# **Quick Guide to Online Staff Request Forms**

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# Logging In

The HR Forms Hub is found at <u>https://archtest.tcd.ie/hrforms/Pages/default.aspx.</u> This is a SharePoint site, which is connected to Active Directory (the login server). You have to be logged into the College network to access the HR Forms Hub. SharePoint works best using Internet Explorer.

# HR Forms Hub – Staffing Request Home

Click on the Staff Requisition button



This brings you to the Staffing Request Home page:

Staffing Request Home			
Usage Tips - Olick on New Darf Request lautton - to onsele new staffing request - Olick on New Darf Request lautton - to onsele new staffing request request them to seek or 200 - To glob circles on both Storn an top Mit of the influen - To Star on content status in taffing request, which from the doop storem fait under Content thatus filter	Select your proxy to review / approve / reject Staffing Requests ProxyPicker Assign your Proxy	New Dating Request	
lamost Status (That		1.1.1.1.1	~
Seffing Requests History			

# **Proxies**

# **Setting a Proxy**

From time to time, a user may wish to nominate someone else to act as their proxy to review / approve / reject Staff Request Forms.

To set a proxy, first go to the Staffing Request Home page

Go to the Proxy Picker section – SharePoint should be able to find the person for you. Click on the Browse icon to search for your proxy:

ProxyPicker	
Assign your Proxy	
Proxy :	
	1

This opens a search facility. Type in the person's name. Click on the search button, and then a list of people with that name will appear.

	Display Name	E-mail Address	Title	Depart
All Search Results (3)	=			
All Users (0)	Karen Roantree	ROANTREK@tcd.ie		D2101
Active Directory (3)	Karen Roantree			

Select the person you require, click OK. The name will now appear in the proxy field.

Assign your Proxy	
Proxy :	♣⁄ 💷
Assign Proxy	

Click on the Assign Proxy button to complete the process

An email will go to your assigned proxy informing them that they are now your proxy for upcoming Staff Request forms.

# **Removing a Proxy**

To disable the proxy setting, go to the Staffing Request home page.

The following will appear on the home page when a proxy is active:



To remove the Proxy, click on Remove Proxy button

An email will go to your assigned proxy thanking them and telling them they are no longer your proxy.

# **New Staff Request**

# **Hiring Lead Stage**

Before starting the staff request process, we recommend that hiring leads refer to the HR "<u>Guide to the Management of Temporary Employment</u>" which can be found on the HR website (<u>www.tcd.ie/hr</u>).

#### Access to the form



Click on the New Staff Request button.

A brand new staffing request form will open, which you can now begin to fill out.

### **Summary Detail**

Your School/Area and Discipline will be automatically filled in.

A dropdown list of **Cost Centres** will appear – you should only be able to pick from the list available to you (cost centres that correspond with your School/Area). You can choose more than one.

Fill in the Job Title and the Reporting To fields – these are text fields, 50 characters max.

#### Work Group

Select the **Workgroup** from the dropdown list. If you do not select a workgroup, the system assumes that a new workgroup needs to be set up – an email is sent to HR Support who will contact you about setting up a new workgroup. If the workgroup already exists and you leave this blank, the form will take much longer to process as HR Support will be contacted, and they will revert to you looking for information about a new workgroup – so it is important to only leave this field blank when a new workgroup is required.

If the person is a **work group owner**, select Yes from the dropdown. A new field will appear, where you can choose the work group they will own.

### Funding

There are three parts to the Funding section: Type of funding, Funding Percentage and ABC Pay Budget. If you have queries about the funding for your particular staff request, your Faculty/Division Finance Partner should be able to assist you with the details required for this section.

#### Type of Funding

Choose the type of funding (Core, Non-Core, Research or Charge Out). Depending on which type of funding you choose, a new section will appear on the report relating to this type of funding.

