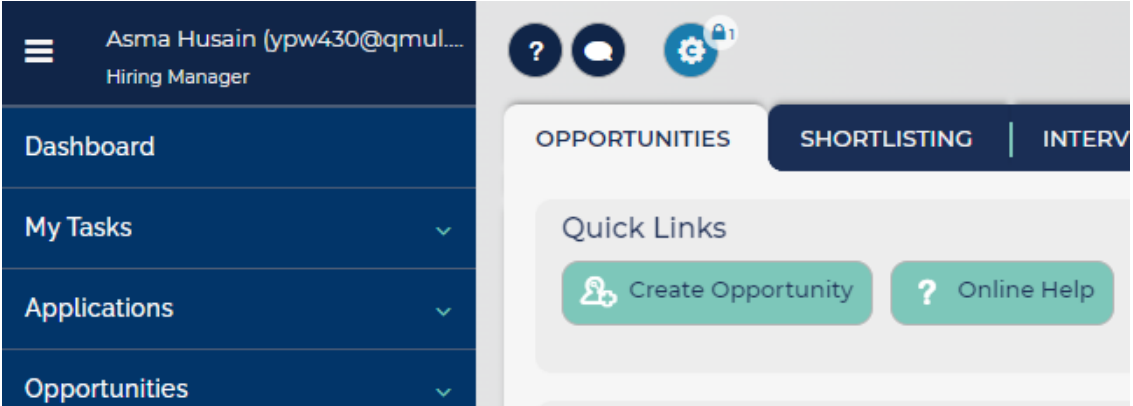
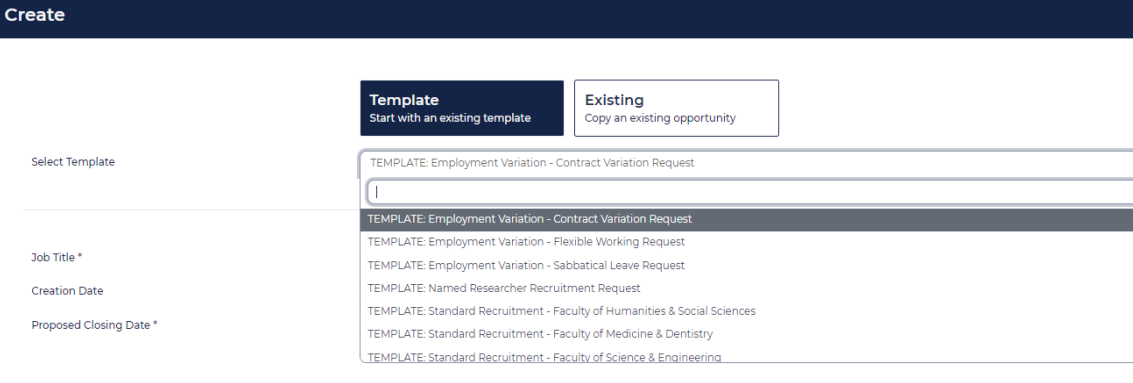

