Date: 18 March 2016

User Guide for Online Staff Request Forms

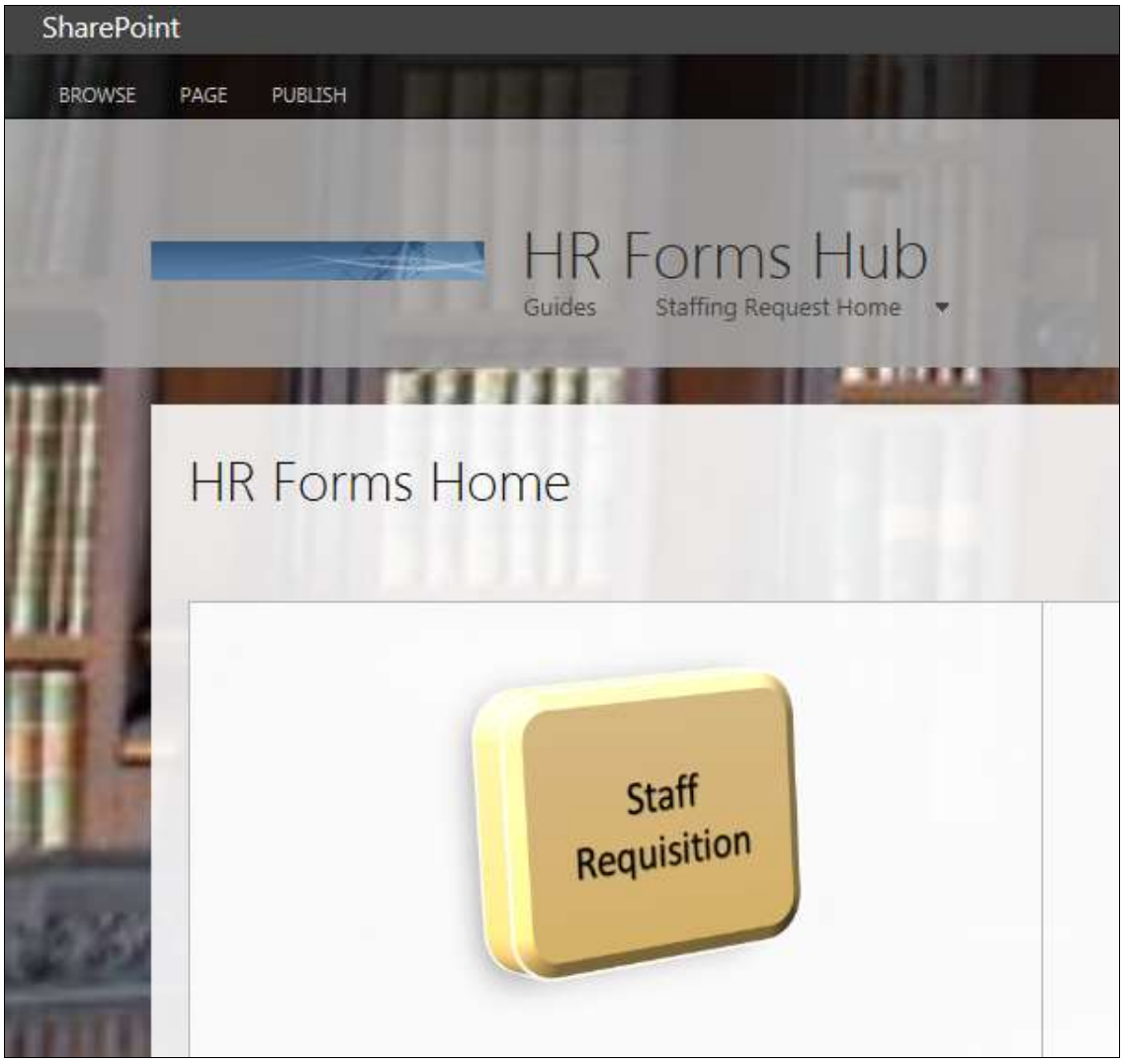


Table of Contents

Logging In 4
Navigating 5
HR Forms Hub 6
Home Page 6
Guides 6
Staffing Request Home 7
HR Forms Listings – Staffing Request Home 8
Staffing Requests History 8
Staffing Request Reports 10
Approval Status 10
Requested Staff Details 11
Head of School View 12
FEC Spreadsheet 13
Proxies 14
Setting a Proxy 14
Removing a Proxy 16
New Staff Request 17
Stage 1 – Hiring Lead 17
Access to the form 17
Summary Detail 19
Work Group 19
Funding 21
Type of Funding 21
Core Funding 22
Non-Core Funding 24
Research Funding 26
Charge Out 27
Funding Information 28
Detail of Post: New Post / Renewal / Replacement 30
Renewal 30
New Post 35
Replacement 38
Submit 44
Save as Draft 45

Delete 45
Error Messages when Submitting a Form 46
Mandatory fields 46
Does not total 100% 46
Stage 2a – School Administrator (Academic areas only) 48
Edit Item 49
Submit 50
Save as Draft 51
Error message when submitting a form 51
Stage 2b – Head of Area / Head of School 52
Approve 53
Save as Draft 54
On Hold 55
Reject 55
Error message when submitting a form 56
Stage 3 – Finance Partner 57
Approve 58
Reject 59
Error message when submitting a form 60
Stage 4 – HR Partner 61
Approve 62
HR Partner changes 63
Reject 64
Error message when submitting a form 65
Stage 5 – Senior Level Manager 66
Approve 67
On Hold 68
Reject 68
Error message when submitting a form 68
FEC Spreadsheet 69
Editing 70
Permissions 71
Who can do what? 71
Appendix 1: Source of Funds Codes 72
Funding Administrative Systems 73

Logging In

The HR Forms Hub is found at https://archtest.tcd.ie/hrforms/Pages/default.aspx - in order to access this easily, save this into your favourites.

At certain stages in the online forms process, the system automatically sends email notifications. These notifications contain links to the HR Forms Hub, and you will be able to access the site directly from the link.

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.

Note: SharePoint is a Windows product, so it is set to work best with Internet Explorer. It should also work in Google Chrome and Mozilla Firefox, but may be laid out slightly differently. Screenshots in this user guide are all taken from Internet Explorer 11.

Navigating

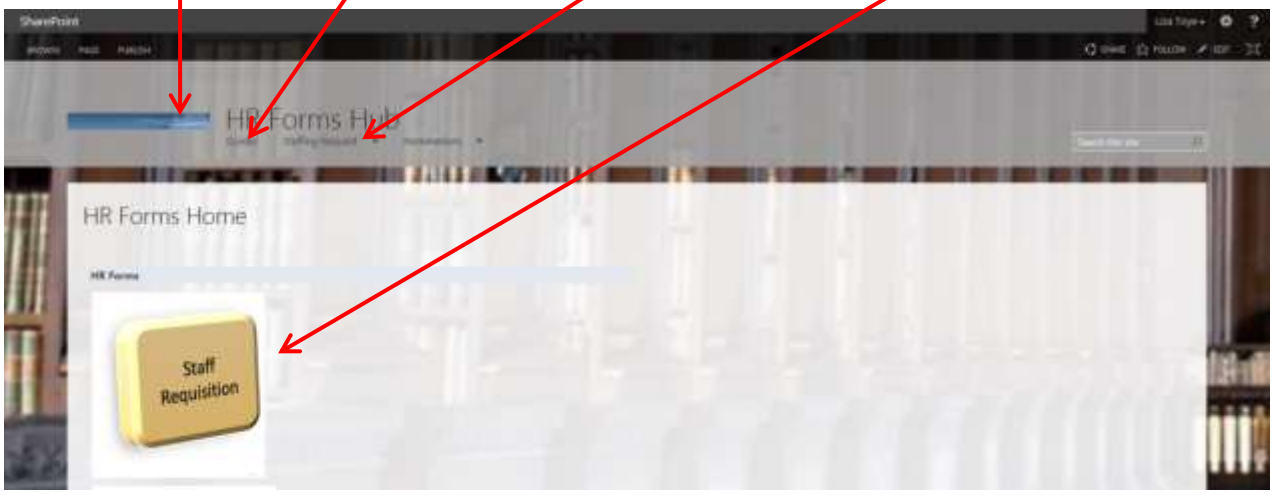
Welcome to the HR Forms Hub. There are four parts to the home page that we will use to navigate around the site:

HR Forms Hub, return to home link

User Guides

Staffing Requests Listings

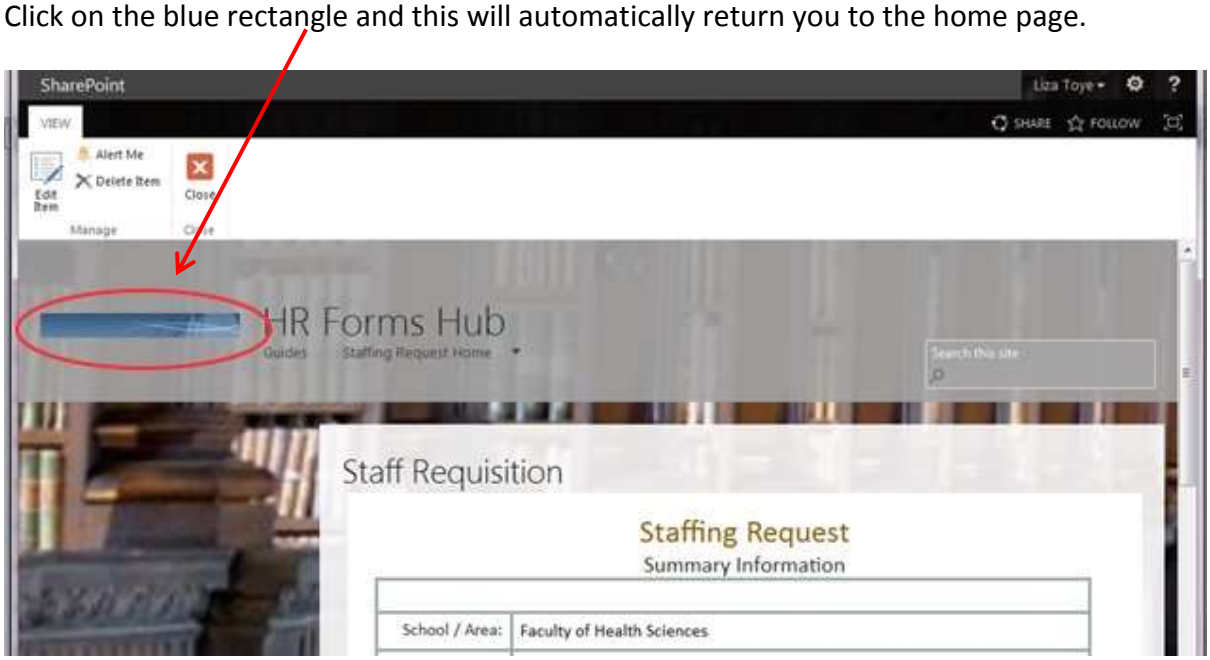
Staff Requisition button



HR Forms Hub

Wherever you are on the site, you should see the HR Forms Hub header.

Click on the blue rectangle and this will automatically return you to the home page.

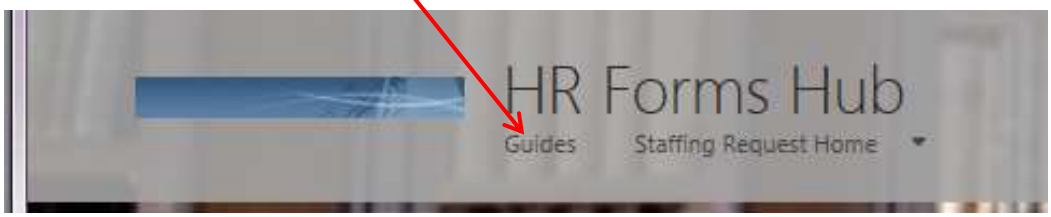


Home Page

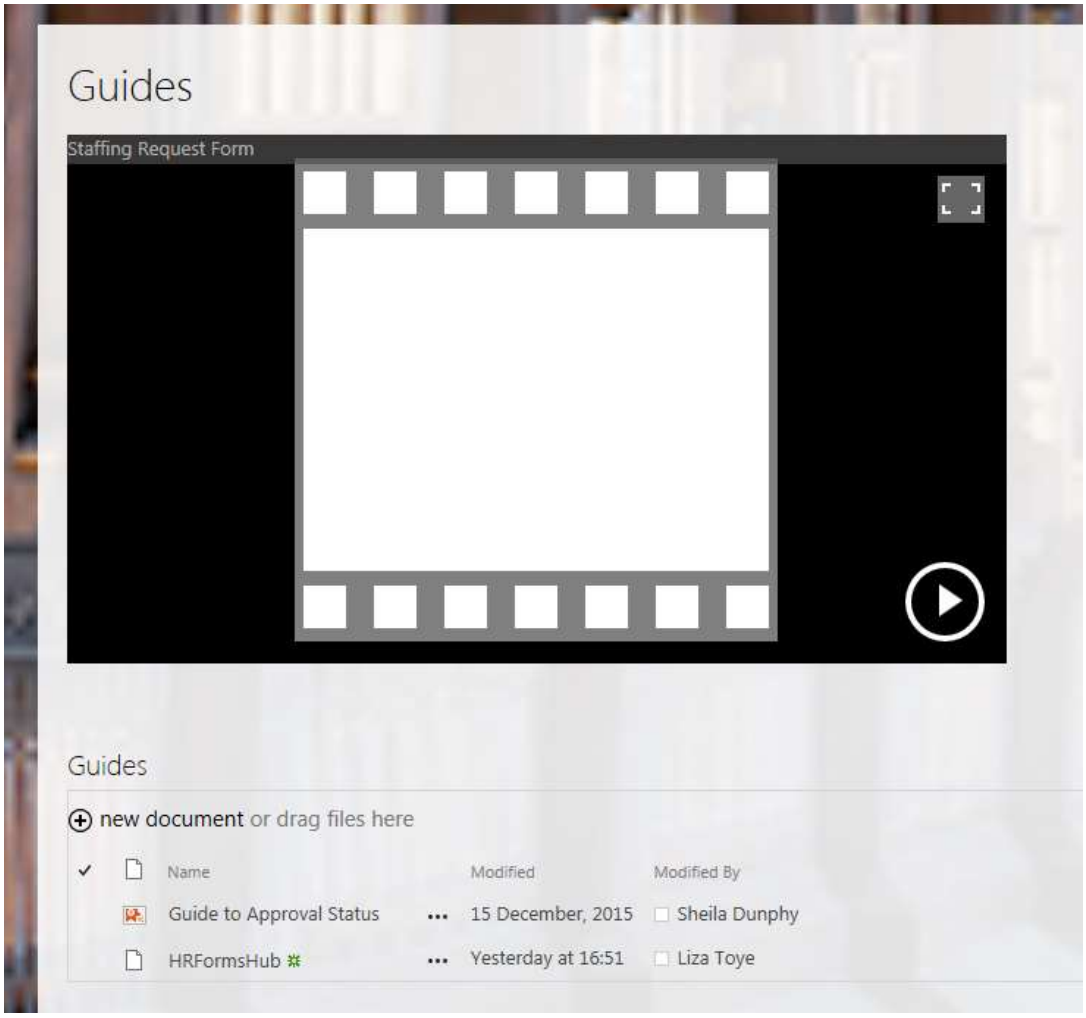
The button that we will be using for the Staff Request process is labelled “Staff Requisition”.

Guides

There is a section for User Guides. We will be building this up as more forms are put into the Forms Hub. Click on Guides:

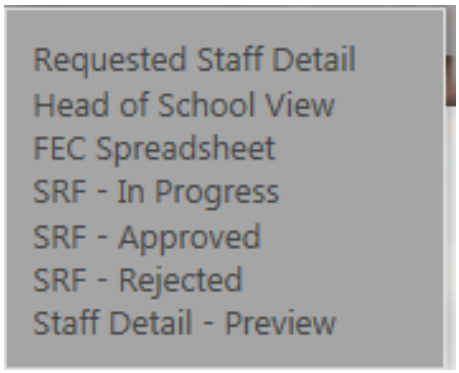


This will open a list of user guides and video guides. The most recent video guide is at the top of the page, ready to view – just click on the Play button.



Staffing Request Home

The Staffing Request Home dropdown list can be used to see the available reports:

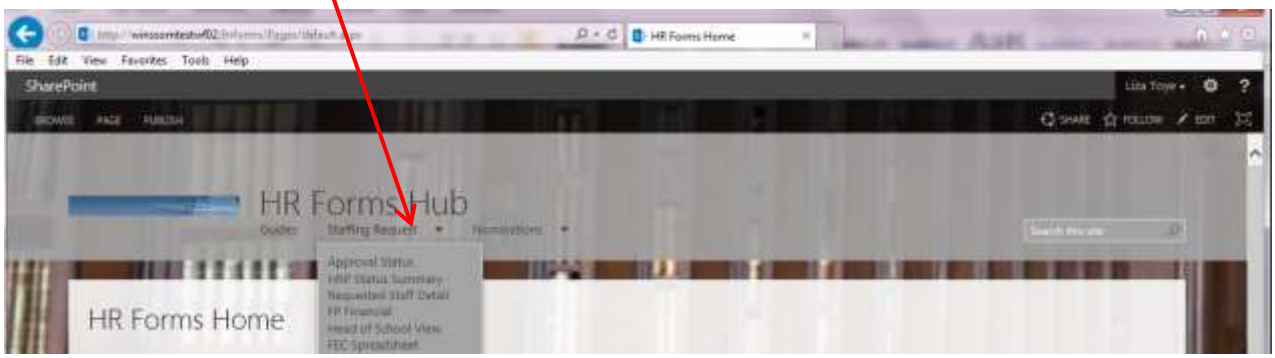


As more online forms and reports are developed, more dropdown lists will appear in this area.

HR Forms Listings – Staffing Request Home

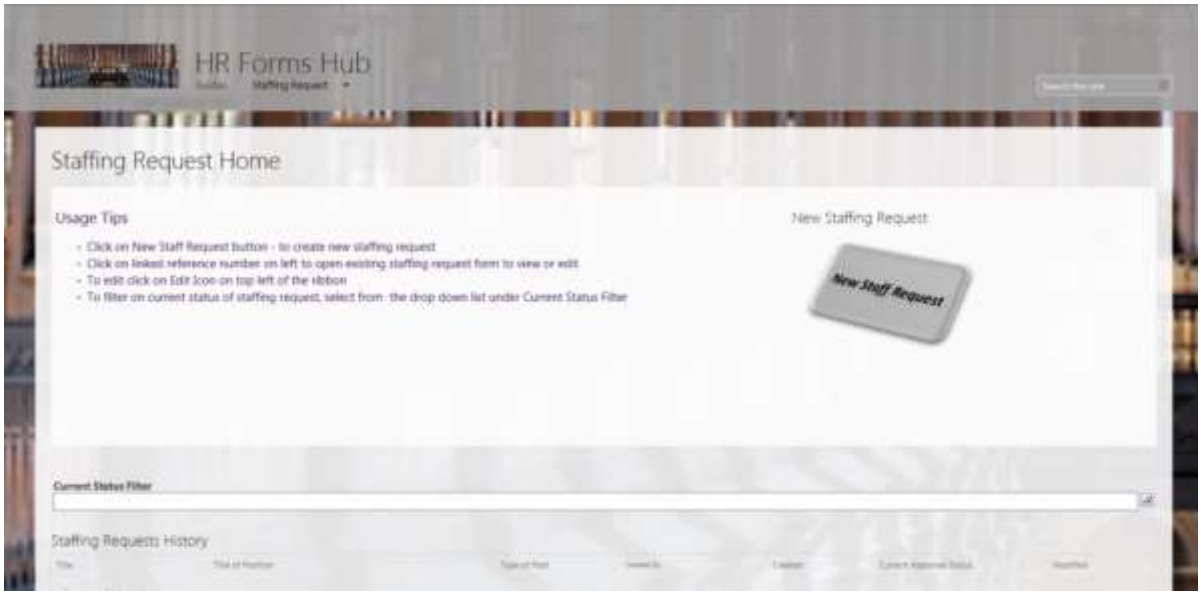
Staffing Requests History

When you click on “Staffing Request”, it opens the Staffing Requests Home page.