#### **Core Funding**

For Core funding you need to identify the cost centre, activity code (source of funds will automatically populate with 1112), percentage funded from that source, whether the post was included in the ABC 5 year forecast and the details of the funding if it is included:

		Funding			
✓ Core funding ☐ Non-core funding					
Research funding					
Charge out					
ore funding					
Hit Cost Centre Code l	button linked w	vith fundina			
2101		,			
A stivity Co de		Course of Fund		Eurod 04	
Activity Code		Source of Fund		Fund %	0
Add Core Fund					
Total Fund Percent:	0				
Was this post included in the most	Specify the an most recent A	nount and duratio \BC 5 year pay but	n of funding for thi: Iget for your area.	s post in the	
recent ABC 5 year	Amount				
pay budget for your area? (tick =	Duration		Year		~
Yes, untick = No) 🗹					

#### Non-Core Funding

For Non-Core funding you need to identify the cost centre, activity code, choose the source of funds (either 1212 or 3100), percentage funded from that source, whether the post was included in the ABC 5 year forecast and the details of the funding if it is included:

		Fund	ing		
Core funding Non-core funding Research funding Charge out					
Non Core funding Attach relevant docur Hit Cost Centre Code I 2101	nentation in t button linked	the attachmen with funding	t section below.		
Activity		Source of	Funds again	Eurod %	
Activity		Source of	1212		0
Add non-core fund					
Total Fund Percent:	0				
Was this post included in the most	Specify the a most recent	mount and du ABC 5 year pa	ration of funding y budget for your	for this post in th area.	le
recent ABC 5 year pay budget for your area? (tick =	Duration		Year		~

#### **Research Funding**

For Research funding you need to identify the Cost Centre, Project Number and Award, and

the percentage funded from that source.

			Funding				
<ul> <li>□ Core funding</li> <li>□ Non-core funding</li> <li>☑ Research funding</li> <li>□ Charge out</li> </ul>	5						
osoarch funding							
it Cost Centre Code I	button lir	nked with fu	nding				
it Cost Centre Code   2101	button lir	nked with fu	nding				
2101 Project No	button lir	nked with fu Task	nding Av	vard	F	und %	0
2101 Project No Add Research fund	button lir	nked with fu Task	nding Av	vard	F	und %	0

#### Charge Out

For Charge Out funding you need to identify the Cost Centre, Customer Number, Bill to Location, and the percentage funded from that source. You will also need to attach a Letter of Comfort.

			Funding			
Core funding						
□ Non-core funding						
Research funding						
✓ Charge out						
section below. Hit Cost Centre Code but	ton linked	with fu	nding	ument in the u		
01.01						
2101						
2101 Customer No			Bill to Location		Fund %	0
2101 Customer No Add Charge Out			Bill to Location		Fund %	0
2101 Customer No Add Charge Out Total Fund Percent:	0		Bill to Location		Fund %	0
2101 Customer No Add Charge Out Total Fund Percent:	0		Bill to Location		Fund %	0

#### **Funding Information**

For all cases, you may add more than one source of funds. Click on the Add funding button (Add Core Fund, Add Non-core funding, Add Research funding, Add Charge Out); this will allow you to put in additional sources of funds.

**Important:** The fund percentage field totals as you go – the total fund percent must be 100, or your application will not submit.

Total Fund Percent: 0	
-----------------------	--

For Non-Core Funding, Research Funding and Charge Out funding, you may need to attach documentation. Scroll to the bottom of the form, and select "Click here to attach a file" then follow the directions on screen.

Attachments	
lease attach all relevant documents related to: 1. The funding of the post (non-core funding, charge	le Click here to attach a file
2. Required competencies for the post 3. Any other relevant document	
ote: Multiple files may be attached by selecting Click ere to attach file for each file to be uploaded.	

You will be able to see the list of attachments. Click on the red X to remove them, if required:

Ø	Click here to attach a file
×	PROJECTED.txt
-	

# Detail of Post: New Post / Renewal / Replacement

The Staff Request Form will generate some different fields, depending on the Type of Post.

Under Type of post, you may choose from three (Renewal, Replacement or New Post):

### **Detail of Post**

Job Title	
Job Hac	New Post
Type of Post	Renewal Post
Job Catagony	Replacement Post
Job Category	

Job Category: Select the appropriate job category

Academic
Academic Medical
Admin Support
Building & Services
Library
Research
Senior Management- Administrative
Technical

Annual Rate Schedule: as a rule, you will choose the Default rate schedule.