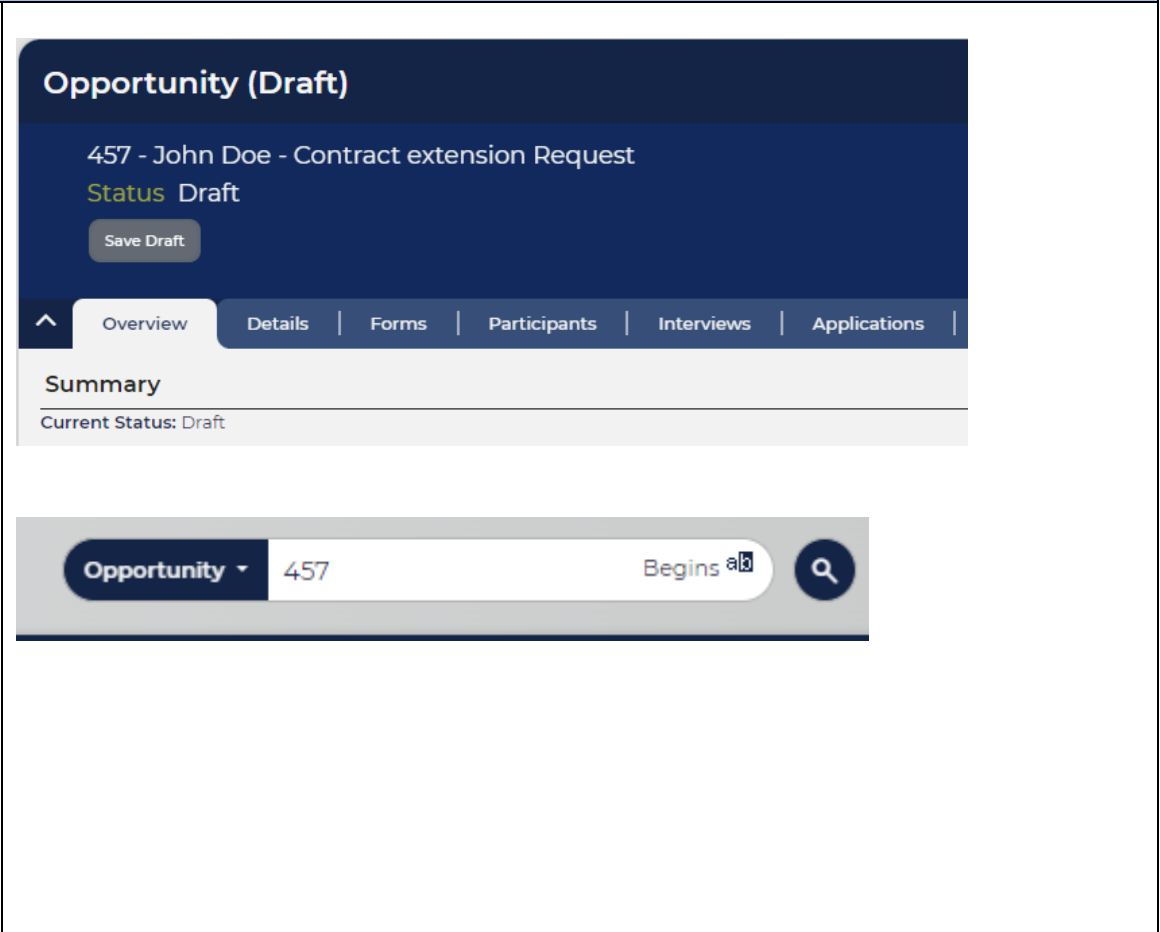


OLEEO – LINE MANAGER USER GUIDE

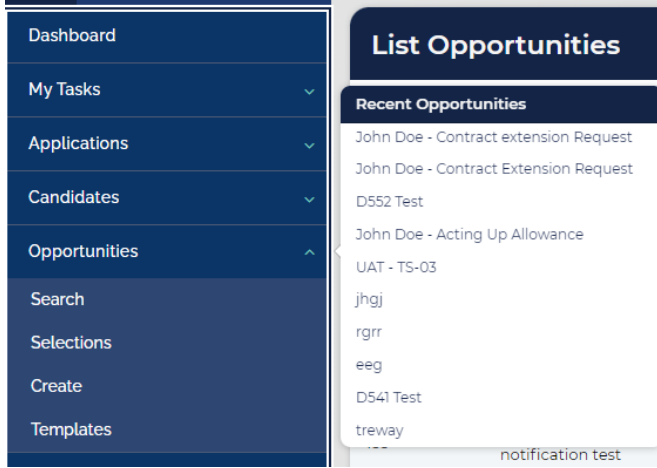
GUIDE	
SUBMITTING A CONTRACT VARIATION REQUEST FORM	
<p>In this guide you will be shown how to submit/re-submit/Save variations to contracts which include.</p> <ul style="list-style-type: none"> Extension of Fixed term/Temporary Contract Fixed term/Temporary to Permanent Contract Acting Up Additional responsibility Job Regrade / Promotion / Transfer / Demotion Secondment Change of Hours 	
STEP	EXAMPLE
Log into Oleeo.	LINK
Click 'Create Opportunity'	
Select 'Contract Variation Request' from the drop-down menu. <p>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.</p>	
Under 'Job Title' write the name of the employee and the request type. <p>Put a future date that is at least 3 months ahead in the 'Proposed Closing Date' field.</p> <p>(Note: this field has no bearing on this process.</p>	

<p>However, the date needs to be in the future.)</p>	
<p>You will see that the 'Type' field is pre-populated.</p> <p>Add the type of 'Funding Source'.</p> <p>Note: This is a multi-select field.</p> <p>You can choose to either Save as Draft or move forward with the request by clicking Create Opportunity.</p>	<p>If you don't have all the information to hand, you can 'Save as Draft' and complete the required fields later.</p> <p>Type * <input type="text" value="Contract Variation Request"/></p> <p>Funding Source * <input type="text" value="x Queen Mary University (QM)"/></p> <p><input type="button" value="Cancel"/> <input type="button" value="Create Opportunity"/> <input type="button" value="Save as Draft"/></p>