You can also click on the Staff Requisition button

This brings you to the Staffing Request Home page:



The Staffing Requests History list shows where your staffing request documents currently are – at what stage in the approval process.

In the example above, we can see that one document is in the Hiring Manager (HM) Draft stage, and one document is at the Senior Lead On Hold stage.

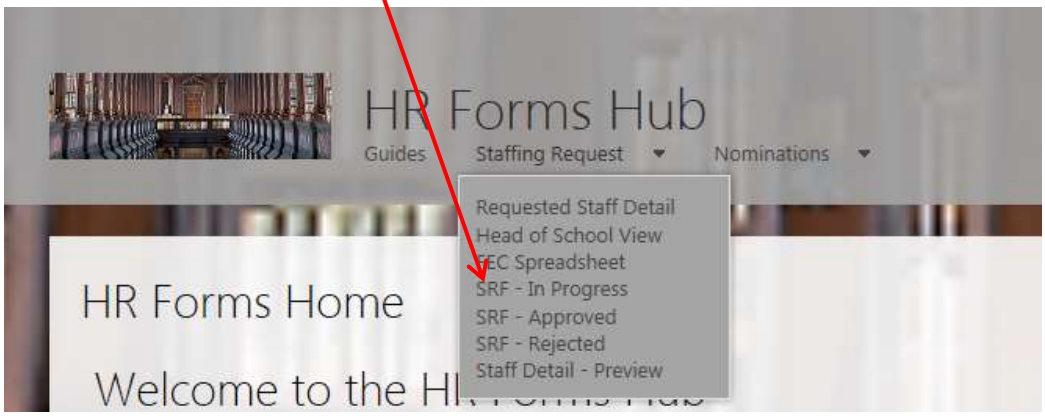
Click on the links on this page (highlighted in blue) to go directly into the forms.

You can begin a new staff request from this page, by clicking on the **New Staff Request** button.

Staffing Request Reports

Approval Status

When you click on “SRF - In Progress” in the Staffing Request list, it opens the SRF – In Progress report.

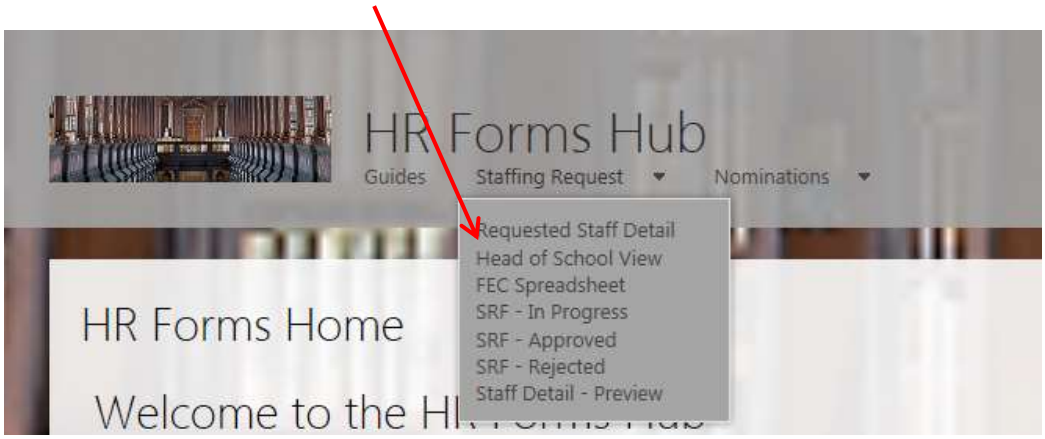


This is a report, showing where your staffing request documents currently are – at what stage in the **approval** process. This page shows more detail than the Staffing Requests History page.

Similarly, if you choose “SRF - Approved” in the Staffing Request list, the SRF – Approved report opens. This report lists the approved documents in more detail than the Staffing Requests History.

Requested Staff Details

When you click on “Requested Staff Detail” it opens a report on all staff requisitions.

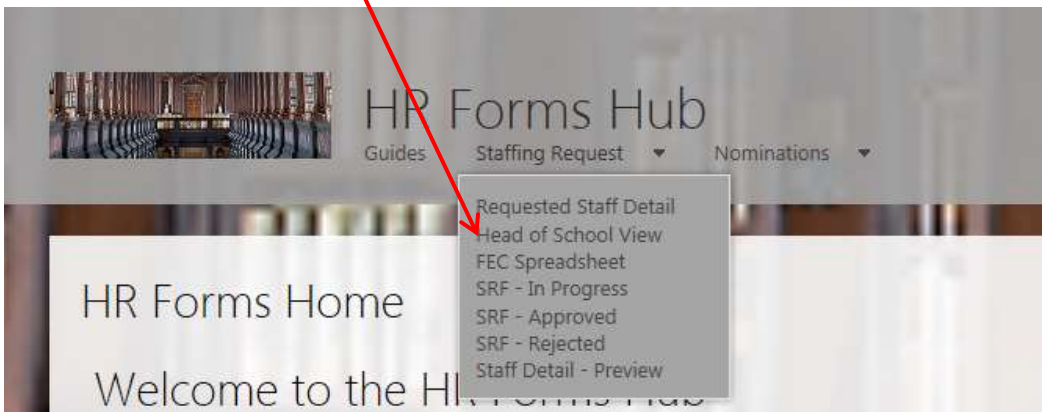


This is a report, showing details of your staffing request documents. This page shows more detail than the Staffing Requests History page.

This report can be exported into Excel by clicking on the Export to Excel button.

Head of School View

When you click on “Head of School View” it opens the Head of School Staff Requisition and Nomination list



This report shows the number of current staffing request documents in the School/Area.

This report can be collapsed/expanded as required.

FEC Spreadsheet

When you click on “FEC spreadsheet” it opens the FEC report.

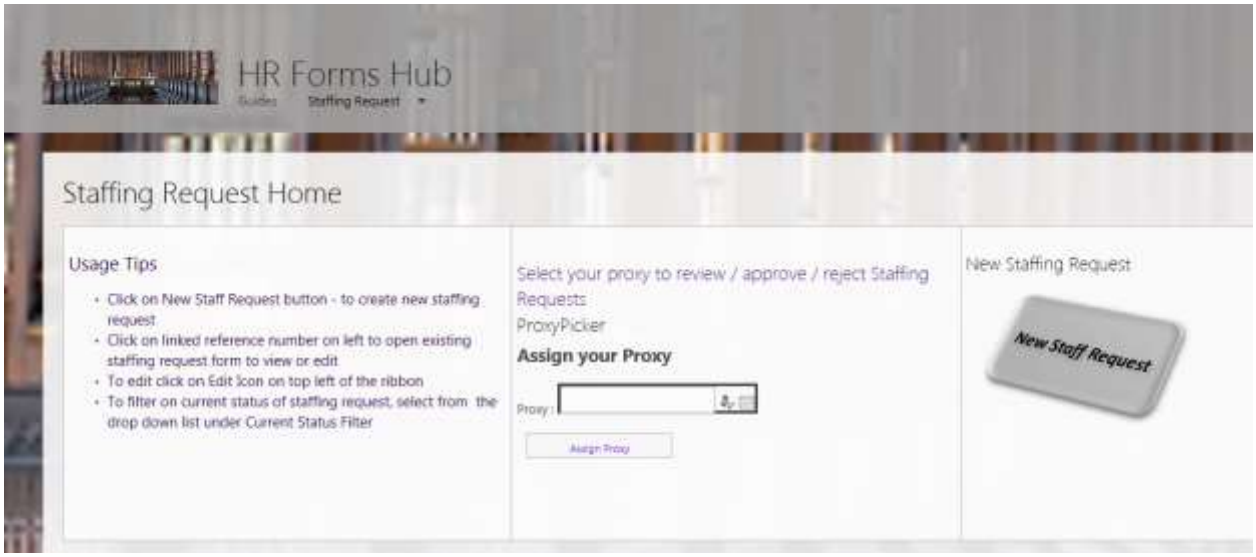
This report is used by the HR Partners to list the approved staffing requests, with the details required by the Faculty Executive Committee. This can be exported to Excel.

Proxies

Setting a Proxy

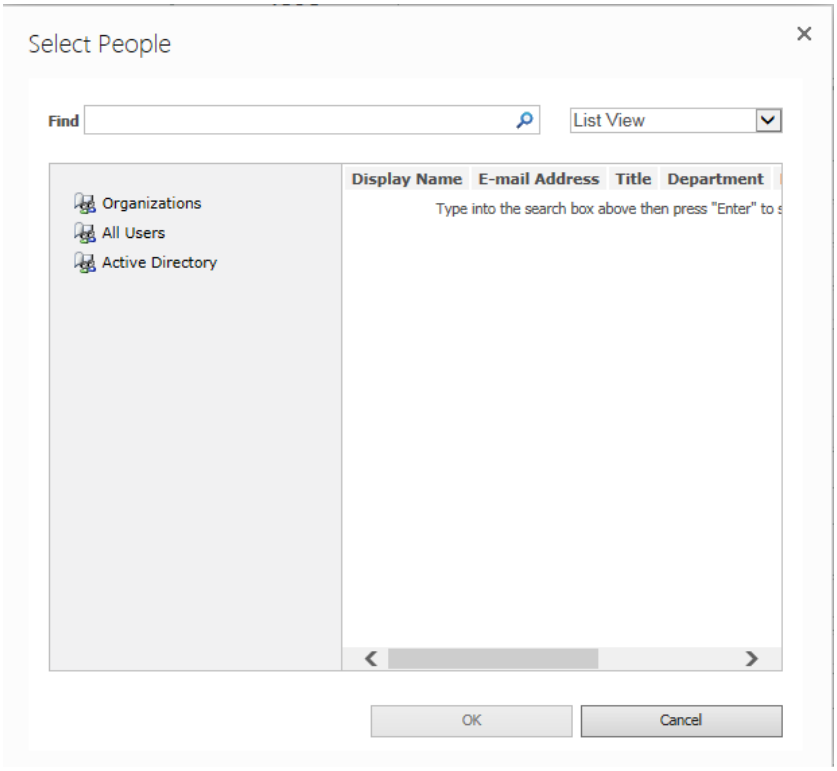
From time to time, a user may wish to nominate someone else to act as their proxy to review / approve / reject Staff Request Forms.

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:

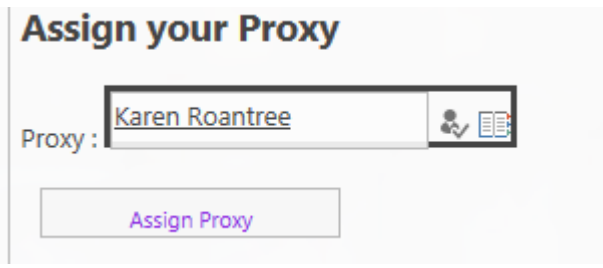
This opens a search facility.



Type in the person's name.

Click on the search button, and then a list of people with that name will appear.

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

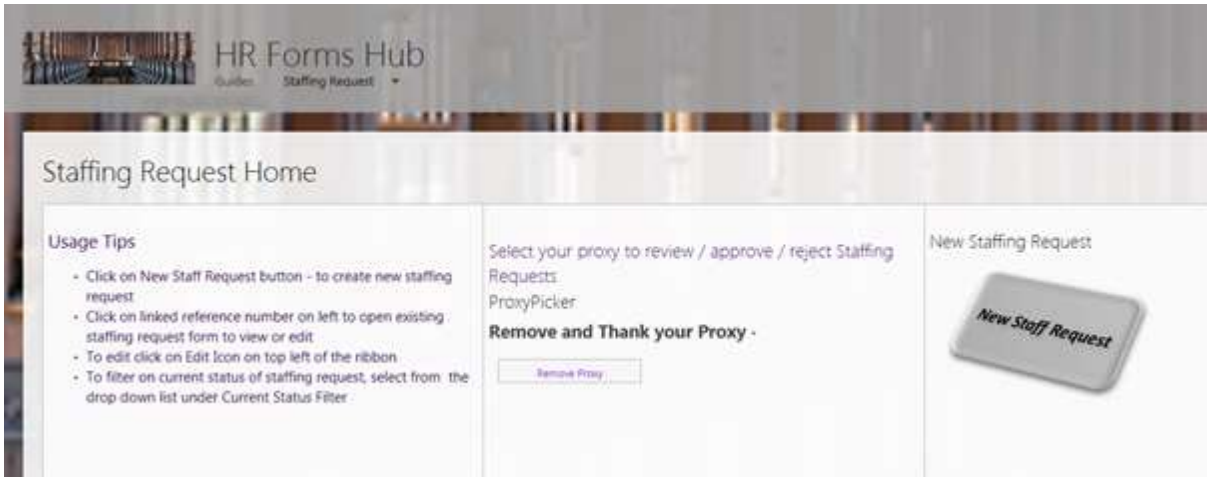


Click on the Assign Proxy button to complete the process

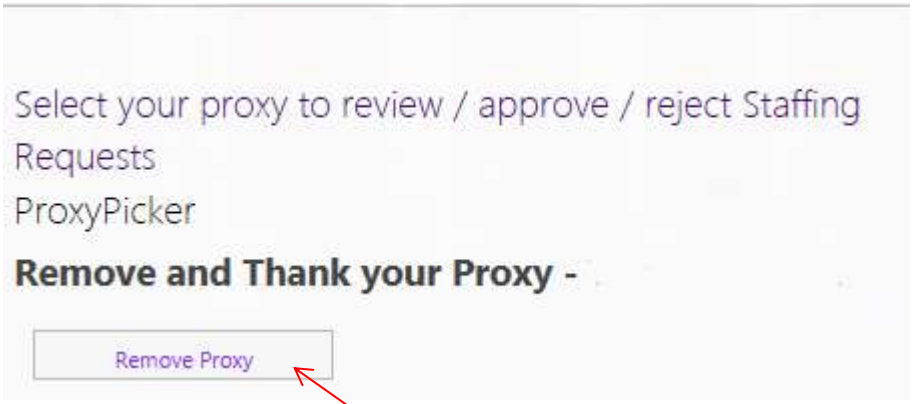
An email will go to your assigned proxy informing them that they are now your proxy for upcoming Staff Request forms.

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

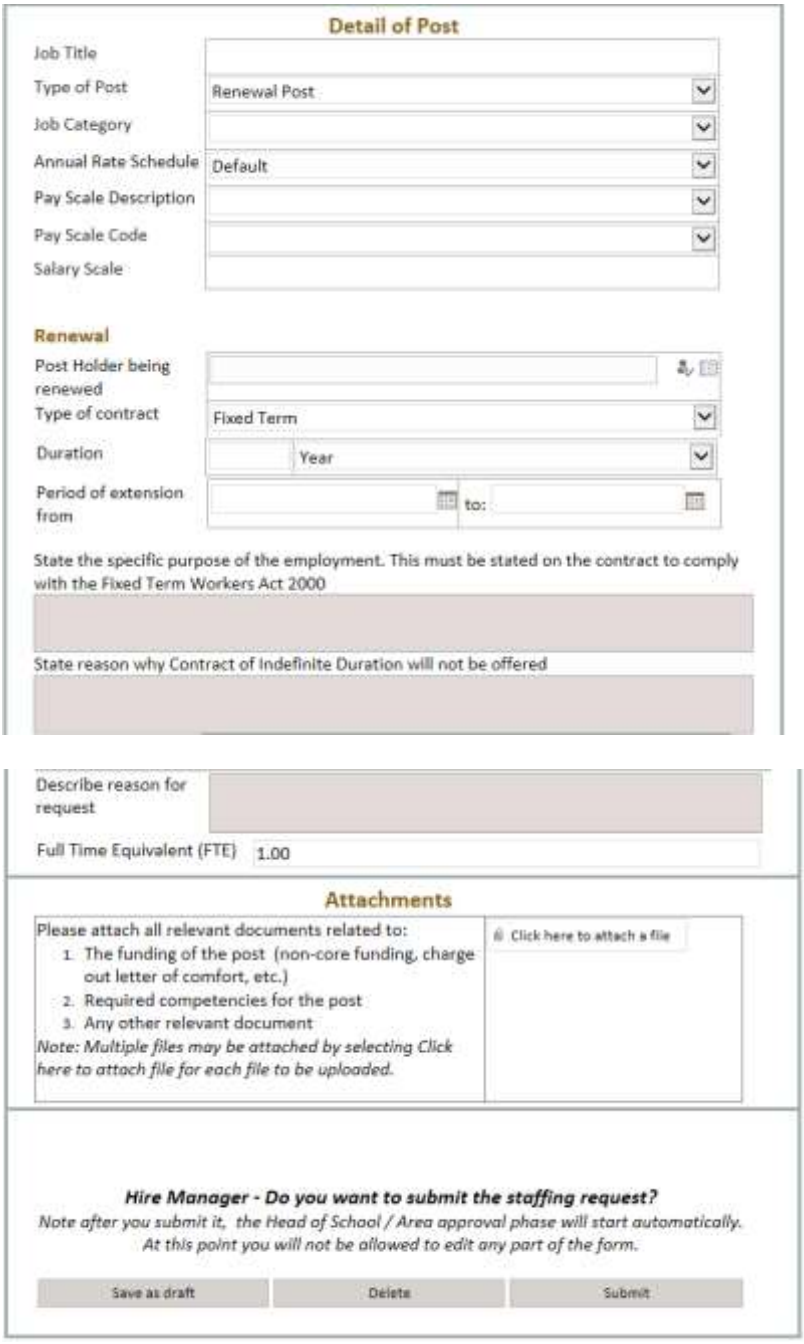
Stage 1 – Hiring Lead

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

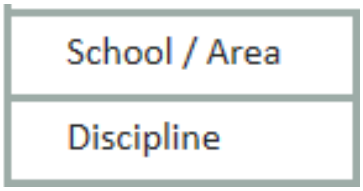
Access to the form

To start the staff request process, the Hiring Lead should go to the HR Forms Hub (http://winssomtestwf02/hrforms) and click on the Staff Requisition button. This brings you to the Staffing Requests Home page, where you can click on the New Staff Request button.

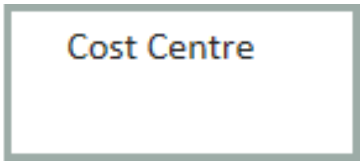
A brand new staffing request form will open, which you can now begin to fill out.


Detail of Post
Job Title
Type of Post
Renewal Post
Job Category
Annual Rate Schedule
Default
Pay Scale Description
Pay Scale Code
Salary Scale
Renewal
Post Holder being renewed
Type of contract
Fixed Term
Duration
Year
Period of extension from
to:
State the specific purpose of the employment. This must be stated on the contract to comply with the Fixed Term Workers Act 2000
State reason why Contract of Indefinite Duration will not be offered
Describe reason for request
Full Time Equivalent (FTE)
1.00
Attachments
Please attach all relevant documents related to:
1. The funding of the post (non-core funding, charge out letter of comfort, etc.)
2. Required competencies for the post
3. Any other relevant document
Note: Multiple files may be attached by selecting Click here to attach file for each file to be uploaded.
Click here to attach a file
Hire Manager - Do you want to submit the staffing request?
Note after you submit it, the Head of School / Area approval phase will start automatically.
At this point you will not be allowed to edit any part of the form.
Save as draft
Delete
Submit

Summary Detail

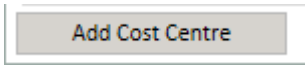


Your **School/Area** and **Discipline** will be automatically filled in. This information is taken from your HR record.



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

If you require a second cost centre, click on the Add Cost Centre button and a second dropdown list will appear.



You can pick up to 4 cost centres in this way.

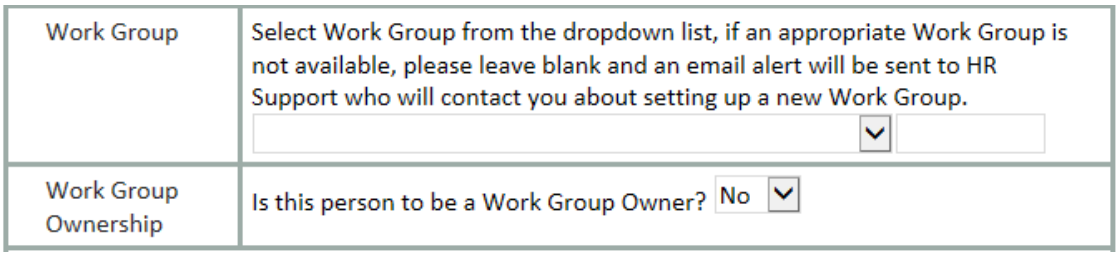
Fill in the **Job Title** and the **Reporting To** fields – these are text fields, 50 characters max.

