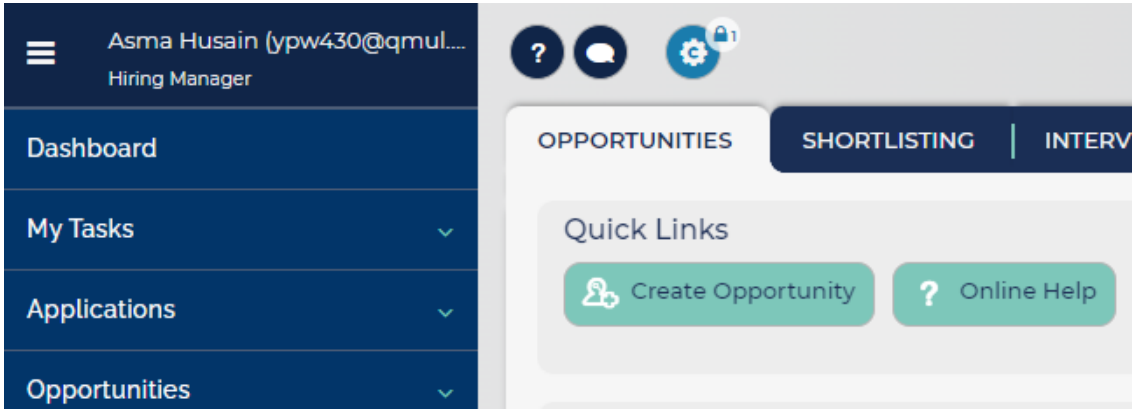
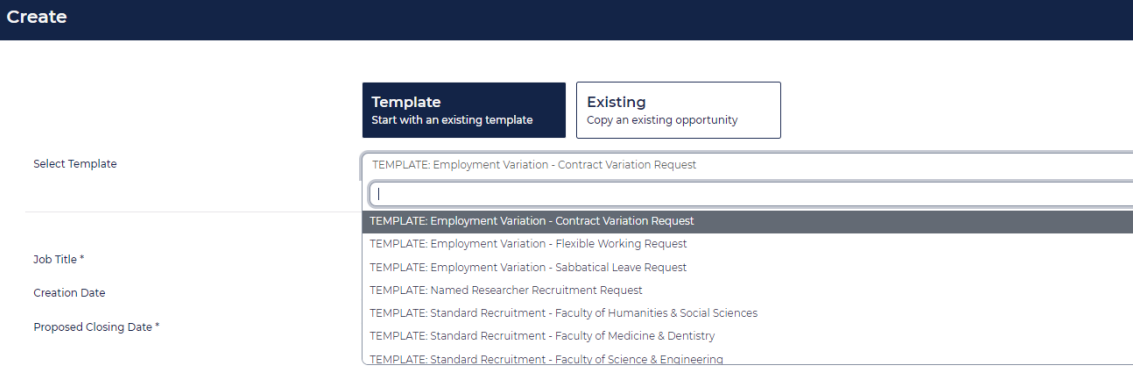



OLEEO – LINE MANAGER USER GUIDE

GUIDE & FAQs RAISING A CONTRACT VARIATION REQUEST (CVR) FORM

In this guide you will be shown how to submit/re-submit/Save/delegate contract variations, which include:

- Extension of Fixed term/Temporary Contract
- Fixed term/Temporary to Permanent Contract
- Acting Up
- Additional responsibility
- Job Regrade / Promotion / Transfer / Demotion
- Secondment
- Change of Hours
- Market / Retention Supplements & Royalty Payments

STEP	EXAMPLE
Log into Oleeo.	LINK
Click 'Create Opportunity'	
Select 'Contract Variation Request' from the drop-down menu. Note: Do not click on 'Existing' tile unless you want to use a previous request that you submitted as a carbon copy for your current request.	
Under 'Job Title' write only the initials of employee followed by the request type. Put a future date that is at least 3 months ahead in the 'Proposed Closing Date' field.	

(**Note:** this field has no bearing on this process. However, the date needs to be in the future.)

Add the type of '**Funding Source**'.
Note: This is a multi-select field.

You can choose to either **Save as Draft** or move forward with the request by clicking **Create**.