All Default

Pay Scale Description: Select the pay scale from the dropdown list

PROFESSOR ASSOCIATE PROFESSOR SENIOR LECTURER SENIOR LECTURER CONSULTANT LECTURER (2012) LECTURER BELOW BAR LECTURER

Note: the Pay Scale Descriptions use the older names for Academic posts.

Choose the Pay Scale Code (there is usually only one):



The pay scale range will automatically populate.

Salary Scale

€32540 to €56901

Replacement Type: Choose from the dropdown list.

Adoptive Leave Career Break Career Break - Special Incentive Scheme Carers Leave Failed Probation Sick Leave - Half Pay Leave of Absence Maternity Leave Special Leave of Absence Shorter Working Year Scheme Unpaid Maternity Leave **Unpaid Sick Leave** Termination Retirement Contract Ended Secondment Other

Post Holder being renewed / Name of the previous post holder: Sharepoint should be able

to find the person for you. Click on the Browse icon.

Renewal	
Post Holder being	
reneweu	

This opens a search facility. Type in the person's name. Click on the search button, and then a list of people with that name will appear.

	Display Name	E-mail Address	Title	Depart
All Search Results (3)	Karen Marion Roantree	ROANTRKM@tcd.ie		
All Users (0)	Karen Roantree	ROANTREK@tcd.ie		D2101
Active Directory (3)	Karen Roantree			

Select the person you require, click OK. The name will now appear in the Post Holder being renewed / Previous Post Holder field.

Type of contract: Select the appropriate contract type

	Permanent	1
_	Indefinite Duration	ľ
_	Fixed Term	h
	Specific Purpose	

Depending on the type of contract selected, different information will be required.

For Fixed Term and Specific Purpose contracts, five extra questions need to be answered:

1) Duration of the contract, 2) contract dates, 3) specific purpose of the employment,

4) reasons why Contract of Indefinite Duration will not be offered, and 5) reason for the request.

Type of contract	Fixed Term	✓
Duration	Year	•
Period of extension from	to:	
State the specific purp comply with the Fixed	ose of the employment. This must be stated on the contract to Term Workers Act 2000	
State reason why Cont	tract of Indefinite Duration will not be offered	
Describe reason for		^
request		Y

For Permanent and Indefinite Duration contracts, only the reason for the request question will appear.

Full Time Equivalent (FTE): Type the FTE into this field. The default is 1.0. For example, a person working full time has an FTE of 1.0, but a person working week-on, week-off has an FTE of 0.5.

Required competencies: Fill in the required competencies for the post. If this text is quite long, or if you are provided with a Job Description, you can add an attachment instead.

competencies		
	Attachments	
Please attach all relev 1. The funding of to out letter of con 2. Required comp 3. Any other relev Note: Multiple files mon here to attach file for	ant documents related to: the post (non-core funding, charge mfort, etc.) etencies for the post ant document ay be attached by selecting Click each file to be uploaded.	

You will be able to see the list of attachments. Click on the red X to remove them, if required:



### Submit

When you reach the end of the form, you have the choice to Save as Draft, Delete or Submit.

Submit will send the information to the next person in the chain – for Administrative areas this is the Head of Area, for Academic areas this is the School Administrator.

When you Submit, you will see this message:



An email will be sent to the next person in the process.

The saved form will be listed in the Staffing Requests History under "Current Approval Status: School Admin Review". Click on the file number link to reopen the form.

🖃 Current Approval Status : So					
A130-S171-15-002	🗆 Liza Toye	28/05/2015 10:10	🗌 Liza Toye	28/05/2015 10:15	Renewal Post

#### Save as Draft

If you choose to Save as Draft, the form will be closed.

The saved form will be listed in the Staffing Requests History under "Current Approval Status: HM Draft". Click on the file number link to reopen the form.



#### Delete

Delete allows you to delete the entire form. If you choose Delete, the form will be closed and you will not be able to access it again.

# **Error Messages when Submitting a Form**

There are a few reasons why you may get an error when submitting a form; the most common are missing a mandatory field or forgetting to check the Total Fund Percent field.

#### Mandatory fields

Cost Centre	Cost Centre		* 🗸		
Funding	Cannot be blank Core funding Non-core fur Research fun Charge out	ding	Funding		
Fund %	Core funding Activity Code	000000	Source of Fund	1112	Fund %
FTE	Full Time Equi	valent (FTE)	Cannot be greater the	an 1.0	

#### Does not total 100%

The form allows you to have more than one source of funds, each of which has a Fund %.