Work Group

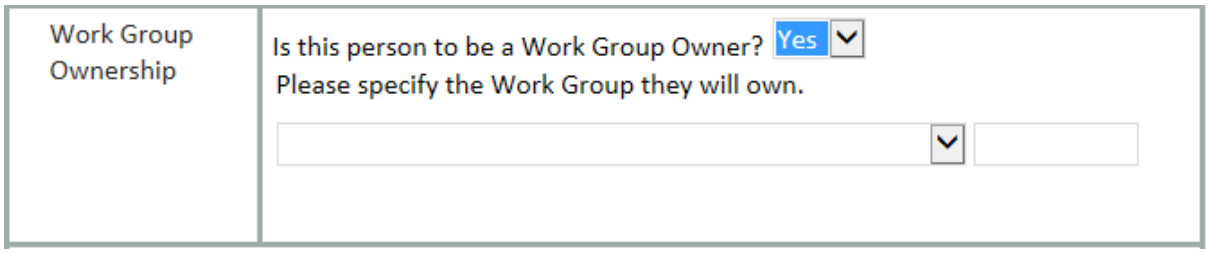
All staff are assigned to a Work Group to allow automation of HR administrative activities (e.g. so email notifications and approvals can be directed to the appropriate person)

What is a **Work Group**? A grouping of employees who report to the same person, the Work Group owner, for HR purposes.

What is a **Work Group Owner**? The owner of a Work Group administers HR related activities for employees in their Work Group such as approving leave requests, managing probations and contract renewals.

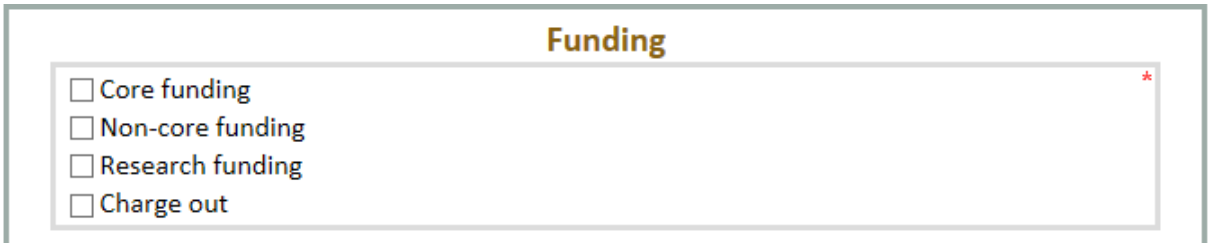


Select the Workgroup from the dropdown list. If you do not select a workgroup, the system assumes that a new workgroup needs to be set up – an email is sent to HR Support who will contact you about setting up a new workgroup. If the workgroup already exists and you leave this blank, the form will take 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 to be work group owner, select Yes from the dropdown. A new field will appear, where you can choose the work group they will own. Note: This is different than the workgroup that they are a member of. For example, the HRIS Manager is a *member* of the HR Services workgroup, but is the *owner* of the HRIS team.

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. You may also refer to the Appendix 1 "Source of Funds Codes" which gives a quick overview of these codes.

What do I do if a different department or area within College is funding the post I wish to recruit?

> If, for example, another school/area wishes to the fund the post, it is good HR practice to ensure clarity around roles. In this example, if the person is reporting to you in your school or area, you should make arrangements with the relevant Finance Partners to have the monies reallocated into the appropriate account. If you are recruiting the person and they will not report to you, it is not appropriate for you to do the hiring and the person to whom they will report should fill in the online form with the appropriate cost code.

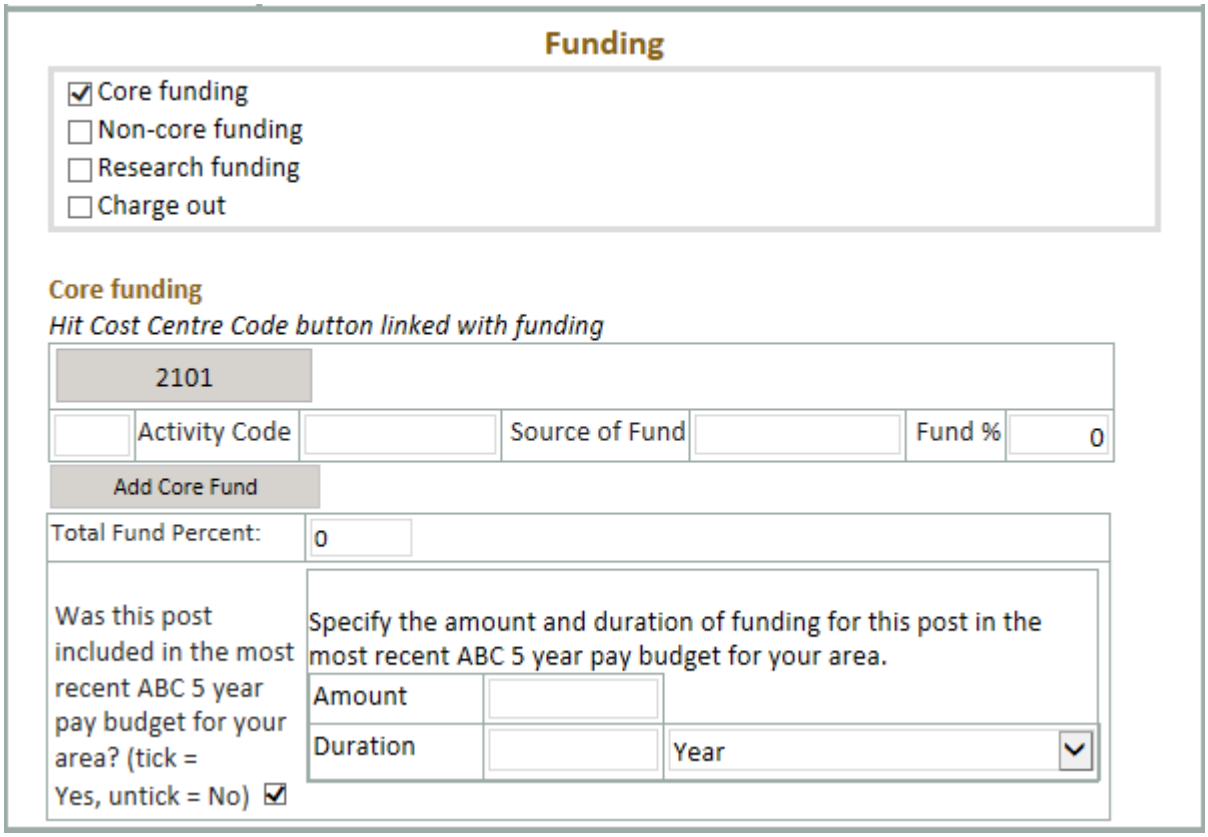
Type of Funding

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.

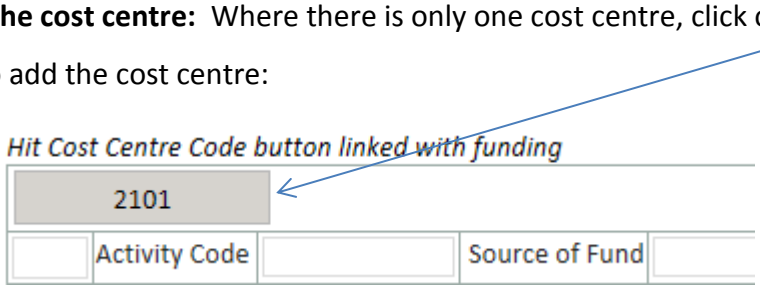
Note: the "Fund %" field is a mandatory field - because a request can be funded from more than one source, you are required to fill in the percentage funded from each source and the system will total all of the percentages to check that they add up to 100%.

Core Funding

For Core funding you need to identify the cost centre, activity code, source of funds, 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 in the ABC:

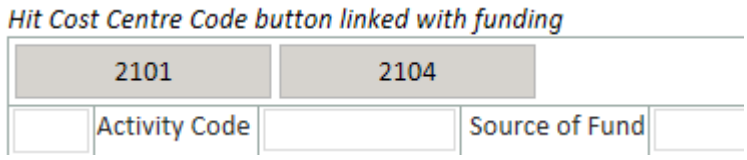


Identify the cost centre: Where there is only one cost centre, click on Cost Centre Code button to add the cost centre:



The Cost Centre will go into the required field:

If there is more than one cost centre, you will need to identify which cost centre will be linked to this funding source. Select the Cost Centre Code button you require:

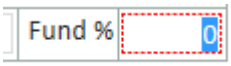


The Cost Centre will go into the required field:

Type in the seven-digit **activity code**

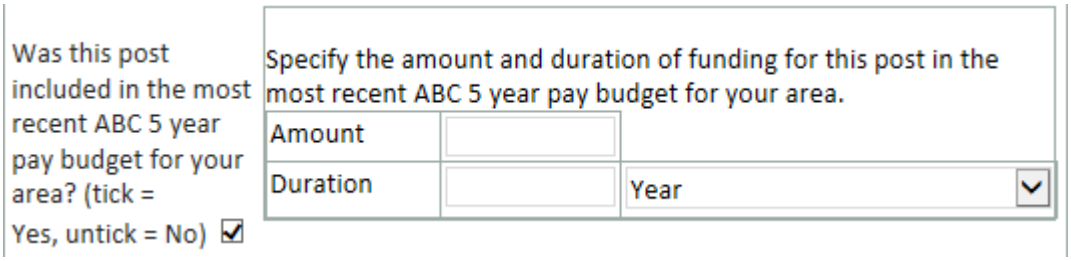
The **source of funds** dropdown will automatically populate with "1112"

Type in the **percentage funded** from that source. This is a required field.

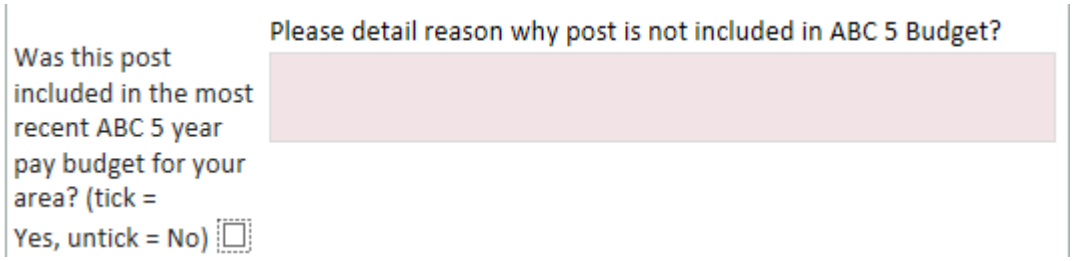


ABC 5 year pay budget: You must identify whether the post was included in the ABC 5 year forecast and the details of the funding if it is included in the ABC:

If yes:

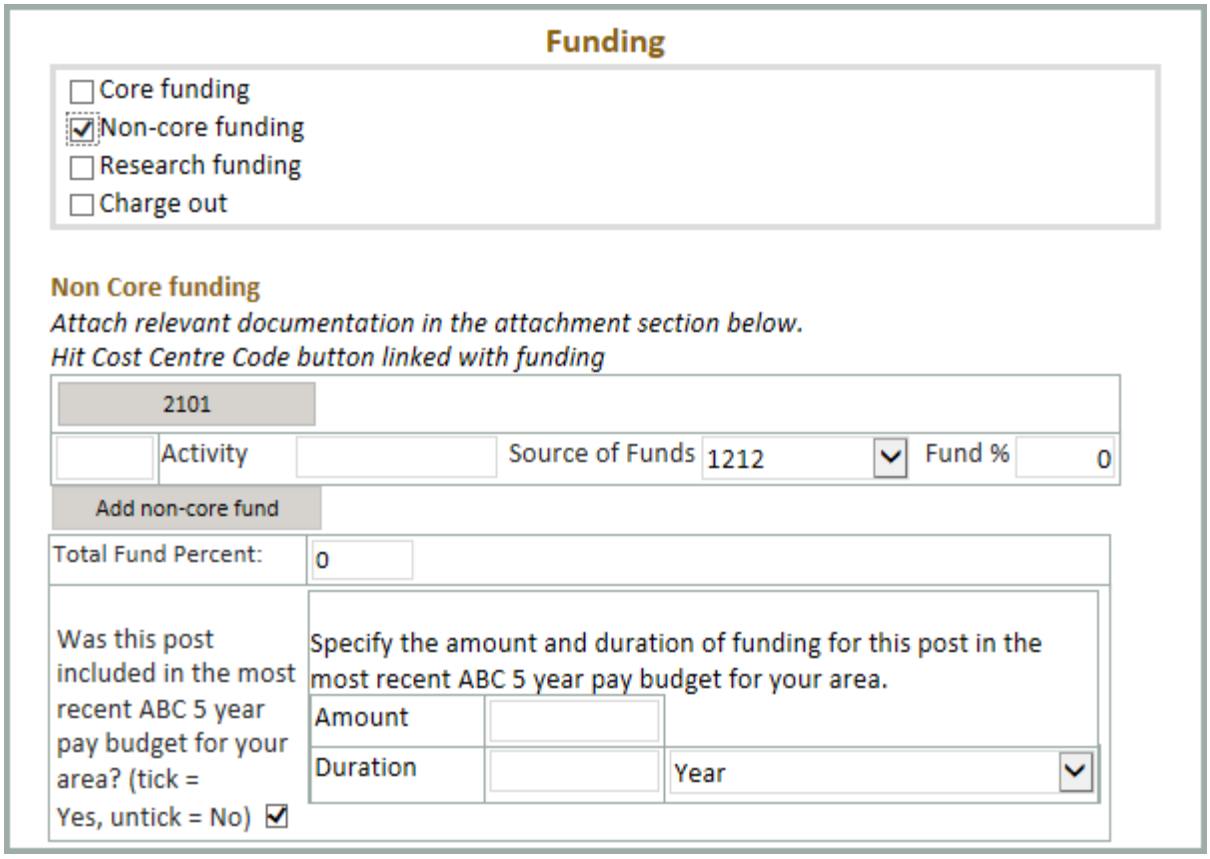


If no:

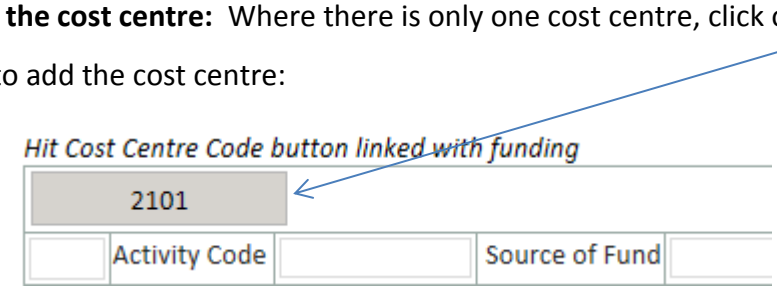


Non-Core Funding

For Non-Core funding you need to identify the cost centre code, activity code, source of funds, 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 in the ABC:

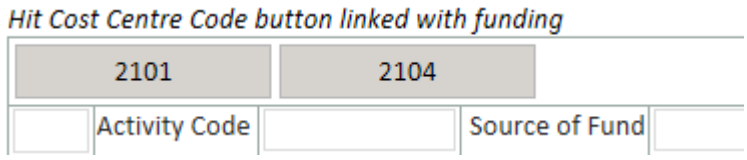


Identify the cost centre: Where there is only one cost centre, click on Cost Centre Code button to add the cost centre:



The Cost Centre will go into the required field:

If there is more than one cost centre, you will need to identify which cost centre will be linked to this funding source. Select the Cost Centre Code button you require:

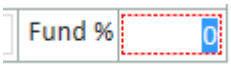


The Cost Centre will go into the required field:

Type in the seven-digit **activity code**

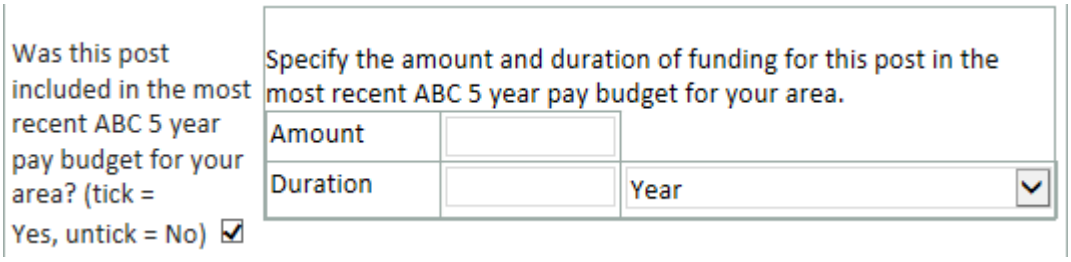
Choose the **source of funds** from the dropdown list: 1212 (Exchequer funded) or 3100 (non-Exchequer funded)

Type in the **percentage funded** from that source. This is a required field.

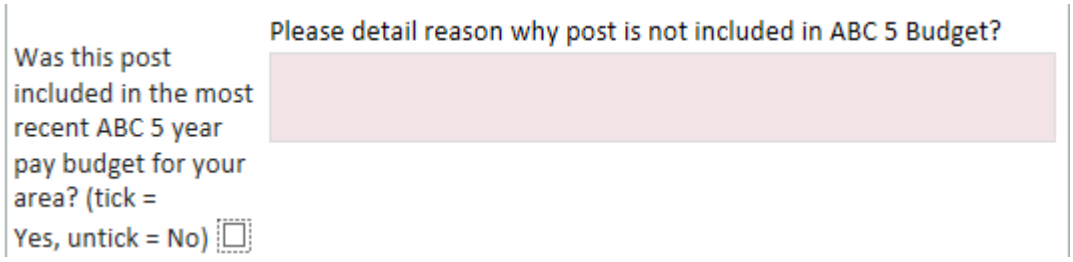


ABC 5 year pay budget: You must identify whether the post was included in the ABC 5 year forecast and the details of the funding if it is included in the ABC:

If yes:

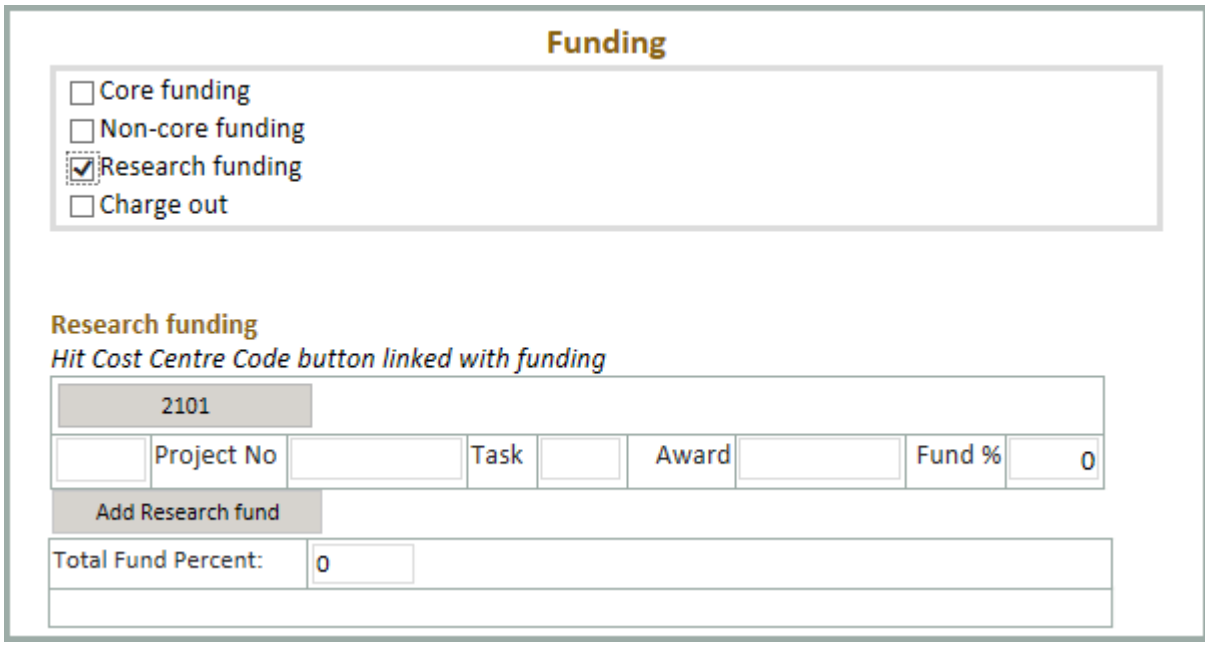


If no:

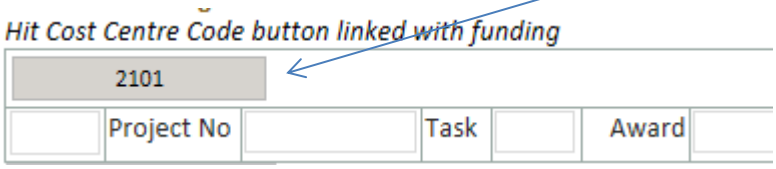


Research Funding

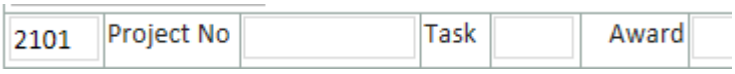
For Research funding you need to identify the Cost Centre, Project Number, Award number and the percentage funded from that source.