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

<p>If you have clicked 'Save as Draft' you will see this screen.</p> <p>You will need to click Save Draft to bring the form out of its draft stage and continue with the form.</p> <p>If you have logged out and then logged back in, then search for the Opportunity ID ('457') using the Search function at the top right. Make sure to change the search parameter to 'Opportunity'.</p> <p>Then click on Save Draft.</p>	
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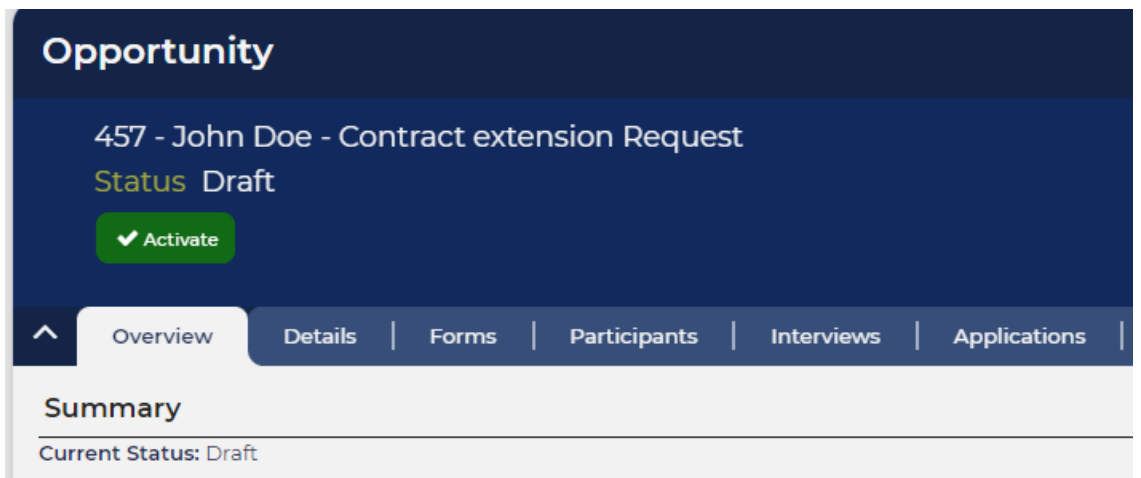
You can also find the saved request by clicking **Opportunities** in the left-hand pane. A recent list of Opportunities comes up for you to choose from.



The request is now sitting in draft and needs to be activated first before you can add the request details on the form.

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

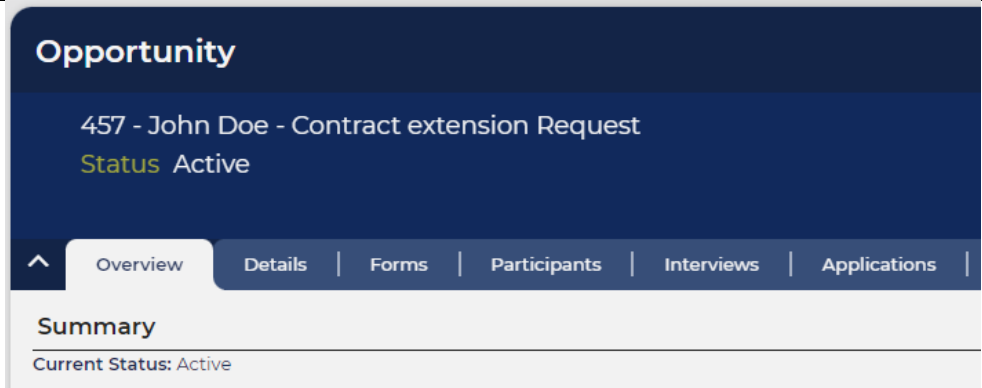
Click **'Activate'**.



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

Add Candidate / Employee

First Name *

Last Name *

Email *

Application Centre

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

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

Duplicate email

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)

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 a form, any new document uploads or form edits will **NOT** show for the approver.