These are totalled in the Total Fund Percent field, and they must add up to 100.

Total Fund Percent: 1	00

If you try to submit a form that has an error, you will see a SharePoint message. Click OK

ł		
	Warning	
	The form cannot be submitted because it contains validation errors. Errors are marked with either a red asterisk (required fields) or a red, dashed border (invalid values). Field or group: my:CostCode1 Error: Cannot be blank	
	Click <b>OK</b> to resume filling out the form. You may want to check your form data for errors.	1
	SHOW ERROR DETAILS	<b>S</b> 75
	OK	-1

You will be brought back into the form, where you can fix the errors and Submit once again. The field with the error should be marked with either a red asterisk or a red dashed border.



# **Approval Stages**

At each stage of the process, when the user hits "Submit" an email is sent to the next person in the process.

The approval stages are: Hiring Lead > School Administrator (for Academic Areas only) > Head of School/Area > Finance Partner > HR Partner > Head of Faculty/Division.

The user can click on the link (form id number) in the email. This will bring them directly into the HR Forms Hub and open the form in question.

#### **Edit Item**

In order to do any work on the form, the user must be in Edit mode. Click on "Edit Item" in the left hand corner:



The user can make changes to the form, then choose from "Approve", "Save Draft", "On Hold" or "Reject". (Depending upon permissions: not all users have all four of these choices).

Approve	Save Draft	On Hold	Reject

Note: if you wish to simply approve the form (not making any changes), you will still need to go into Edit mode for the Approve button at the bottom to appear.

### Approve

If the user approves the form, they will be asked to confirm that they wish to submit the form to the next stage:



An email will be sent to the next person in the process.

When the form has been approved and moves to the next stage, the Approval Status list at the end of the form will also update.

Approvers/Reviewers	Approval Status	Date	
Head of Area	Liza Toye	Approved	15/06/2015
Finance Partner	Liza Toye	Not Started	
HR Partner	Liza Toye	Not Started	
Dean/FEC	Liza Toye	Not Started	

The form will also be listed in the Staffing Requests History. There is a green "New" indicator on the form.

Gurrent Approval Status : H	ead of School Review	(1)			
A130-S174-15-001	🗆 Liza Toye	15/06/2015 11:55	🗌 Liza Toye	15/06/2015 14:26	Renewal Post

### On Hold

If the Head of School or Senior Level approver chooses put a form On Hold, the form will be closed. The saved form will be listed in the Staffing Requests History under "On Hold".

On Hold forms will stay in the HR Forms Hub without changing for 1 year, at which time they will automatically delete.

#### Reject

If the approver rejects the request, the process will complete, the form will close and an email will be sent to the Hiring Lead will be informing them that the request has been rejected. If the Hiring Lead wishes to start the process again, they will need to start a new form.

The rejected form will be listed in the Staffing Requests History under "Current Approval Status: Reject".

Current Approval St	atus : Reject (4)	
A130-S174-15-011	Assistant Professor in Nursing	Renewal Post
A130-S174-15-013	Clinical Tutor	Replacement Post

# Editing

Open the form you wish to edit:

∃ Current Approval Status : H	HM Draft (2)				
A130-S171-15-001	🗆 Liza Toye	26/05/2015 09:51	🗆 Liza Toye	26/05/2015 10:00	Renewal Post
A130-S171-15-002	👻 🗌 Liza Toye	28/05/2015 10:10	🗆 Liza Toye	28/05/2015 10:10	Renewal Post

Click on the link to the form's reference number to open the form.

When the form opens initially, you will not be able to edit it. Click on the Edit Item icon in the top left hand corner to allow editing.



The SharePoint menu will change when you are in Edit mode.

SharePoin	t			
EDIT				
	👝 🗈 Copy	×	Current View:	
Save Close	Paste & Cut	Delete	Edit item	÷
3070 01030	Paste	Item		
Commit	Clipboard	Actions	Views	

Make the changes to the form as required, and then choose the appropriate button

(Approve, Save as Draft, On Hold or Reject).

Approve Save Draft On Hold Reject				
	Approve	Save Draft	On Hold	Reject
				,