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 *

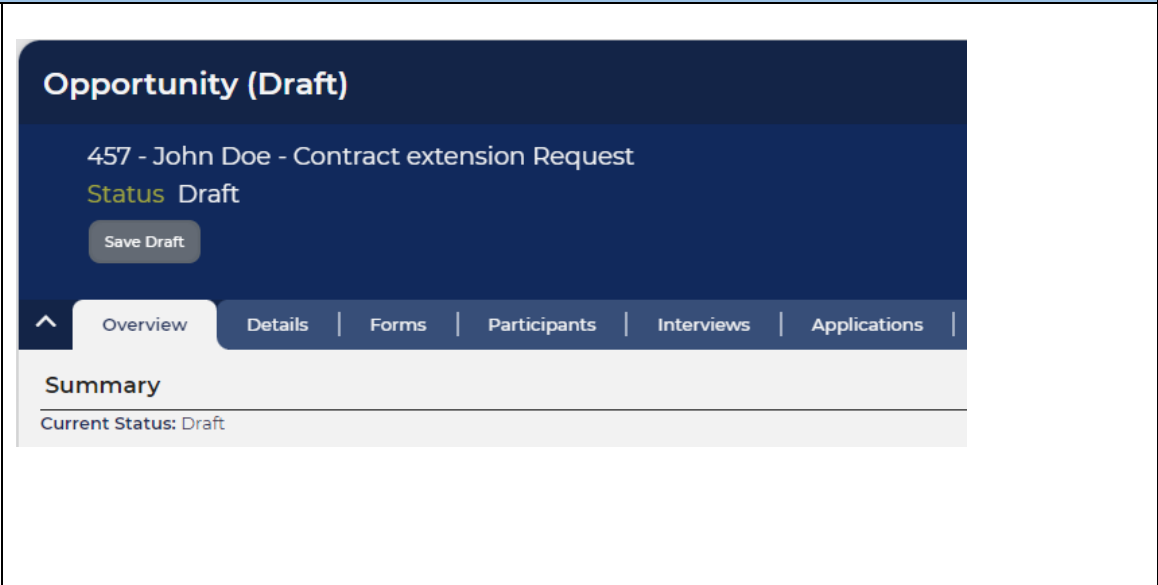
x Queen Mary University (QM) | x

Cancel Create Save as Draft

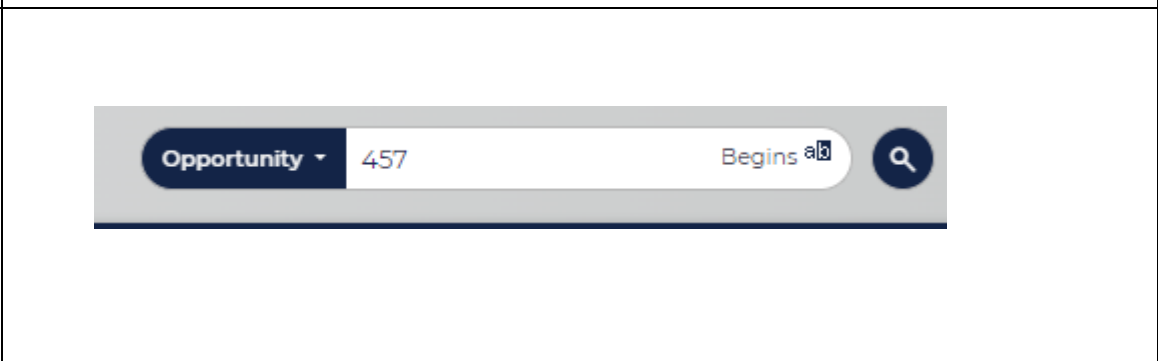
Bringing a 'Save as Draft' form back to 'Live'.

If you have clicked '**Save as Draft**' you will see this screen.