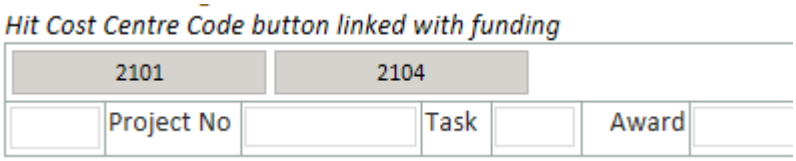
Identify the cost centre: Where there is only one cost centre, click on Cost Centre Code button to add the cost centre:



The Cost Centre will go into the required field:



If there is more than one cost centre, you will need to identify which cost centre will be linked to this funding source. Select the Cost Centre Code button you require:



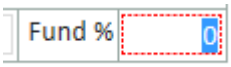
The Cost Centre will go into the required field:

Type in the six- digit **Project Number**.

The **Task** field will automatically populate with "01"

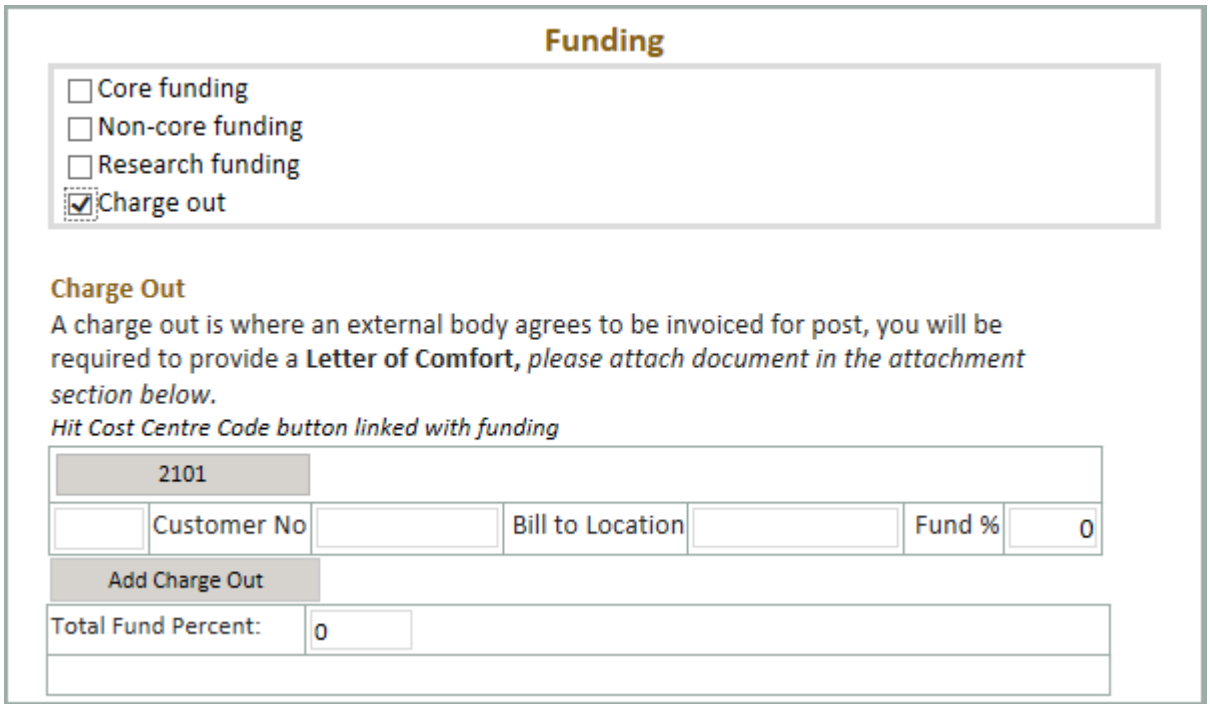
Type in the five-digit **Award** number.

Type in the **percentage funded** from that source. This is a required field.

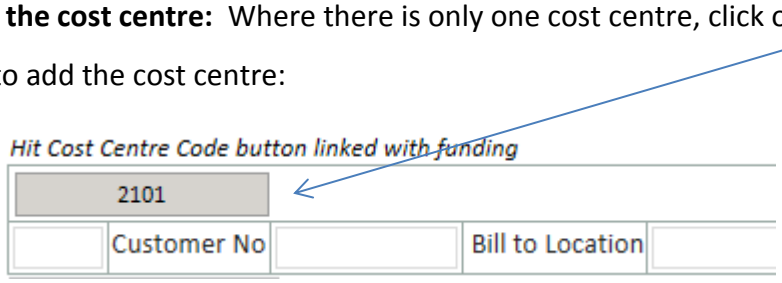


Charge Out

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.

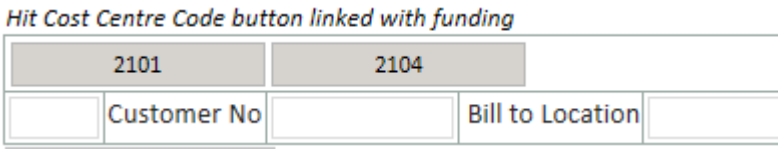


Identify the cost centre: Where there is only one cost centre, click on Cost Centre Code button to add the cost centre:



The Cost Centre will go into the required field:

If there is more than one cost centre, you will need to identify which cost centre will be linked to this funding source. Select the Cost Centre Code button you require:

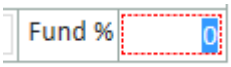


The Cost Centre will go into the required field:

Type in the six-digit **Customer Number**

Type in the seven-digit **Bill to Location** number

Type in the **percentage funded** from that source. This is a required field.



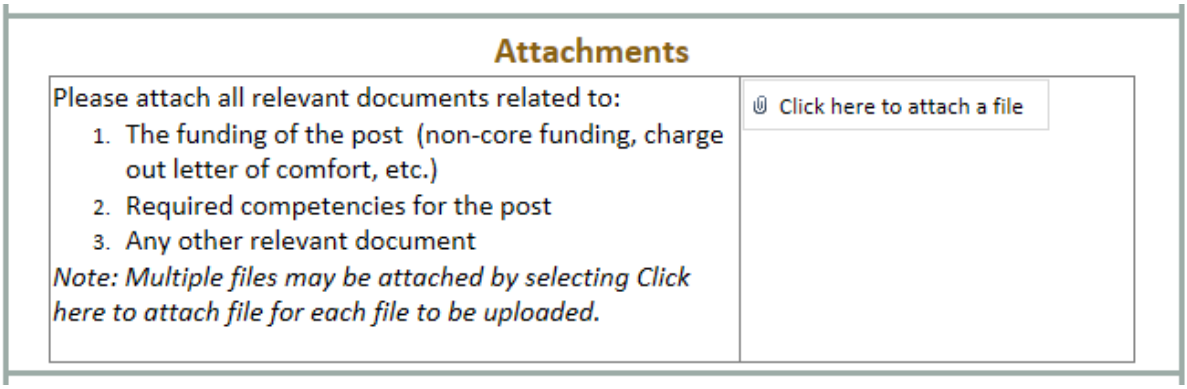
For more information on Charge Out funding, please contact your HR Partner.

Funding Information

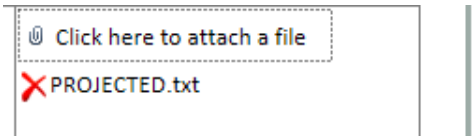
For all cases, you may add more than one source of funds. Click on the Add funding button (Add Core Fund, Add Non-core funding, Add Research funding, Add Charge Out); this will allow you to put in additional sources of funds.

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

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.



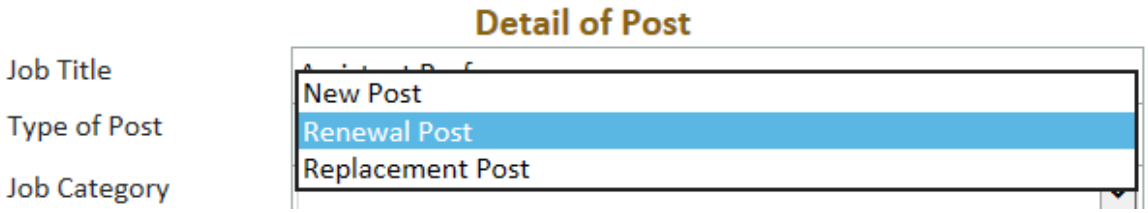
You will be able to see the list of attachments. Click on the red X to remove them, if required:



Detail of Post: New Post / Renewal / Replacement

There are several parts to the Detail of Post section. This form will look differently depending on the choices made during the process (for example, type of post – Renewal, Replacement or New Post).

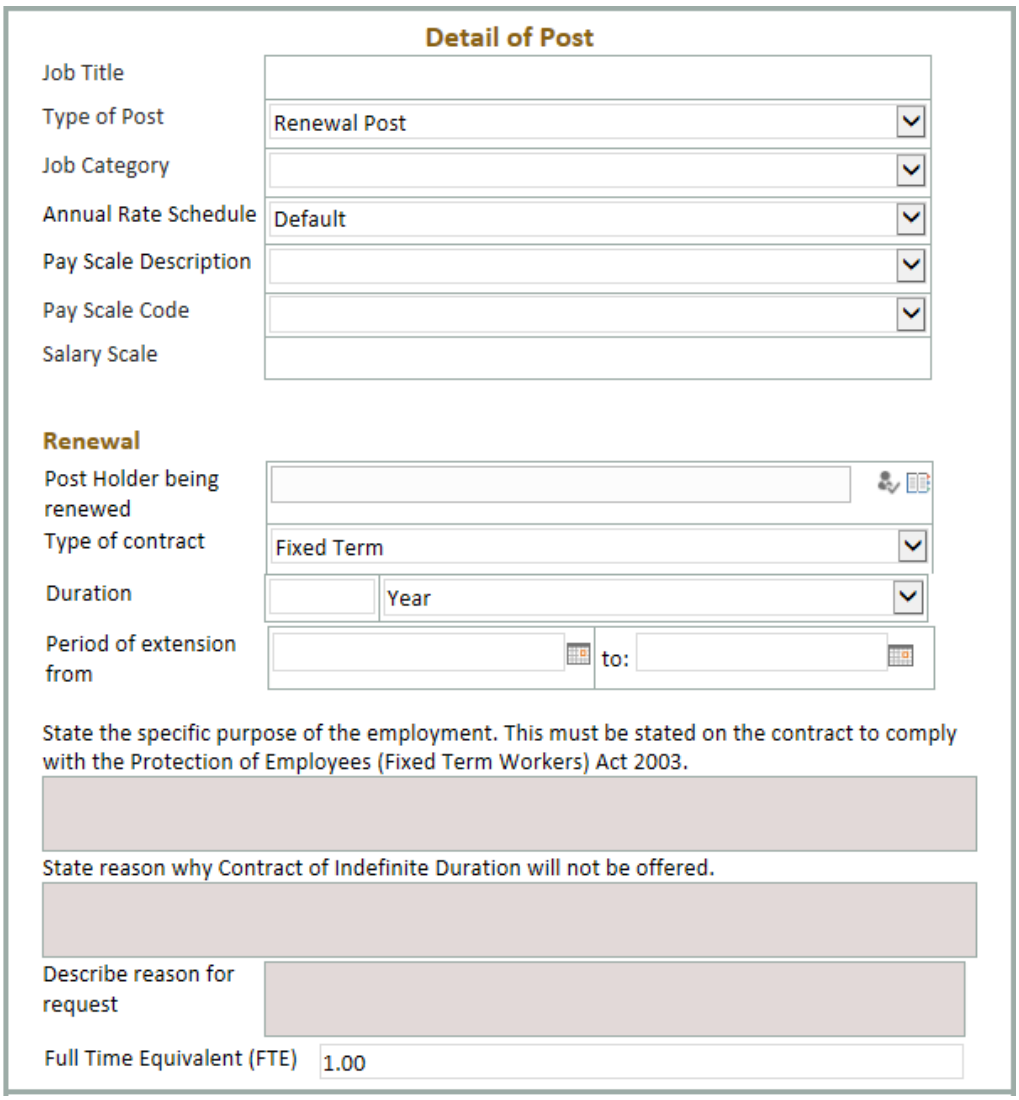
Under Type of post, you may choose from three:



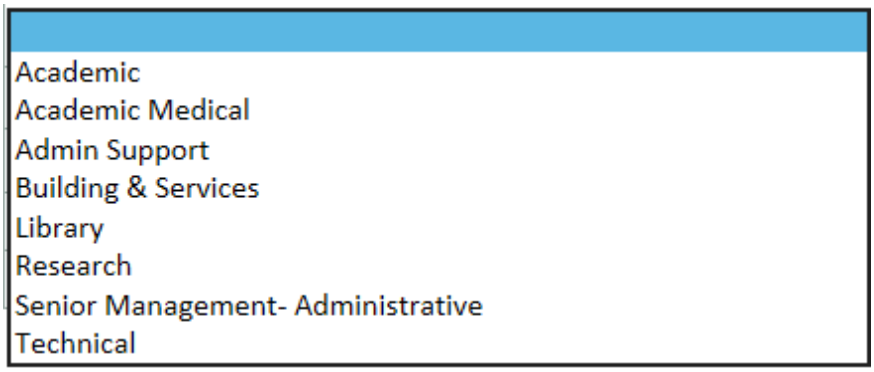
Each of these types of posts has fields which must be filled in accordingly.

Renewal

This is the default value, as it is used most frequently.

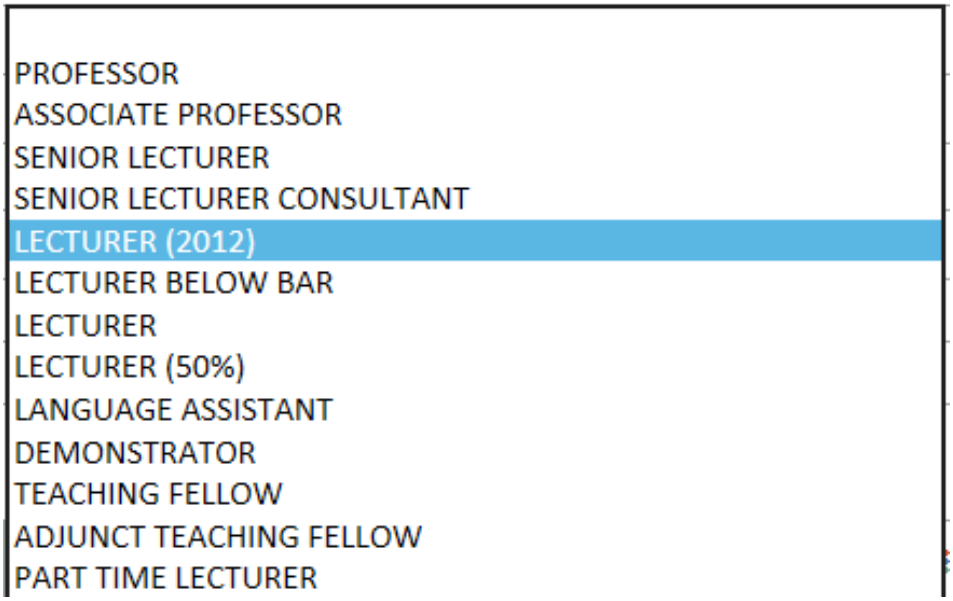


Job Category: Select the appropriate job category



Annual Rate Schedule: as a rule, you will choose the Default rate schedule. Some staff may be on an earlier rate (pre-Croke Park pay scales), and in this case you would choose "All".

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



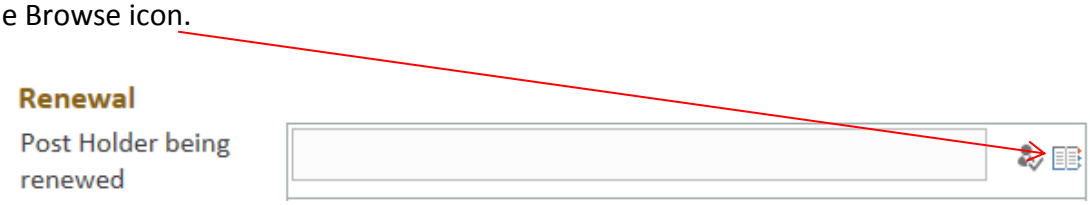
Note: the Pay Scale Descriptions are distinct from Job Titles and as such are comparable to the older names for Academic posts.

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

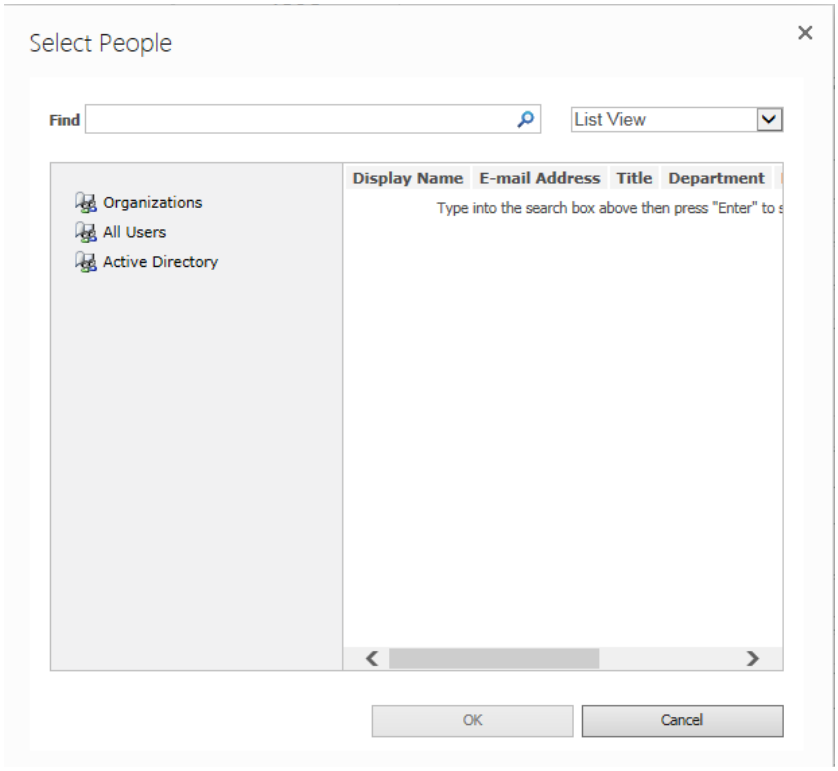
The pay scale range will automatically populate.

If you are unclear which Annual Rate Schedule, Pay Scale Description or Pay Scale Code to choose, your Faculty/Division HR Partner should be able to help.