Application Summary

1511 - John Doe

John Doe - Contract extension Request

Status Manually Added, Application Not Complete

Summary | Notes | Forms (0) | Access | History

Application Summary

Email john.doe@hotmail.com

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

The screenshot shows a mobile application interface for an 'Application Summary'. The title is 'Application Summary' with a back arrow and 'Add to Selection' text. Below the title is the application ID '1514 - d580 test' and the name 'D580 Test'. The status is 'Status Employment Variation - Awaiting Tier 1 Approval' with a green 'Review' button. At the bottom, there is a navigation bar with tabs: 'Summary' (selected), 'Notes', 'Forms (1)', 'Access', and 'History'.

The form will then go through the standard two-step approval process. You will receive a notification when the request is approved at final tier.

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

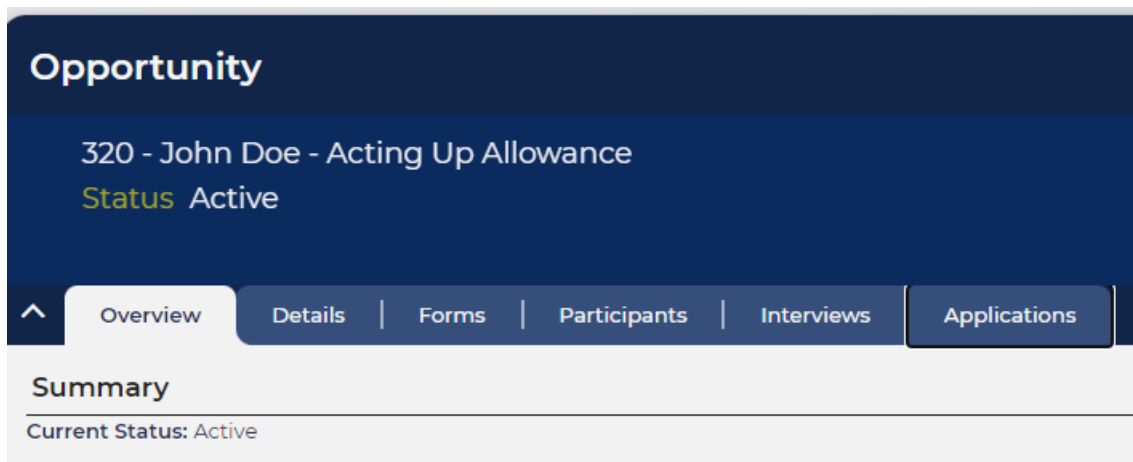
1. What is the difference between an Opp ID and an App ID?

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.

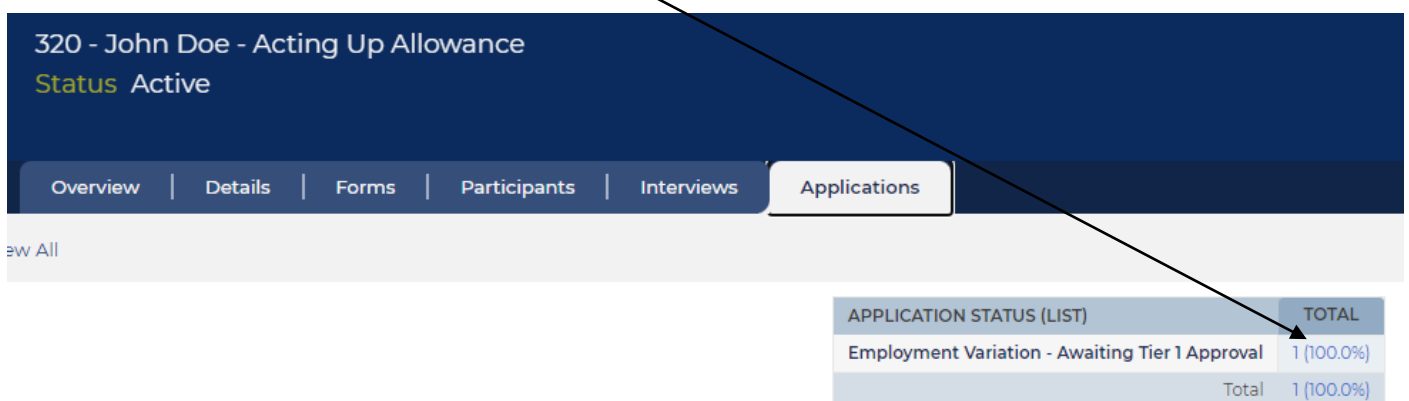
When using the search function to look for a Contract Variation request form, ensure that you choose the 'Application' parameter.

2. How do I return to the CVR form 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);

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;

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 had 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', and 'History'. 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.