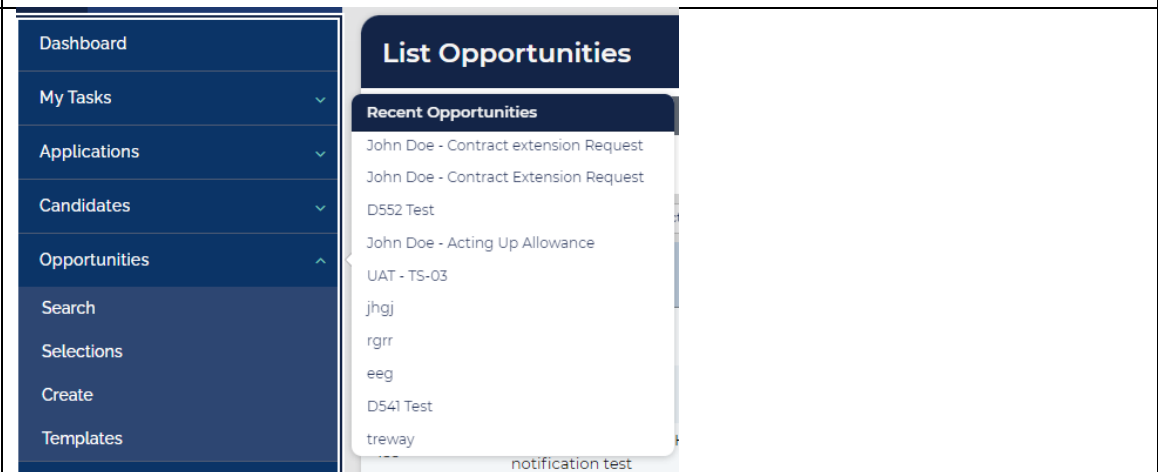
Click **Save Draft** to save this Opportunity as Draft.



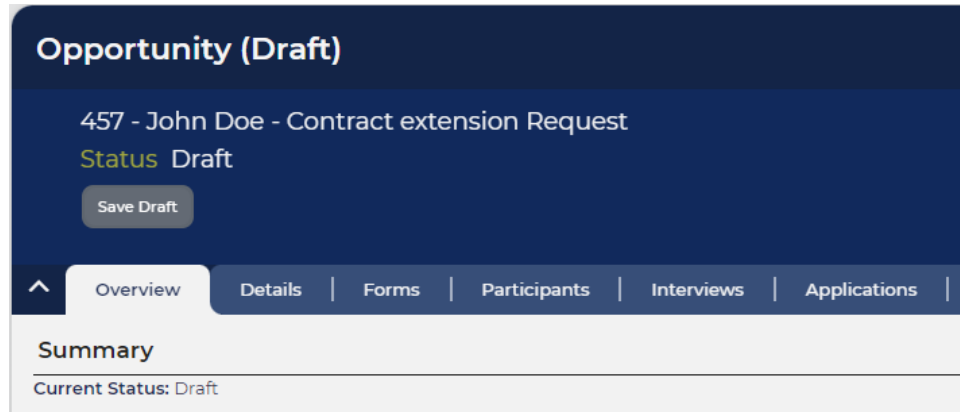
You can search for the saved draft opportunity using the **Search** function at the top right of your dashboard whilst using the **Opportunity ID** (in this case, it is 457). Make sure the search parameter is set to '**Opportunity**'.



You can also find the saved request by clicking **Opportunities** in the left-hand pane. A recent list of Opportunities comes up for you to choose from.



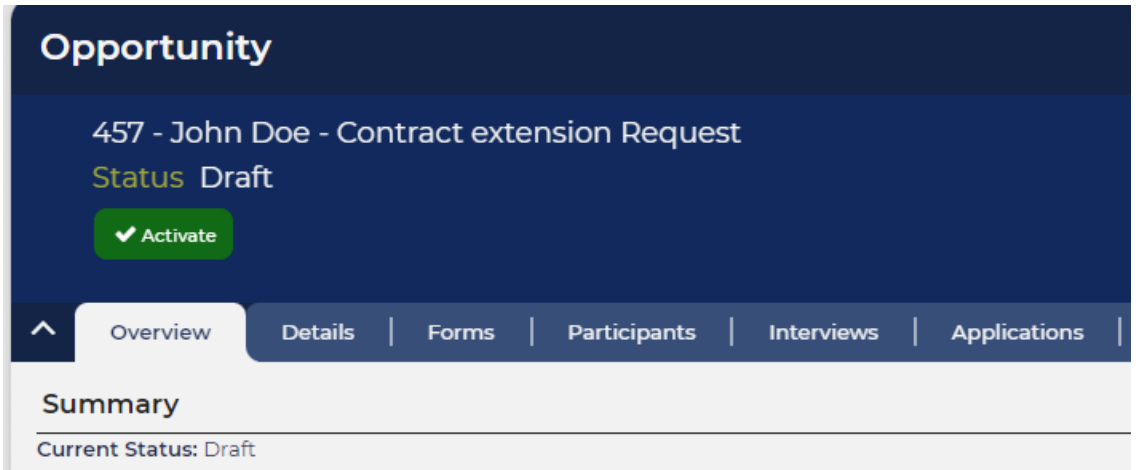
Click the grey **Save Draft** button to open up the form.