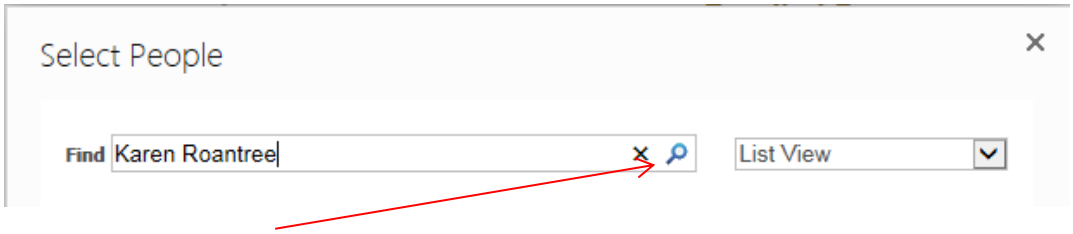
Post Holder being renewed: SharePoint should be able to find the person for you. Click on the Browse icon.



This opens a search facility.



Type in the person's name.



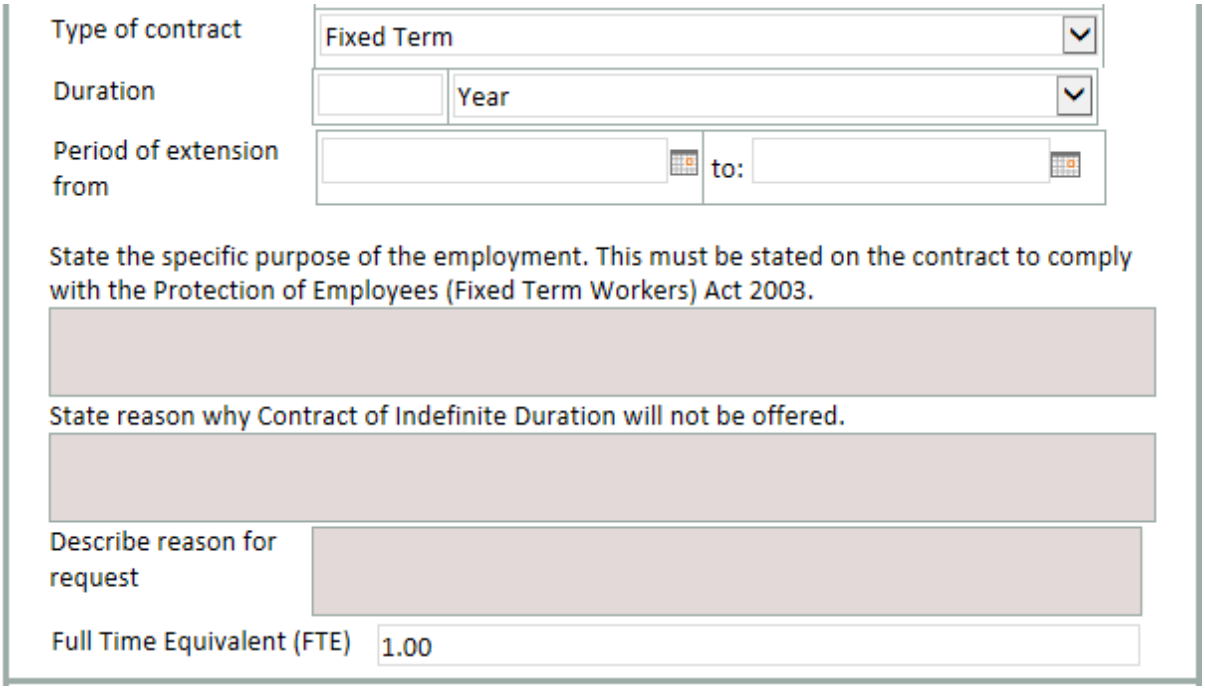
Click on the search button, and then a list of people with that name will appear.

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

Type of contract: Select the appropriate contract type

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.

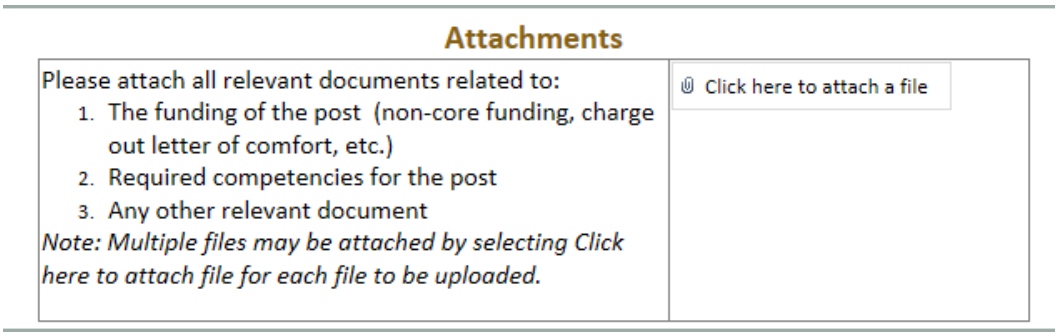


For more information on Fixed Term and Specific Purpose contracts, please refer to the HR "Guide to the Management of Temporary Employment" which can be found on the HR website (www.tcd.ie/hr).

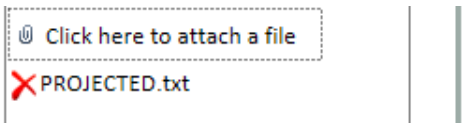
For Permanent and Indefinite Duration contracts, only the reason for the request question will appear.

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.

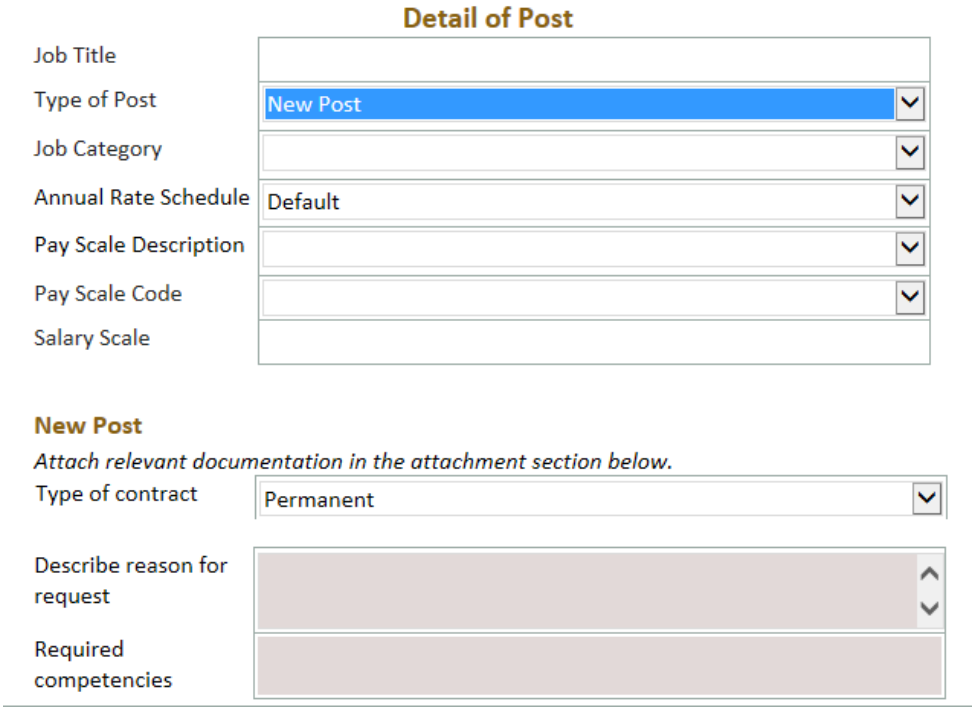
Attachments: Use the attachments section if you have any documents which should be attached to the request.



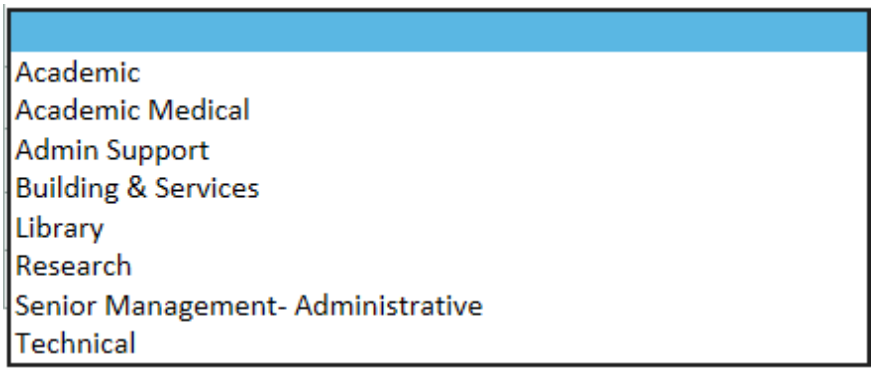
You will be able to see the list of attachments. Click on the red X to remove them, if required:



New Post

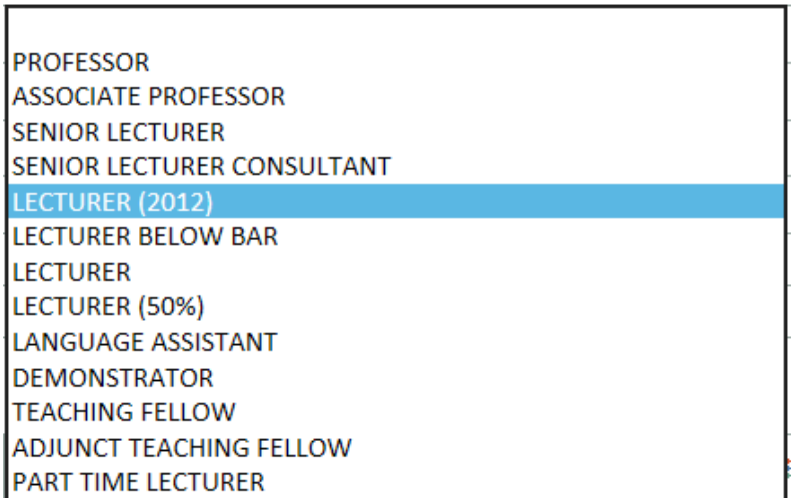


Job Category: Select the appropriate job category



Annual Rate Schedule: as a rule, you will choose the Default rate schedule. Some staff may be on an earlier rate (pre-Croke Park payscales), and in this case you should choose "All".

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



Note: the Pay Scale Descriptions are distinct from Job Titles and as such are comparable to the older names for Academic posts.

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

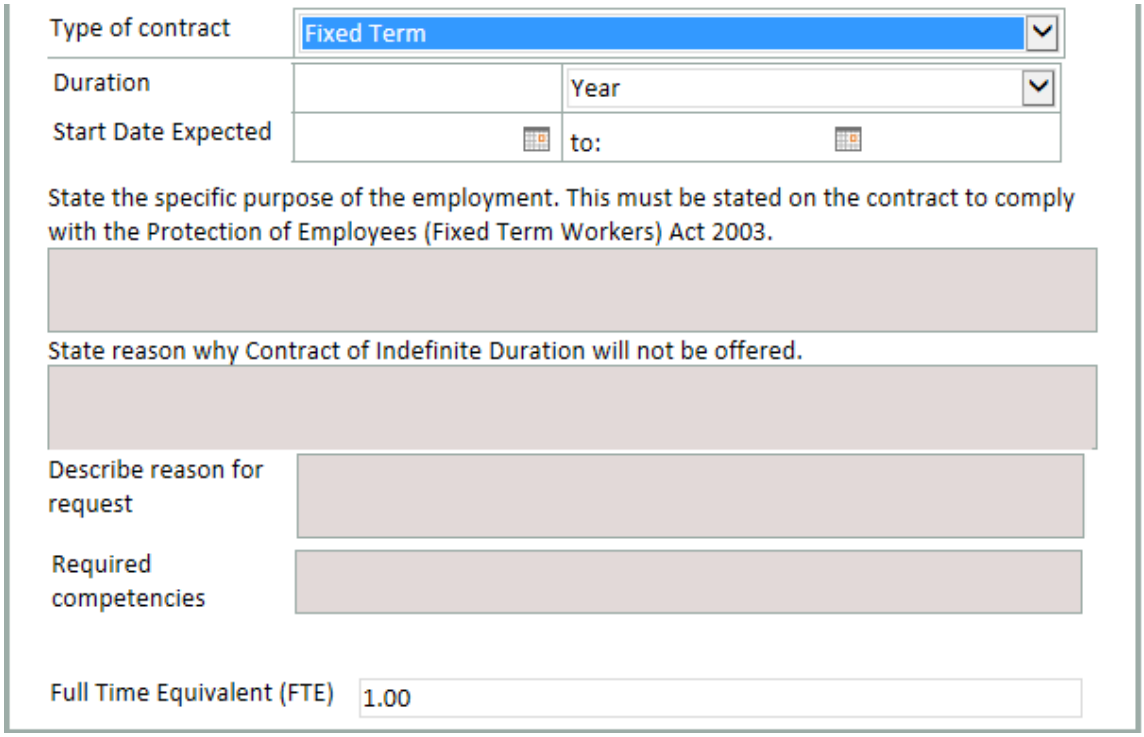
The pay scale range will automatically populate.

If you are unclear which Annual Rate Schedule, Pay Scale Description or Pay Scale Code to choose, your Faculty/Division HR Partner should be able to help.

Contract Type: Select the appropriate contract type

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) the reason for the request.



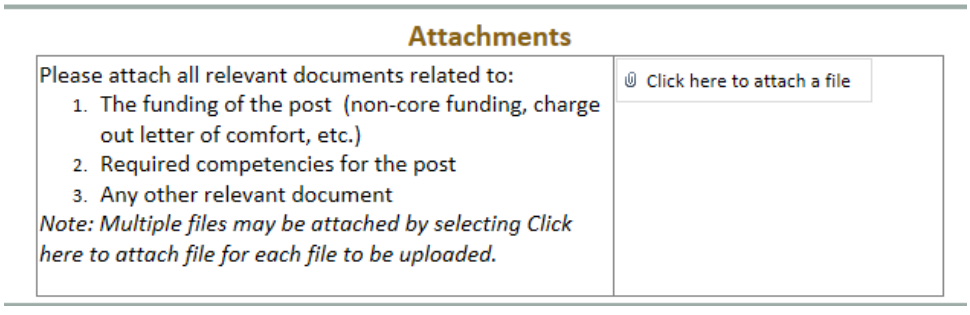
For more information on Fixed Term and Specific Purpose contracts, please refer to the HR "Guide to the Management of Temporary Employment" which can be found on the HR website (www.tcd.ie/hr).

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

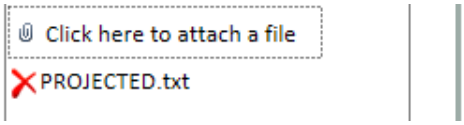
Required Competencies: Fill in the required competencies for the post. If this text is quite long, or if you are providing a Job Description, you can add an attachment instead.

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.

Attachments: Use the attachments section if you have any documents which should be attached to the request.



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



Replacement

Detail of Post

Job Title	
Type of Post	Replacement Post
Job Category	
Annual Rate Schedule	Default
Pay Scale Description	
Pay Scale Code	
Salary Scale	

Replacement

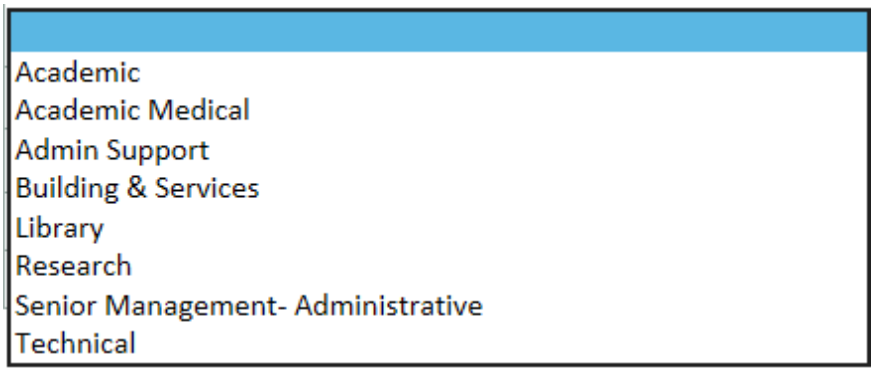
Replacement type	Resignation		
Name of the previous post holder			
Type of contract	Fixed Term		
Duration		Year	
Start date expected		End date expected	

State the specific purpose of the employment. This must be stated on the contract to comply with the Protection of Employees (Fixed Term Workers) Act 2003.

State reason why Contract of Indefinite Duration will not be offered.

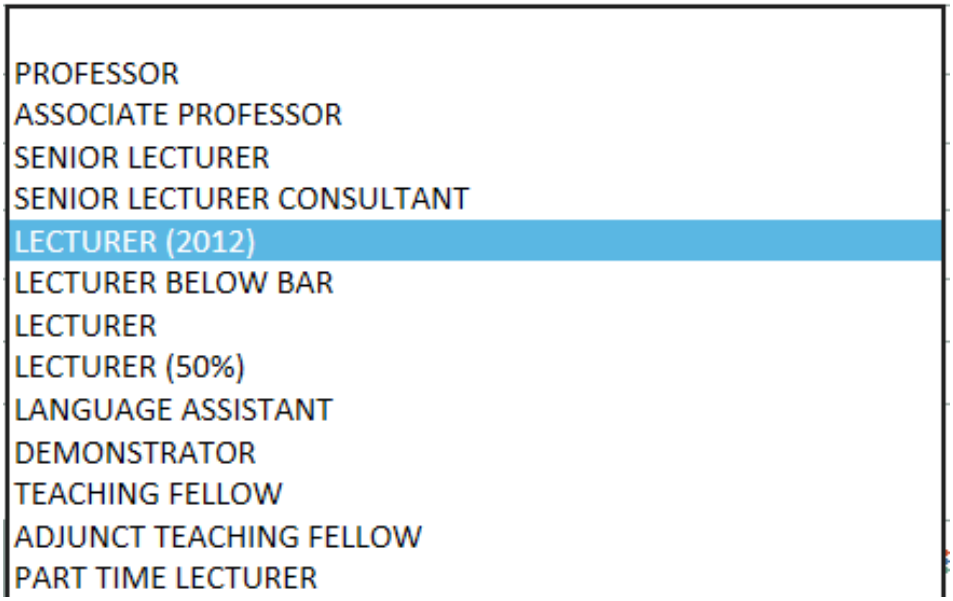
Describe reason for request	
Required competencies	
Full Time Equivalent (FTE)	1.00

Job Category: Select the appropriate job category



Annual Rate Schedule: as a rule, you will choose the Default rate schedule. Some staff may be on an earlier rate (pre-Croke Park payscales), and in this case you should choose "All".

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



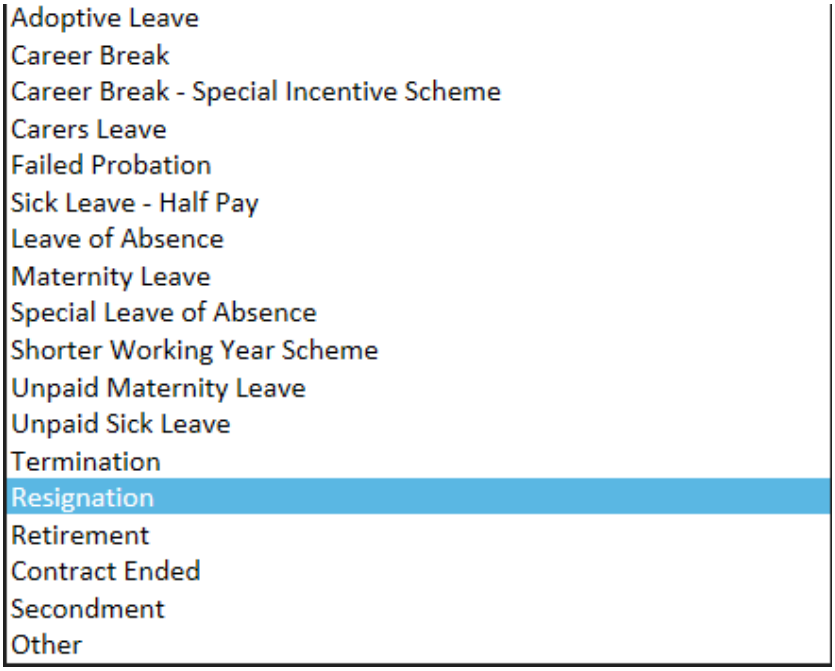
Note: the Pay Scale Descriptions are distinct from Job Titles and as such are comparable to the older names for Academic posts.

