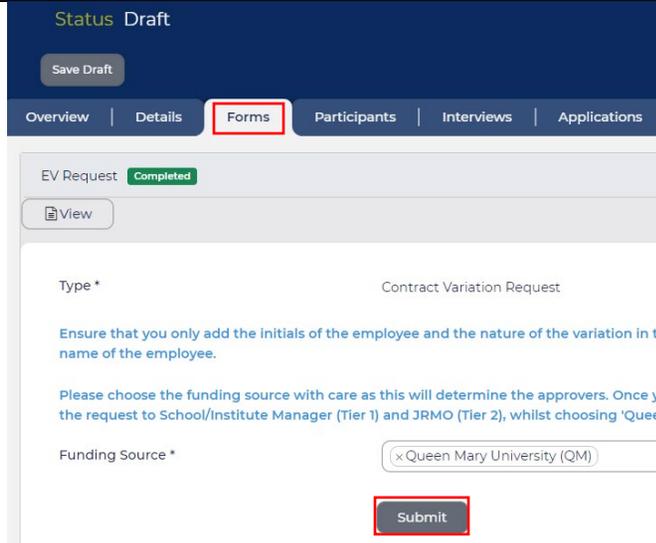
Save Draft

Overview | Details | Forms | Participants | Interviews | Applications

Summary

Current Status: Draft

1b) If you need to update the opportunity form, go to the **Forms** tab, select “**EV Request**” to open the form, update what you need and then select “**Submit**” to save the changes.



1bi) If you need to edit the form again, select “**Edit**”.



1bii) Once you are happy with the form, select the grey “**Save Draft**” button. Then follow on from [step 5](#) above to activate the post and submit the request.

Searching for a CVR

For the purposes of CVRs, the opportunities you create ([shown earlier in this document](#)) and their **Opportunity ID** (475 in the example above) are irrelevant. It merely acts as a placeholder for the CVR.

The **Application ID** (2299 in the example on [page 5](#)) is what you need to make note of when referring to CVR forms.

Method 1: Use the search box on the top right of your dashboard ensuring the search parameter is set to “**Application**”.

Method 2: If you happen to search for the opportunity first and land on the opportunity page,

- a) Navigate to the applications tab.
- b) Select the number in the table which will take you to the list of applications associated to the opportunity (there should only be one for CVRs).

- c) Double click on the name of the individual you wish to view the request for. You will then land on the application page.

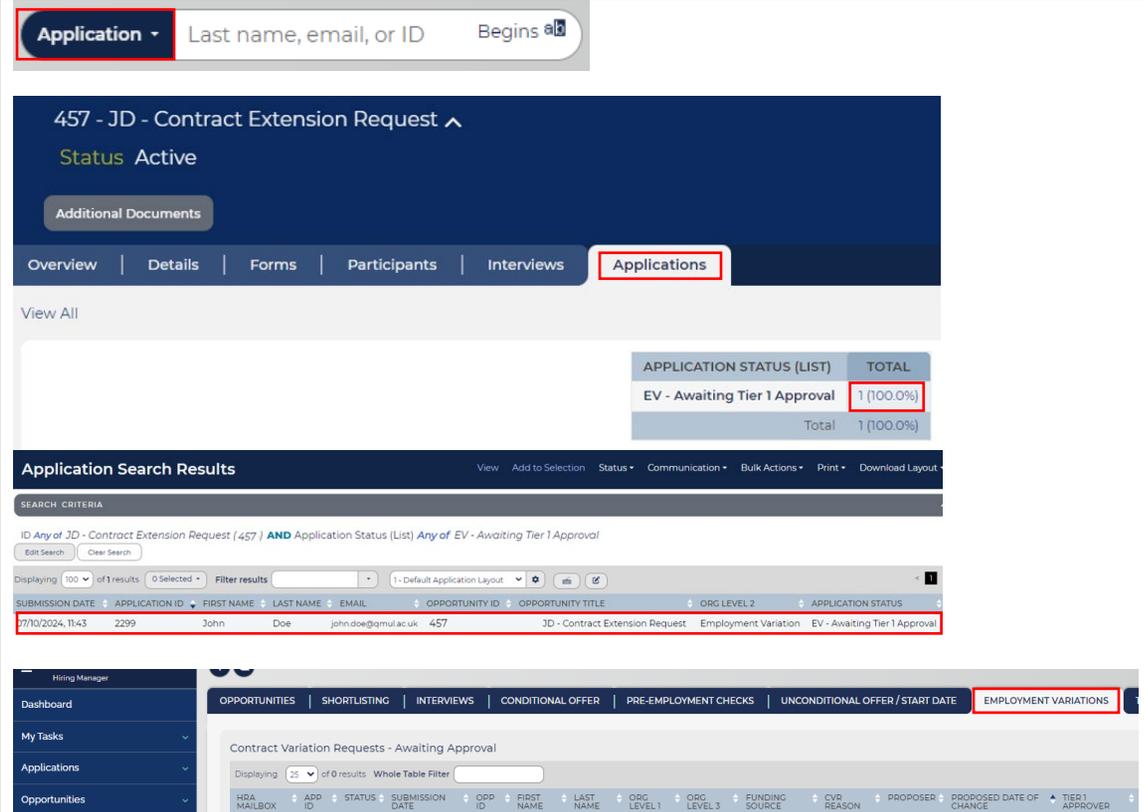
Method 3:

- a) Navigate to the “**Employment Variations**” tab on your dashboard.

You will be presented with boxes containing requests that are:

- Awaiting Approval.
- With HR Admin to Review.
- In Draft.
- Have been Processed.
- Have been Rejected.

- b) Double click on the CVR you wish to view.



The screenshot shows the HR system interface. At the top, a search box is set to "Application" with the criteria "Last name, email, or ID" and "Begins with". Below this, the details for opportunity "457 - JD - Contract Extension Request" are shown, with a status of "Active". A navigation bar includes tabs for Overview, Details, Forms, Participants, Interviews, and Applications (which is highlighted). A table shows the application status: "EV - Awaiting Tier 1 Approval" with a count of 1 (100.0%).

Below the opportunity details, the "Application Search Results" section is visible. It shows search criteria: "ID Any of JD - Contract Extension Request (457) AND Application Status (List) Any of EV - Awaiting Tier 1 Approval". The search results table is as follows:

SUBMISSION DATE	APPLICATION ID	FIRST NAME	LAST NAME	EMAIL	OPPORTUNITY ID	OPPORTUNITY TITLE	ORG LEVEL 2	APPLICATION STATUS
17/10/2024 11:43	2299	John	Doe	john.doe@qmul.ac.uk	457	JD - Contract Extension Request	Employment Variation	EV - Awaiting Tier 1 Approval

At the bottom, the "Employment Variations" tab is selected, showing a table of "Contract Variation Requests - Awaiting Approval". The table headers include: HRA MAILBOX, APP ID, STATUS, SUBMISSION DATE, OPP ID, FIRST NAME, LAST NAME, ORG LEVEL 1, ORG LEVEL 3, FUNDING SOURCE, CVR REASON, PROPOSER, PROPOSED DATE OF CHANGE, and TIER 1 APPROVER.

Re-submitting a rejected request

When a contract variation request is rejected, you will receive an email to inform you of the reason.

- 1) Search for the request using one of the methods [above](#).
- 2) Once on the applicant (employee) page, click the green “**Update**” button. This will launch the CVR form.
- 3) Make the necessary edits/updates to the form and then click “**Submit**”.
- 4) Upon submission, the status will change to “**EV - Awaiting Tier 1 Approval**”.

Application Summary

2299 - John Doe ^

JD - Contract Extension Request

Status EV - Not Approved Applied 7 October 2024 at 11:43:09 BST

✓ Update

Summary

Notes

Forms (3)

Access

CVR Form

Deleting a request created in error

You will need to contact the [HR Operations team](#) to delete the request for you.