The request is still sitting in draft and needs to be activated before you can add the request details onto the form.

Note that the **Status** is showing as **'Draft'**.

Click **'Activate'**.

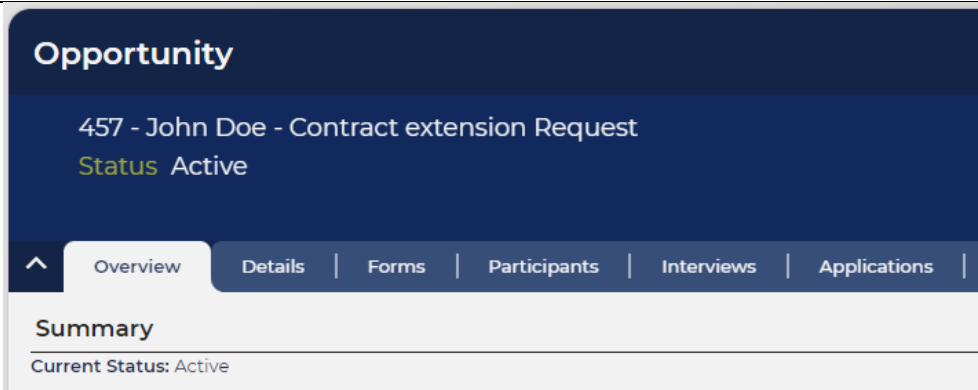


You have now created an **'Opportunity'** which acts only as a placeholder for you to create your contract variation request on top.

Note that the Opportunity **Status** is showing as **'Active'**.

Click **Add Candidate / Employee** at the top right corner.

Enter the **name** and **email address** of the employee. And click **Submit**.



Opportunity ← Add Candidate / Employee

457 - John Doe - Contract extension Request
Status Active

Add Candidate / Employee

First Name *

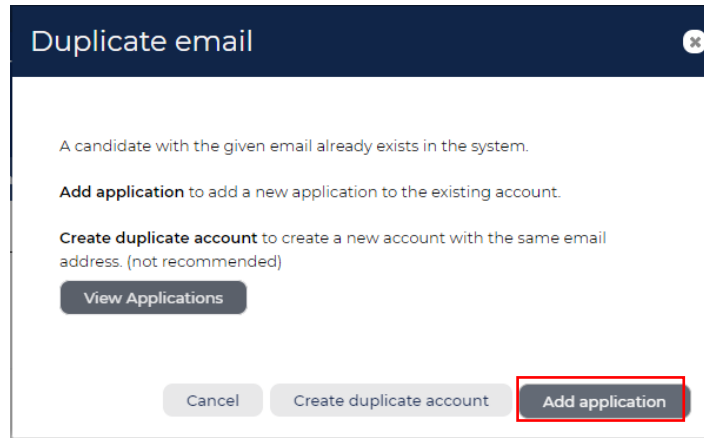
Last Name *

Email *

Application Centre x

If multiple applications have been submitted previously for the employee, the system will bring up a warning for you.

Click **Add Application** if this is not a duplication, otherwise **view applications** to see all previous requests submitted for this employee.



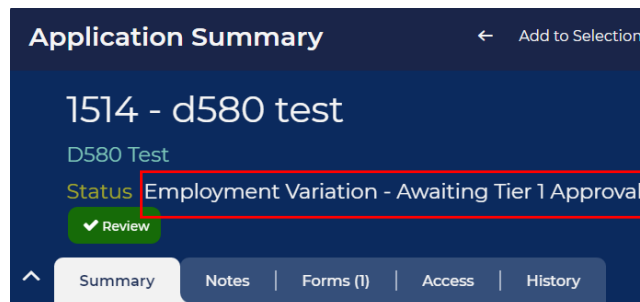
Now you are ready to complete a Contract Variation Request form.