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

The pay scale range will automatically populate.

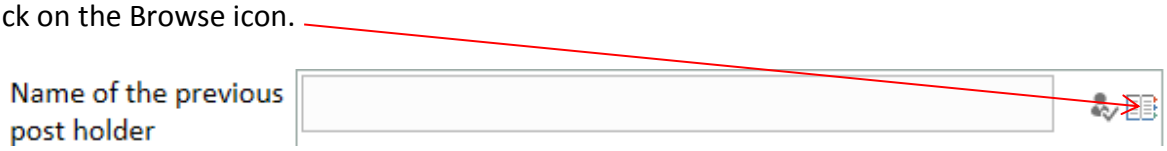
If you are unclear which Annual Rate Schedule, Pay Scale Description or Pay Scale Code to choose, your Faculty/Division HR Partner should be able to help.

Replacement Type: Choose from the dropdown list.

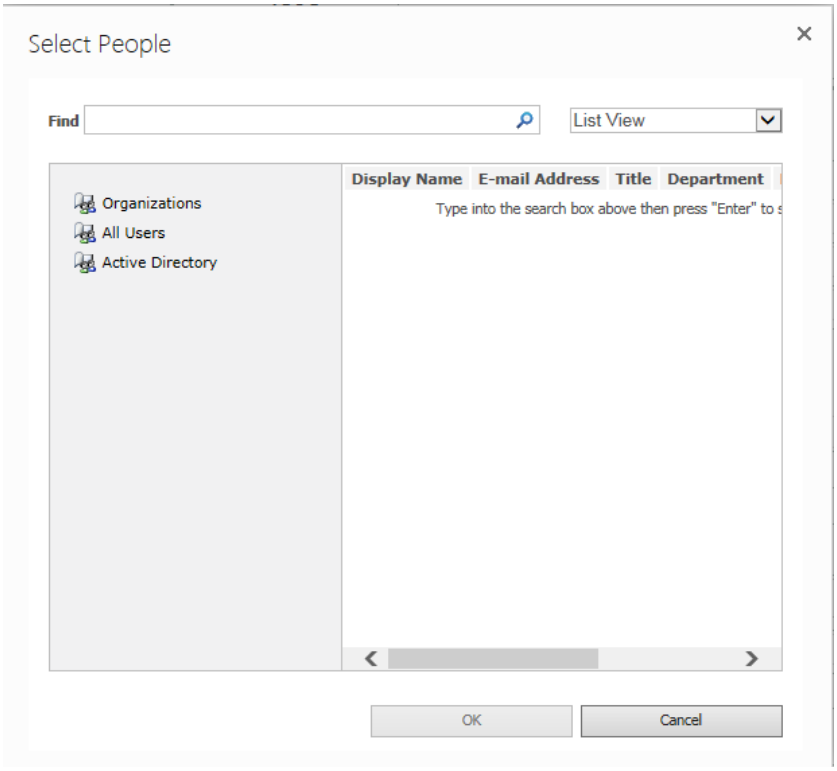


Name of the previous post holder: SharePoint should be able to find the person for you.

Click on the Browse icon.



This opens a search facility.



Type in the person's name.

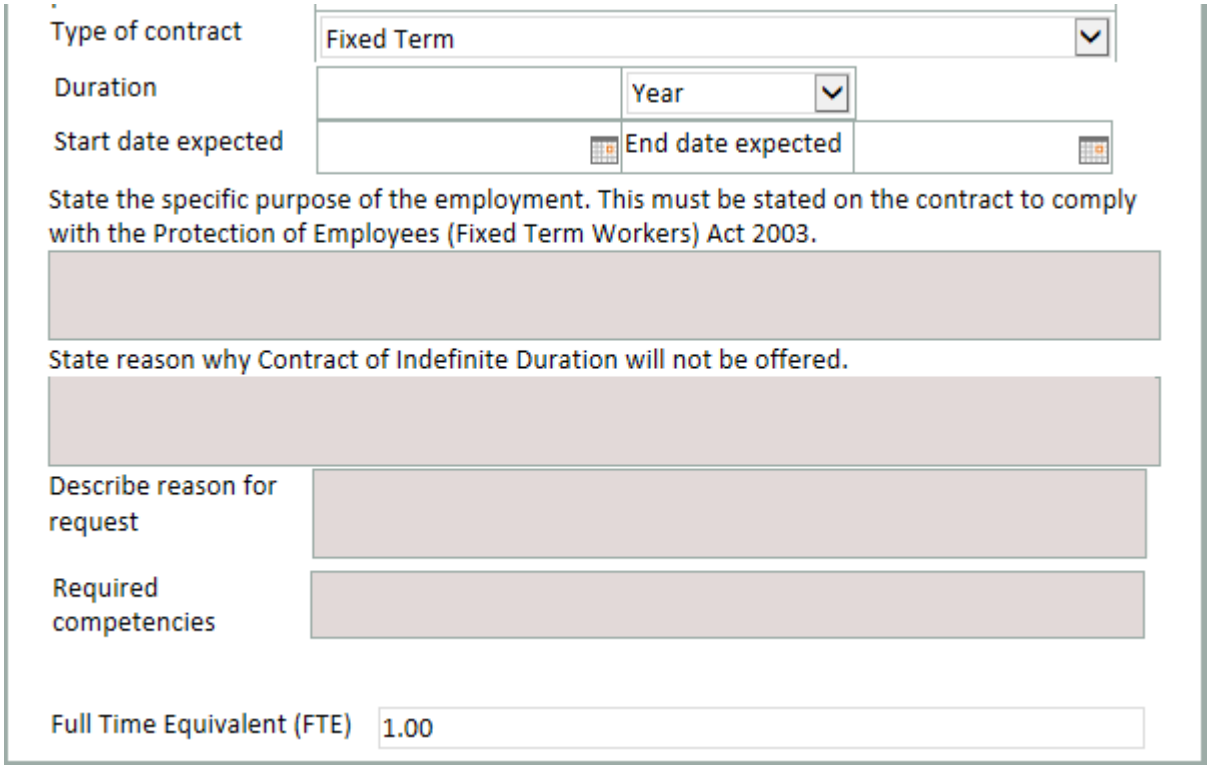
Click on the search button, and then a list of people with that name will appear.

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

Type of contract: Select the appropriate contract type

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) the contract purpose, 3) contract dates, 4) specific purpose of the employment and 5) reasons why contract of Indefinite Duration will not be offered.



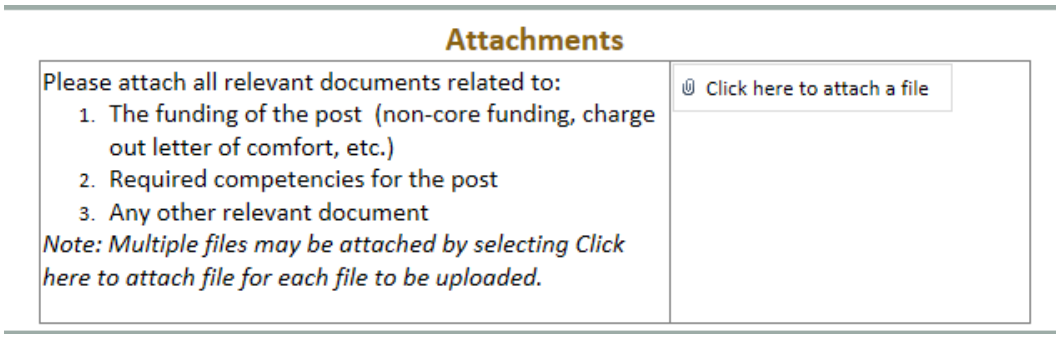
For more information on Fixed Term and Specific Purpose contracts, please refer to the HR "Guide to the Management of Temporary Employment" which can be found on the HR website (www.tcd.ie/hr).

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

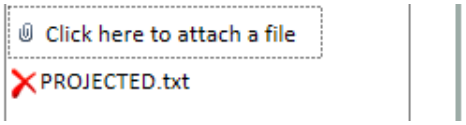
Required competencies: Fill in the required competencies for the post. If this text is quite long, or if you are providing a Job Description, you can add an attachment instead.

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.

Attachments: Use the attachments section if you have any documents which should be attached to the request.

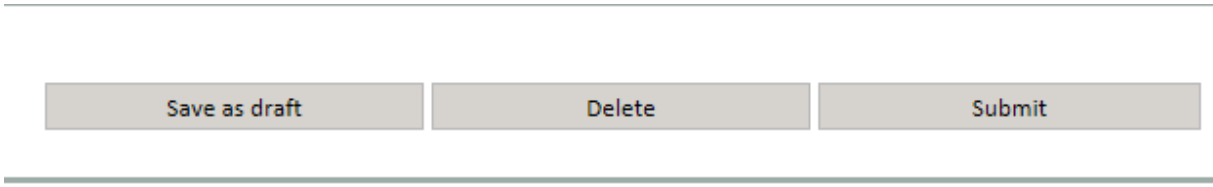


You will be able to see the list of attachments. Click on the red X to remove them, if required:



Submit

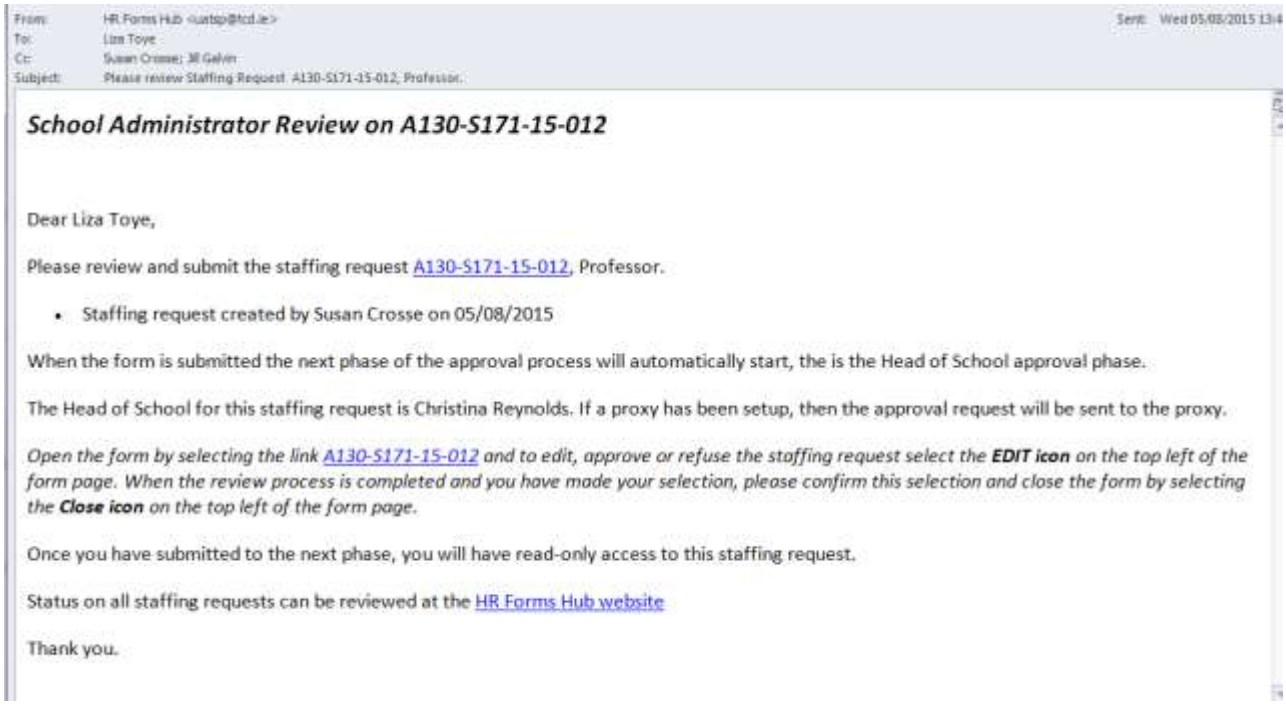
When you reach the end of the form, you have the choice to Save as Draft, Delete or Submit.



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:

When you choose Submit, an email will be sent to the next person in the process, in this example the School Administrator.

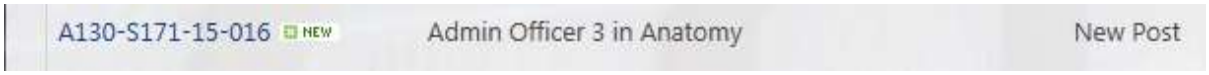


Your form has now moved to the next stage in the process. You can see this in the Staffing Request History view. There will be a small green "New" icon beside your form in the list:

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.

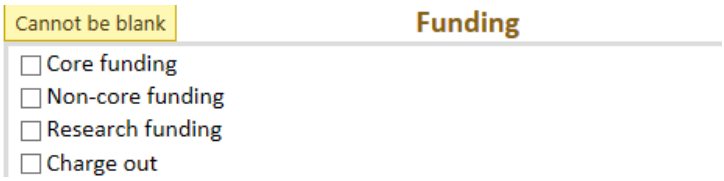
Error Messages when Submitting a Form

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

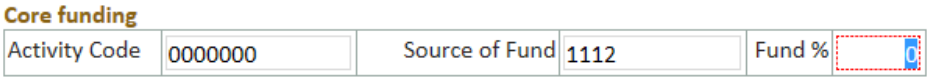
Mandatory fields

Cost Centre

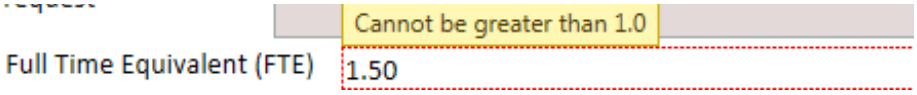
Funding



Fund %



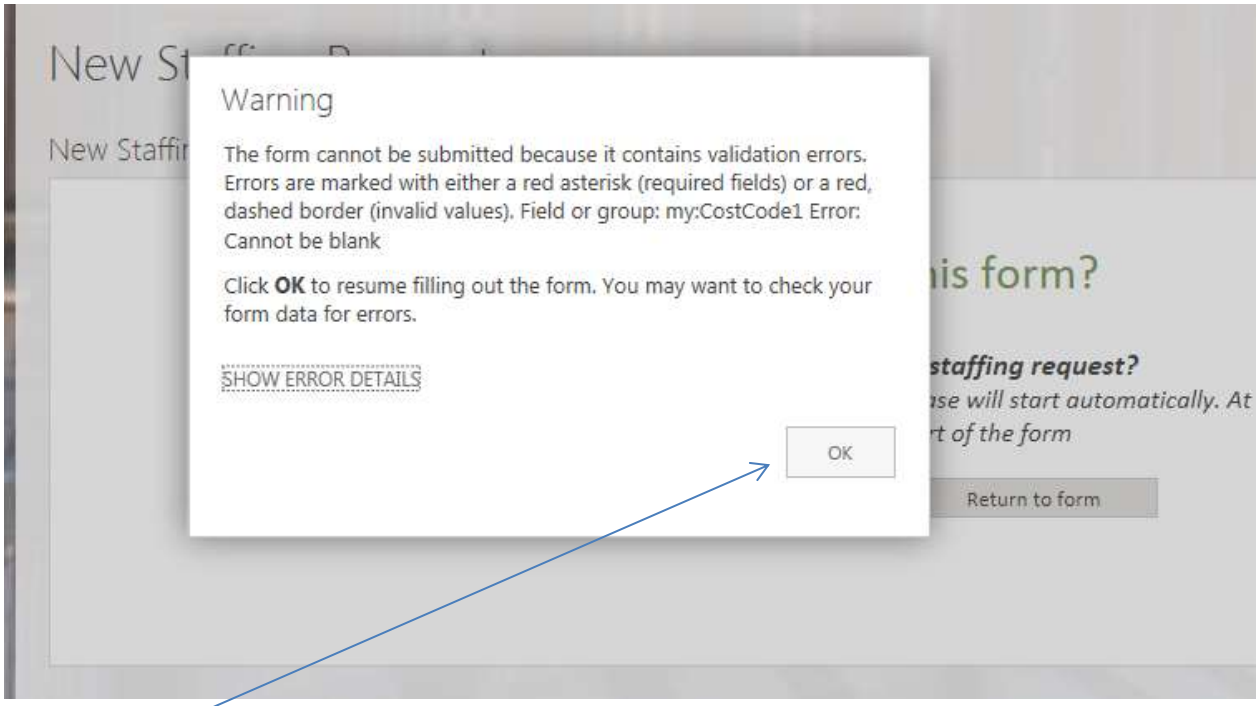
FTE



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.

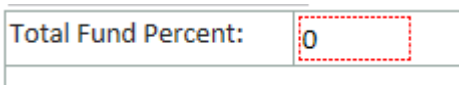
If you try to submit a form that has an error, you will see a SharePoint message:



Click OK

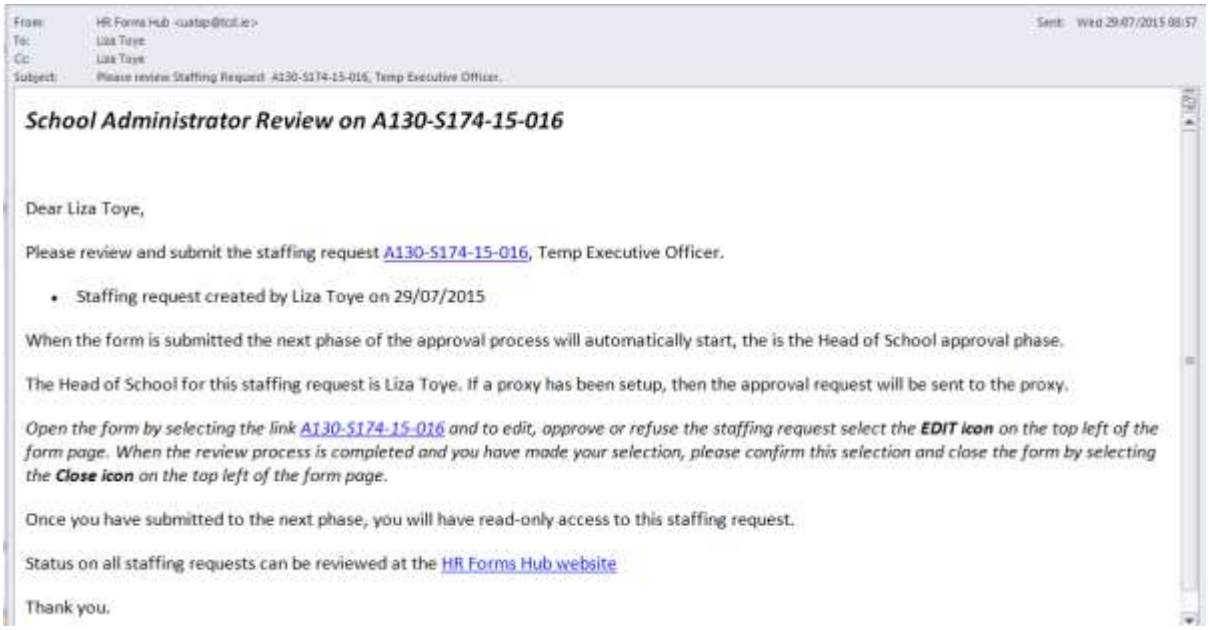
You will be brought back into the form, where you can fix the errors and Submit once again.

The field with the error should be marked with either a red asterisk or a red dashed border.



Stage 2a – School Administrator (Academic areas only)

When a Hiring Lead in an academic area has set up a new form and hits “Submit” an email is sent to the relevant School Administrator.



From: HR Forms Hub <uatsp@tcd.ie>
To: Liza Toye
Cc: Liza Toye
Subject: Please review Staffing Request A130-S174-15-016, Temp Executive Officer.
Sent: Wed 29/07/2015 08:57

School Administrator Review on A130-S174-15-016

Dear Liza Toye,

Please review and submit the staffing request A130-S174-15-016, Temp Executive Officer.

- Staffing request created by Liza Toye on 29/07/2015

When the form is submitted the next phase of the approval process will automatically start, the is the Head of School approval phase.

The Head of School for this staffing request is Liza Toye. If a proxy has been setup, then the approval request will be sent to the proxy.

*Open the form by selecting the link A130-S174-15-016 and to edit, approve or refuse the staffing request select the **EDIT icon** on the top left of the form page. When the review process is completed and you have made your selection, please confirm this selection and close the form by selecting the **Close icon** on the top left of the form page.*

Once you have submitted to the next phase, you will have read-only access to this staffing request.

Status on all staffing requests can be reviewed at the HR Forms Hub website

Thank you.

The School Administrator 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.

Staff Requisition

Staffing Request

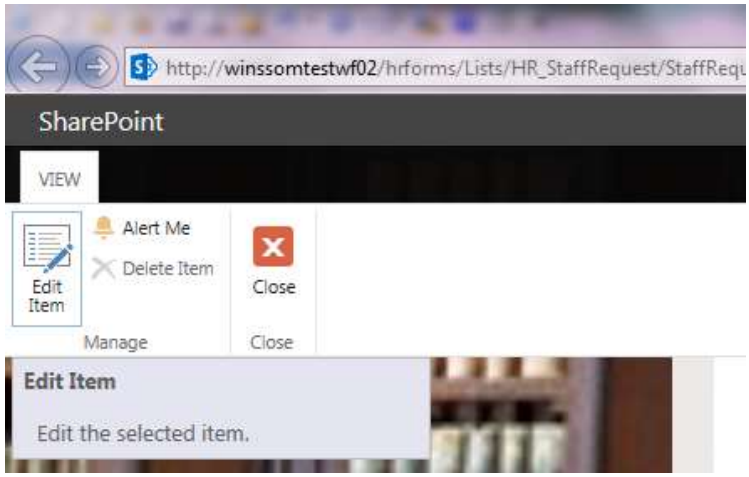
Summary Information

Reference No	A130-S174-15-001	Current Status	School Admin Review
Created by	Liza Toye	Create Date	15/06/2015
School / Area:	Faculty of Health Sciences		
Discipline	School of Medicine		
Cost Centre	1741 Nursing ☐ Add Cost Centre		
Job Title	Research Assistant		
Reporting To:	Michelle Clarke		

The School Administrator is sent this form for information purposes, before the form goes to the Head of School. They can make amendments to the form.

Edit Item

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

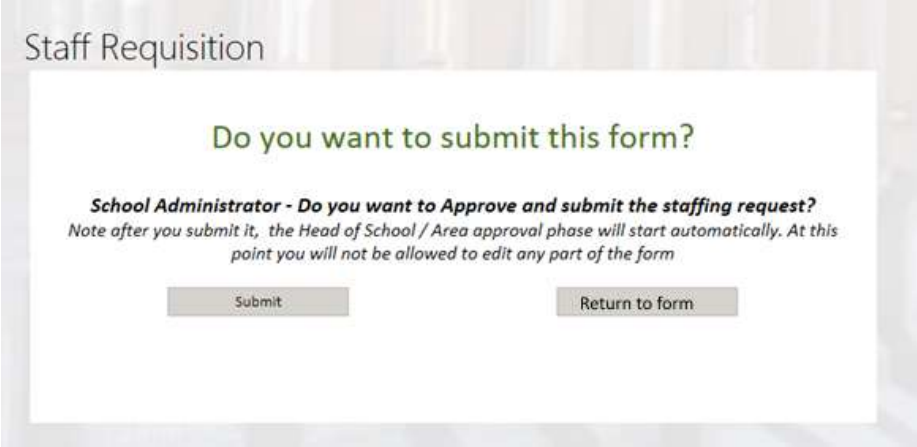


The School Administrator can make changes to the form, then choose either “Save As Draft” or “Submit”.

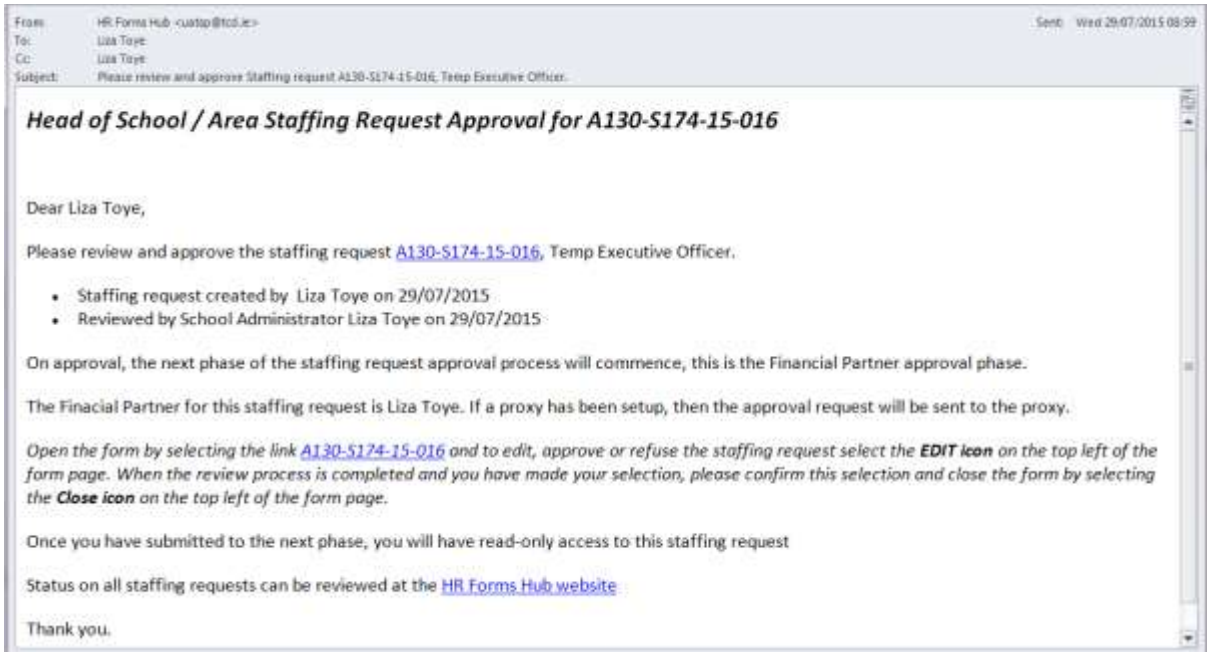
Note: if you wish to simply approve the form (not making any changes), you will still need to go into Edit mode for the Submit button at the bottom to appear.

Submit

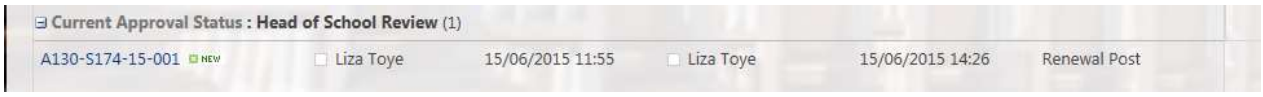
If you choose to Submit, you will be asked to confirm that you wish to submit the form to the next stage:



An email should now be sent to the Head of School.



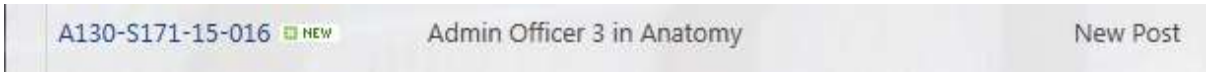
The form will also be listed in the Staffing Requests History under “Current Approval Status: Head of School Review”. There is a green “New” indicator on the form.



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: School Admin Draft”. Click on the file number link to reopen the form.



Error message when submitting a form

If you try to submit a form that has an error, you will see a SharePoint message “the form cannot be submitted because it contains validation errors …”

Click OK.

You will be brought back into the form, where you can fix the errors and Submit once again.

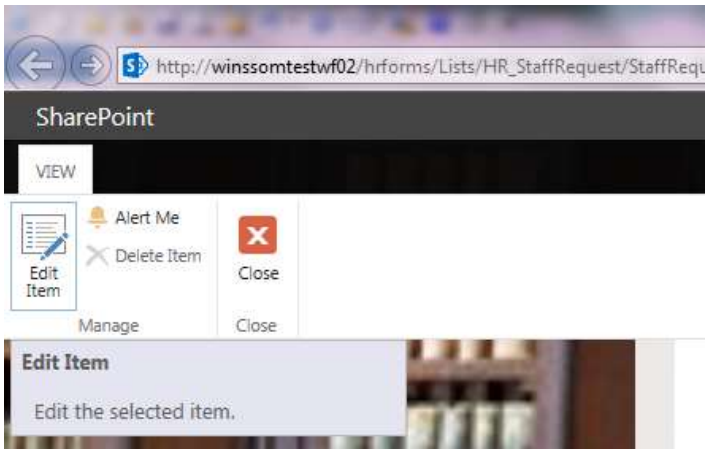
Stage 2b – Head of Area / Head of School

When a Hiring Lead in a non-academic area or a School Administrator in an academic area has prepared a form and hit “Submit”, an email is sent to the relevant Head of Area or Head of School.

The Head of Area/School 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.

The Head of Area/School can make amendments to the form.

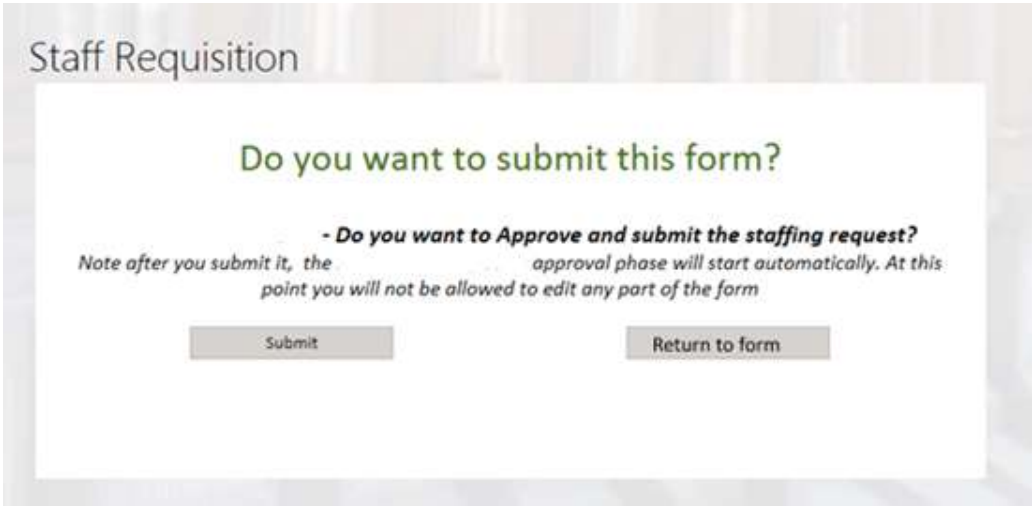
In order to do any work on this form, the user must be in Edit mode. Click on “Edit Item” in the left hand corner:



The Head of School/Area can make changes to the form, then choose either “Approve”, “Save Draft”, “On Hold” or “Reject”.

Approve

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



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	

An email should now be sent to the Finance Partner.

Finance Partner Staffing Request Approval on A130-S174-15-016

Dear Liza Toye,

Please review and approve the staffing request A130-S174-15-016, Temp Executive Officer.

- Staffing request has been created by Liza Toye on 29/07/2015
- Approved by Head of School / Area Liza Toye on 29/07/2015

On approval the next phase of the approval process will automatically start, this is the HR Partner review phase.

The HR Partner for this staffing request is Liza Toye. If a proxy has been setup, then the approval request will be sent to the proxy.

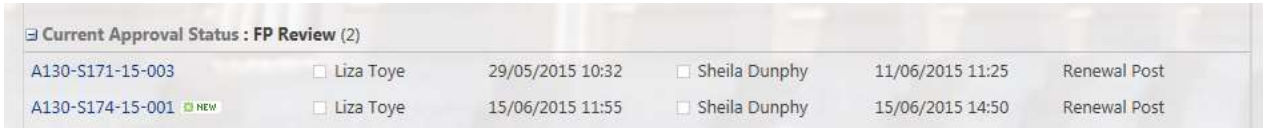
*Open the form by selecting the link A130-S174-15-016 and to edit, approve or refuse the staffing request select the **EDIT icon** on the top left of the form page. When the review process is completed and you have made your selection, please confirm this selection and close the form by selecting the **Close icon** on the top left of the form page.*

Once you have submitted to the next phase, you will have read-only access to this staffing request.

Status on all staffing requests can be reviewed at the HR Forms Hub website

Thank you.

The form will also be listed in the Staffing Requests History under "Current Approval Status: FP Review". There is a green "New" indicator just beside the file number link.



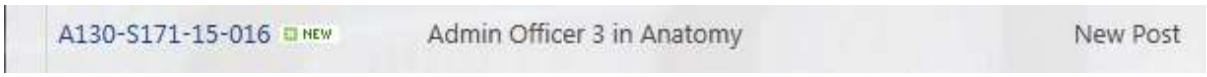
Current Approval Status : FP Review (2)

A130-S171-15-003	Liza Toye	29/05/2015 10:32	Sheila Dunphy	11/06/2015 11:25	Renewal Post
A130-S174-15-001 NEW	Liza Toye	15/06/2015 11:55	Sheila Dunphy	15/06/2015 14:50	Renewal Post

Save as Draft

If you **Save Draft**, the form will close and you can return to it at any time to complete your information.

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



On Hold

If you choose to put a form On Hold, the form will be closed.

The saved form will be listed in the Staffing Requests History under “On Hold”.

If you put it On Hold, it will stay in your HR Forms Hub without changing for 1 year, at which time it will automatically delete.

Reject

If the Head of School rejects the request, the process will complete, the Hiring Lead will be informed that the request has been rejected. If they wish to start the process again, they will need to start a new form. The form will be closed.

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

Error message when submitting a form

If you try to submit a form that has an error, you will see a SharePoint message “the form cannot be submitted because it contains validation errors …”

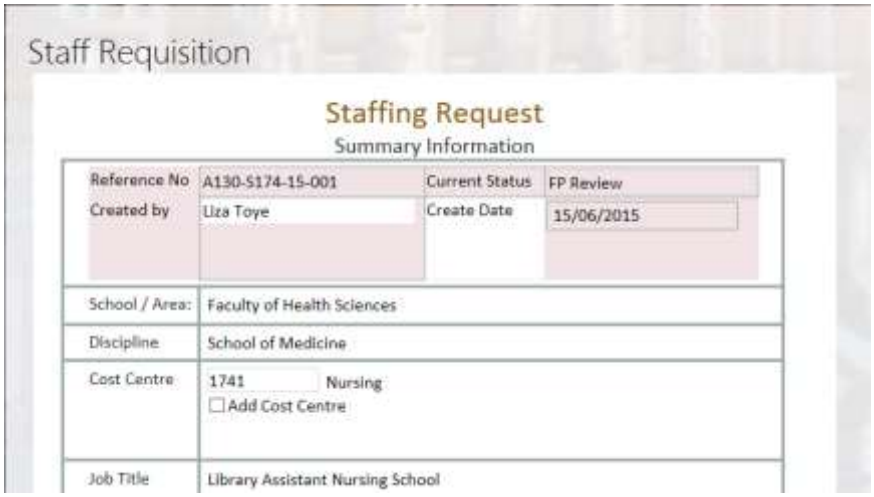
Click OK.

You will be brought back into the form, where you can fix the errors and Submit once again.

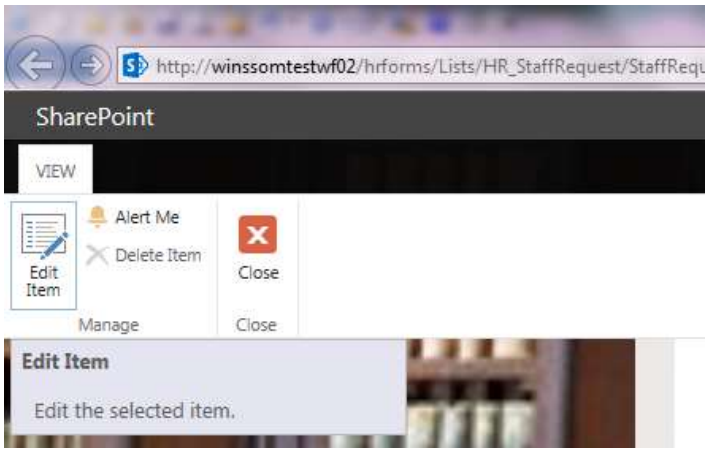
Stage 3 – Finance Partner

When the Head of Area or Head of School has approved and submitted a form, an email is sent to the relevant Finance Partner.

The Finance Partner 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.



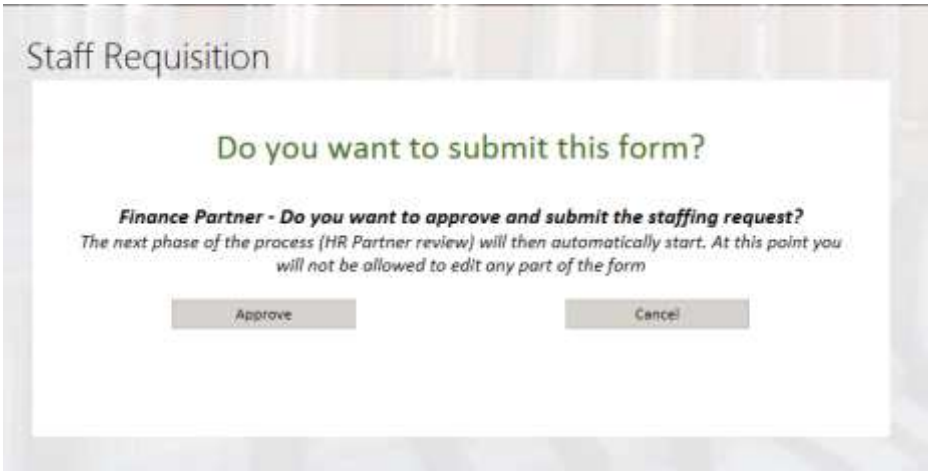
In order to do any work on this form, the user must be in Edit mode. Click on "Edit Item" in the left hand corner:



The Finance Partner can make amendments to the form, then choose either "Approve" or "Reject".

Approve

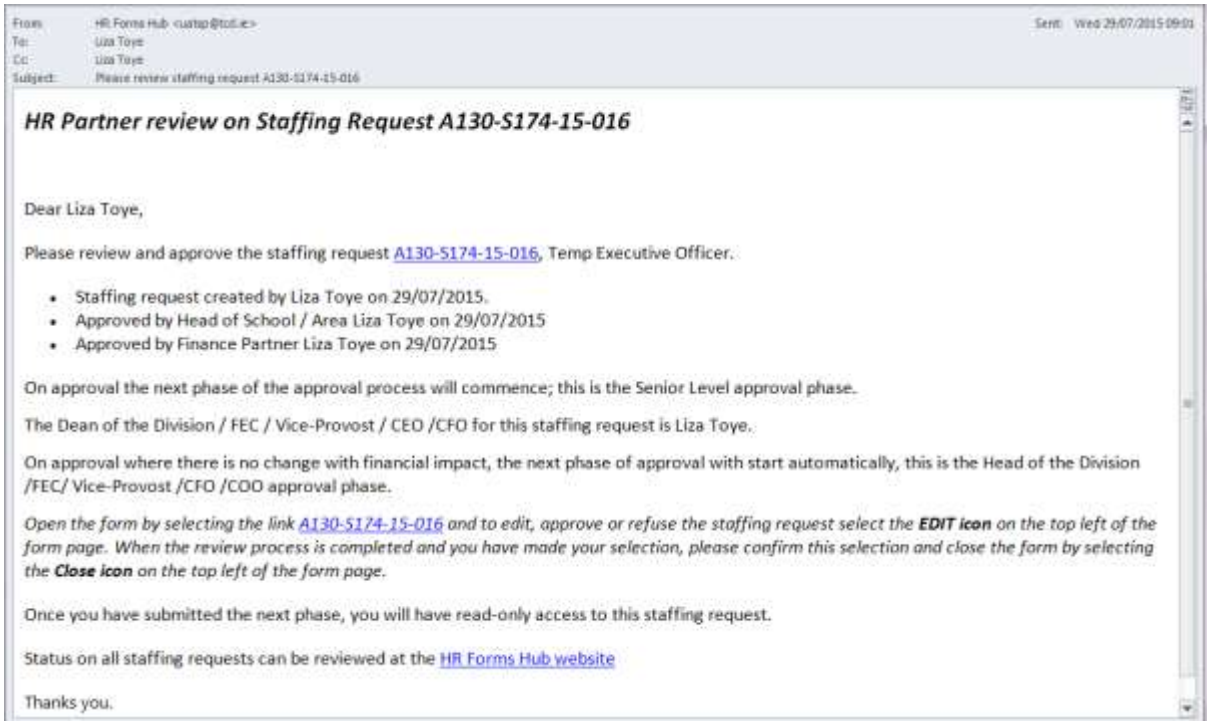
If the Finance Partner approves the form, they will be asked to confirm that they wish to submit the form to the next stage:



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	Approved	15/06/2015
HR Partner	Liza Toye	Not Started	
Dean/FEC	Liza Toye	Not Started	

An email should now be sent to the HR Partner.