Click **Request Form**.

Complete the form that comes up. Add any **comments**, if needed. Attach any documents at this point to support your request. Click **'submit'**.

Please note that once you have submitted the form, no edits can be made and will NOT show for the approver.

You will now notice the status change to **Awaiting Tier 1 Approval**.



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

If the Request is approved, the relevant paperwork will be drawn-up and sent to the employee by the HR Operations Team, as applicable.

FREQUENTLY ASKED QUESTIONS

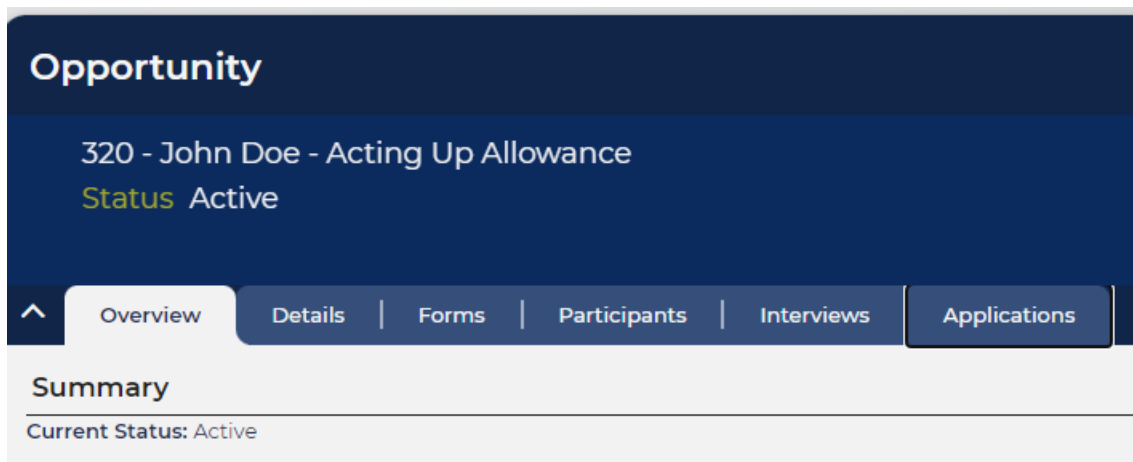
1. What is the difference between an Opp ID and an App ID?

For purposes of Contract Variation requests, please note that the 'Opportunity ID' (457 in above example) is not relevant. It merely acts as a placeholder for your Contract Variation request. The App ID ('1511' in the above example) is what you need to make note of when referring to Contract Variation request forms.

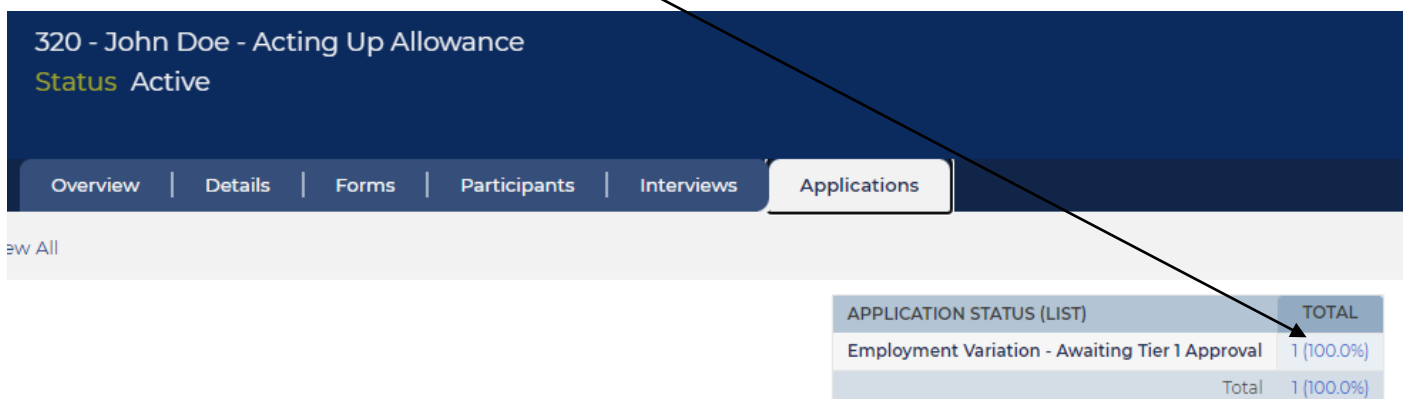
When using the search function to look for a Contract Variation request form, ensure that you choose the 'Application' parameter.

2. How do I return to the CVR form (or the 'App ID') if I accidentally land on the 'Opportunity' page for a CVR?

- This what the screen would look like if you accidentally land on an Opportunity page for a CVR (note that the Status of Opportunities for all submitted CVR's will say 'Active');



- In order to see the Contract variation request form, click the 'Applications' tab and then the Employment Variation in the table in blue;



- Double click on the Application displaying in the list that comes up (there should always only be one for CVRs);

Application Search Results View Add to Selection Status Communication Bulk Actions Print Download L

SEARCH CRITERIA

ID **Any of** John Doe - Acting Up Allowance (320) **AND** Application Status (List) **Any of** Employment Variation - Awaiting Tier 1 Approval

Edit Search Clear Search

Displaying 100 of 1 results 0 Selected Filter results Default Application Layout

SUBMISSION DATE	APPLICATION ID	FIRST NAME	LAST NAME	EMAIL	OPPORTUNITY TITLE	ORG LEVEL 1	APPLICATION STATUS
25/09/2023, 11:45	1390	John	Doe	john.doe@qmul.ac.uk	John Doe - Acting Up Allowance	Employment Variation	Employment Variation - Awaiting Tier 1 Approval

- You will land on the page for the CVR form;

Application Summary ← Add to Selection A

1390 - John Doe ^

John Doe - Acting Up Allowance

Status Employment Variation - Awaiting Tier 1 Approval Ap

Review Delegate Tier 1 Approver

Summary Notes Forms (1) Other Applications (1) Access

Application Summary

Email john.doe@qmul.ac.uk

3. How do I delete a request that was created in error?

You will need to get in touch with your [HR Operations team](#) to request that they delete the form for you.

4. My request has been rejected. How do I update and re-submit the form?

- Search for the request via the Search function at the top right using the App ID **OR** click 'Applications' in the left-hand pane and then 'Search'. This will bring up a list of all of your submitted requests. Double click the one that you need to re-submit.
- Click the green 'update' button on the form that comes up.
- Make the necessary edits/updates to the form and click 'Submit'.
- The form will now show as being at Tier 1 Approval.

5. Can I delegate an approval that I have pending?

Yes, as an approver you can delegate a request that is waiting for your approval to another approver.

- Go into the Contract Variation Request form that you wish to delegate. You can either find it via your dashboard under the 'Employment Variation' tab, or you can use the 'Search' function at the top right of the page. For contract variations, you will need the Application ID number. Make sure to change the search parameter to 'Application' before entering the App ID into the search field.
- Click the blue 'Delegate Tier 1 Approver' button;



- Enter the first name of the delegated approver and select their name from the drop down list;

A screenshot of the 'CVR - Delegate Tier 1 Approver' form. The top navigation bar includes 'Summary', 'Notes', 'Forms (1)', 'Other Applications (1)', 'Access', 'History', and 'CVR - Delegate Tier 1 Approver'. Below the navigation bar, there are buttons for 'View', 'Print', 'Close', and 'Launch Another Form'. The main form area has a label 'New Tier 1 Approver *'. To the right of the label is a search input field containing 'lee'. Below the input field, a dropdown list shows 'Nanda Beeharry' and 'Lee McNally'. A 'Submit' button is located below the dropdown list.

- Click 'Submit'. This will trigger a notification to the delegated approver.

Note: If you are unable to find the name of the Approver in the list, then that might mean that the person does not have the required profile to approve the request on your behalf. In such cases, they will have to email the IT Servicedesk requesting for the 'Approver' profile to be assigned to them on Oleeo.