HR Partner review on Staffing Request A130-S174-15-016

Dear Liza Toye,

Please review and approve the staffing request A130-S174-15-016, Temp Executive Officer.

- Staffing request created by Liza Toye on 29/07/2015.
- Approved by Head of School / Area Liza Toye on 29/07/2015
- Approved by Finance Partner Liza Toye on 29/07/2015

On approval the next phase of the approval process will commence; this is the Senior Level approval phase.

The Dean of the Division / FEC / Vice-Provost / CEO /CFO for this staffing request is Liza Toye.

On approval where there is no change with financial impact, the next phase of approval with start automatically, this is the Head of the Division /FEC/ Vice-Provost /CFO /COO approval phase.

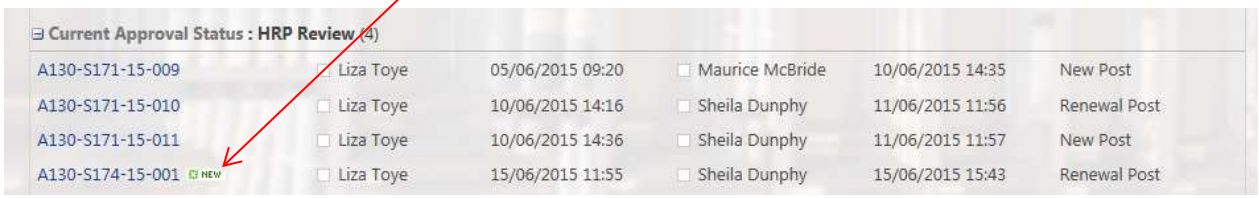
*Open the form by selecting the link A130-S174-15-016 and to edit, approve or refuse the staffing request select the **EDIT icon** on the top left of the form page. When the review process is completed and you have made your selection, please confirm this selection and close the form by selecting the **Close icon** on the top left of the form page.*

Once you have submitted the next phase, you will have read-only access to this staffing request.

Status on all staffing requests can be reviewed at the HR Forms Hub website

Thanks you.

The form will also be listed in the Staffing Requests History under "Current Approval Status: HR Review". There is a green "New" indicator on the form.



Current Approval Status : HRP Review (4)					
A130-S171-15-009	Liza Toye	05/06/2015 09:20	Maurice McBride	10/06/2015 14:35	New Post
A130-S171-15-010	Liza Toye	10/06/2015 14:16	Sheila Dunphy	11/06/2015 11:56	Renewal Post
A130-S171-15-011	Liza Toye	10/06/2015 14:36	Sheila Dunphy	11/06/2015 11:57	New Post
A130-S174-15-001 NEW	Liza Toye	15/06/2015 11:55	Sheila Dunphy	15/06/2015 15:43	Renewal Post

Reject

If the Finance Partner rejects the request, the process will complete; the Hiring Lead will be informed that the request has been rejected. If they wish to start the process again, they will need to start a new form.

The form will be closed.

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

Error message when submitting a form

If you try to submit a form that has an error, you will see a SharePoint message “the form cannot be submitted because it contains validation errors …”

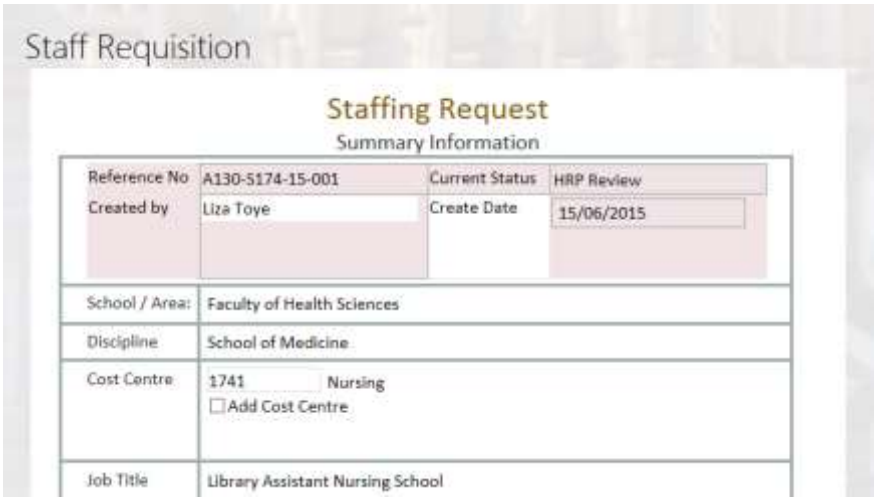
Click OK.

You will be brought back into the form, where you can fix the errors and Submit once again.

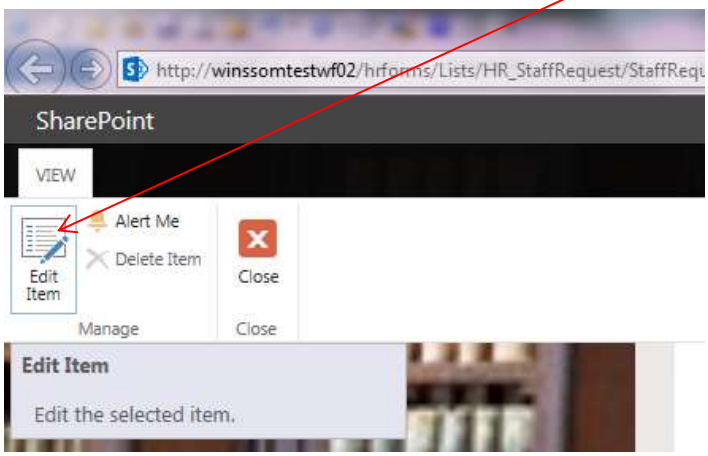
Stage 4 – HR Partner

When the Finance Partner has approved and submitted a form, an email is sent to the relevant HR Partner.

The HR Partner 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.



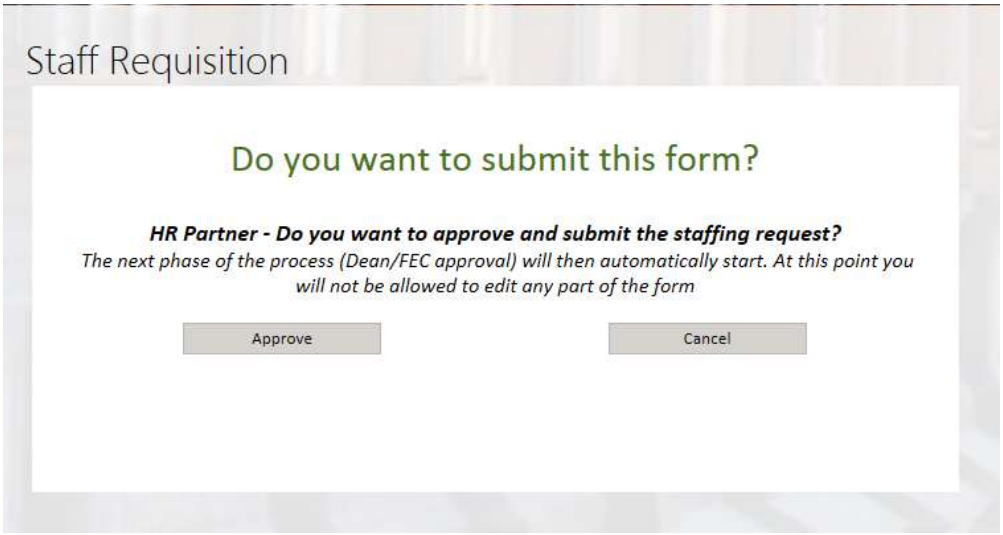
In order to do any work on this form, the user must be in Edit mode. Click on "Edit Item" in the left hand corner:



The HR Partner can make amendments to the form, then choose either "Approve" or "Reject".

Approve

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



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	Approved	15/06/2015
HR Partner	Liza Toye	Approved	15/06/2015
Dean/FEC	Liza Toye	Not Started	

An email should now be sent to the Senior Lead (the Dean, Vice-Provost / CEO / CFO etc.)

Senior Level (Dean / FEC/ Vice-Provost / CEO /CFO) review of staffing request A130-S174-15-013

Dear Liza Toye,

Please review and approve the staffing request A130-S174-15-013, Clinical Tutor, submitted by Liza Toye on 28/07/2015. This request has been approved by:

- Staffing request created by Liza Toye on 28/07/2015
- Approved by Head of School / Area Liza Toye on 28/07/2015;
- Approved by Finance Partner Liza Toye on 28/07/2015;
- Approved by HR Partner Liza Toye on 28/07/2015

*Open the form by selecting the link A130-S174-15-013 and to edit, approve or refuse the staffing request select the **EDIT icon** on the top left of the form page. When the review process is completed and you have made your selection, please confirm this selection and close the form by selecting the **Close icon** on the top left of the form page.*

On completion of the approval process, you will have read-only access to this staffing request.

Status on all staffing requests can be reviewed at the HR Forms Hub website

Thank you.

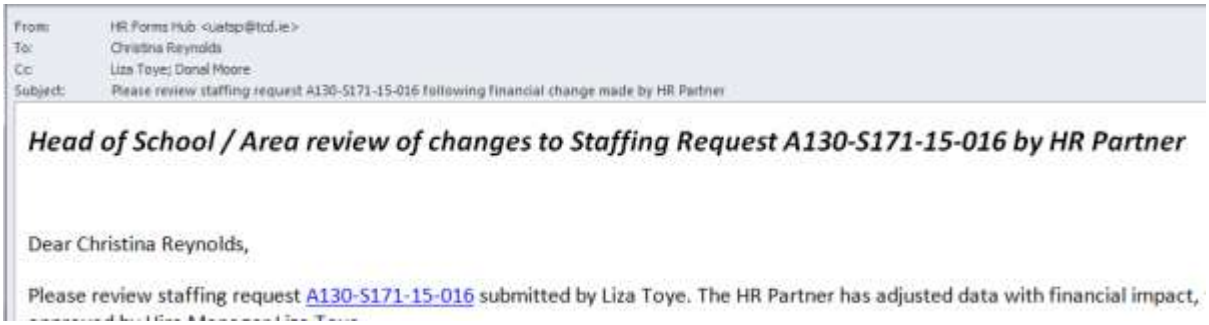
The form will also be listed in the Staffing Requests History under "Current Approval Status: Senior Level Review". There is a green "New" indicator on the form.

Current Approval Status : **Senior Level Review** (2)

A130-S171-15-007	Liza Toye	29/05/2015 14:16	Sheila Dunphy	08/06/2015 10:33	New Post
A130-S174-15-001 new	Liza Toye	15/06/2015 11:55	Sheila Dunphy	15/06/2015 16:27	Renewal Post

HR Partner changes

If the HR Partner makes changes that have a financial implication (a change of payscale or change of funding percentage, for example), the form will be sent back to the Head of School and Finance Partner for review and approval of the changes. The HR Partner edits the form, and hits Approve as usual. In this case, an email will be sent to the Head of School:



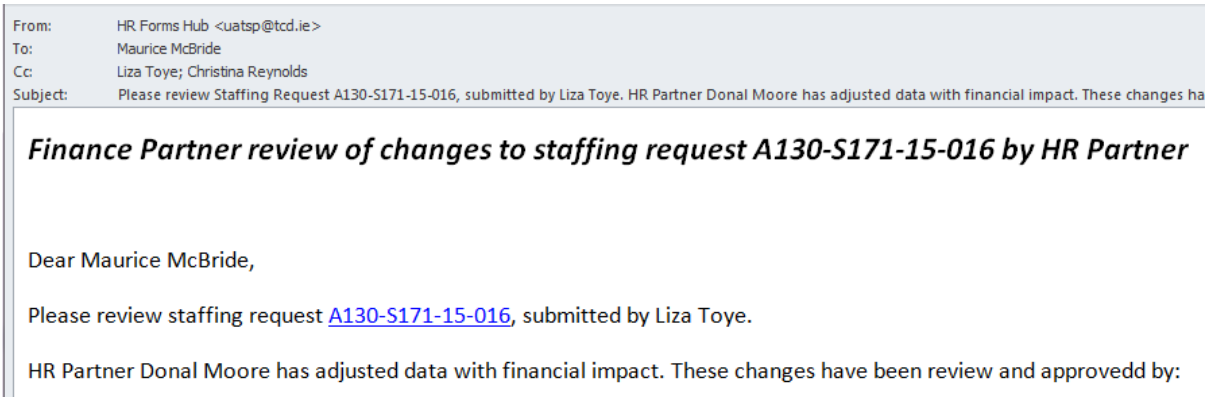
From: HR Forms Hub <uatsp@tcd.ie>
To: Christina Reynolds
Cc: Liza Toye; Donal Moore
Subject: Please review staffing request A130-S171-15-016 following financial change made by HR Partner

Head of School / Area review of changes to Staffing Request A130-S171-15-016 by HR Partner

Dear Christina Reynolds,

Please review staffing request A130-S171-15-016 submitted by Liza Toye. The HR Partner has adjusted data with financial impact,

The Head of School can then review and approve these changes. An email will then be sent to the Finance Partner:


From: HR Forms Hub <uatsp@tcd.ie>
To: Maurice McBride
Cc: Liza Toye; Christina Reynolds
Subject: Please review Staffing Request A130-S171-15-016, submitted by Liza Toye. HR Partner Donal Moore has adjusted data with financial impact. These changes ha

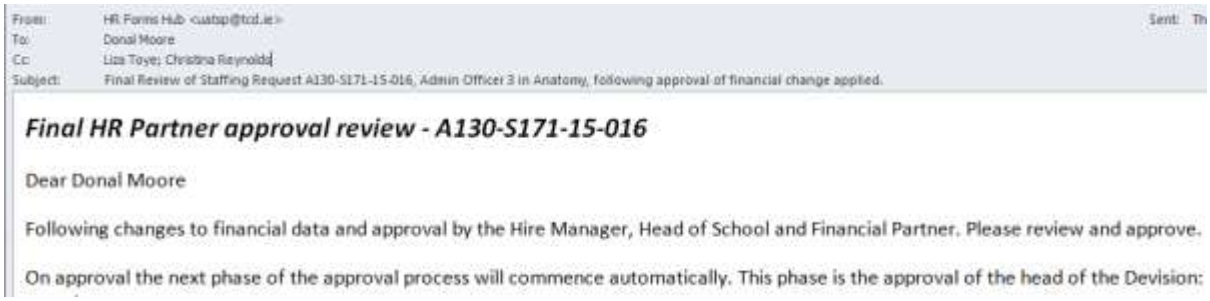
Finance Partner review of changes to staffing request A130-S171-15-016 by HR Partner

Dear Maurice McBride,

Please review staffing request A130-S171-15-016, submitted by Liza Toye.

HR Partner Donal Moore has adjusted data with financial impact. These changes have been review and approvedd by:

The Finance Partner can then review and approve these changes. An email is then sent to the HR Partner:


From: HR Forms Hub <uatsp@tcd.ie>
To: Donal Moore
Cc: Liza Toye; Christina Reynolds
Subject: Final Review of Staffing Request A130-S171-15-016, Admin Officer 3 in Anatomy, following approval of financial change applied.

Final HR Partner approval review - A130-S171-15-016

Dear Donal Moore

Following changes to financial data and approval by the Hire Manager, Head of School and Financial Partner. Please review and approve.

On approval the next phase of the approval process will commence automatically. This phase is the approval of the head of the Devision:

The HR Partner is now in the position to Approve the form, where it will carry on to the next stage, Senior Level approval.

Reject

If the HR Partner rejects the request, the process will complete; the Hiring Lead will be informed that the request has been rejected. If they wish to start the process again, they will need to start a new form.

The form will be closed.

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

Error message when submitting a form

If you try to submit a form that has an error, you will see a SharePoint message “the form cannot be submitted because it contains validation errors …”

Click OK.

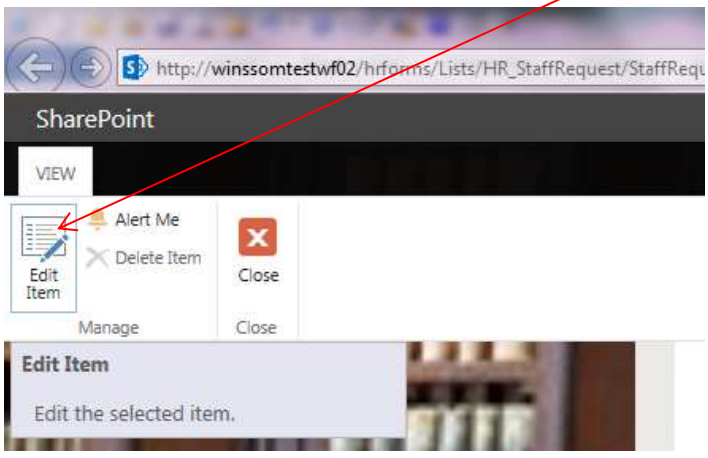
You will be brought back into the form, where you can fix the errors and Submit once again.

Stage 5 – Senior Level Manager

When the HR Partner has approved and submitted a form, an email is sent to the relevant Senior Level manager (Dean / Head of Division / Vice-Provost / COO / CFO etc.).

The Senior Level manager 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.

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



The Senior Level manager cannot make amendments to the form; they can select "Approve", "On Hold" or "Reject".

Approve

If the Senior Level manager approves the form, they will be asked to confirm that they wish approve the staffing request.

When the form has been approved, the Approval Status list at the end of the form will also update.

	Approvers/Reviewers	Approval Status	Date
Head of Area	Liza Toye	Approved	21/07/2015
Finance Partner	Liza Toye	Approved	21/07/2015
HR Partner	Liza Toye	Approved	21/07/2015
Dean/FEC	Liza Toye	Approved	21/07/2015

An email will now be sent to the Hiring Lead, confirming that the form has been approved:

From: HR Forms Hub <uatsp@tcd.ie>
To: Liza Toye
Cc: Liza Toye
Subject: Staffing request A130-S174-15-008 has final approoval.

Staffing Request A130-S174-15-008 - Final Approval

Dear Liza Toye,

The Staffing request A130-S174-15-008 has been approved by Liza Toye or their proxy on 21/07/2015.

At this stage the staffing request record is read only.

Thanks you.

The information from this approved form can now be pulled into the FEC spreadsheet by the HR Partner.

On Hold

If the form is put On Hold, it will stay in the HR Forms Hub without changing for 1 year, at which time it will automatically delete.

Reject

If the Senior Level manager rejects the request, the process will complete; the Hiring Lead will be informed that the request has been rejected. If they wish to start the process again, they will need to start a new form.

The form will be closed.

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

Error message when submitting a form

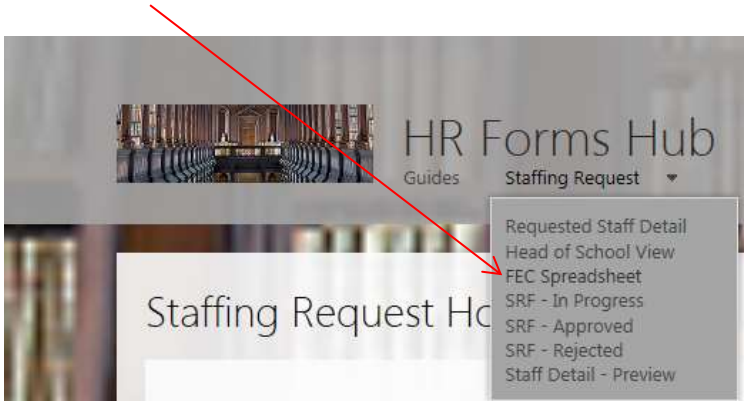
If you try to submit a form that has an error, you will see a SharePoint message “the form cannot be submitted because it contains validation errors …”

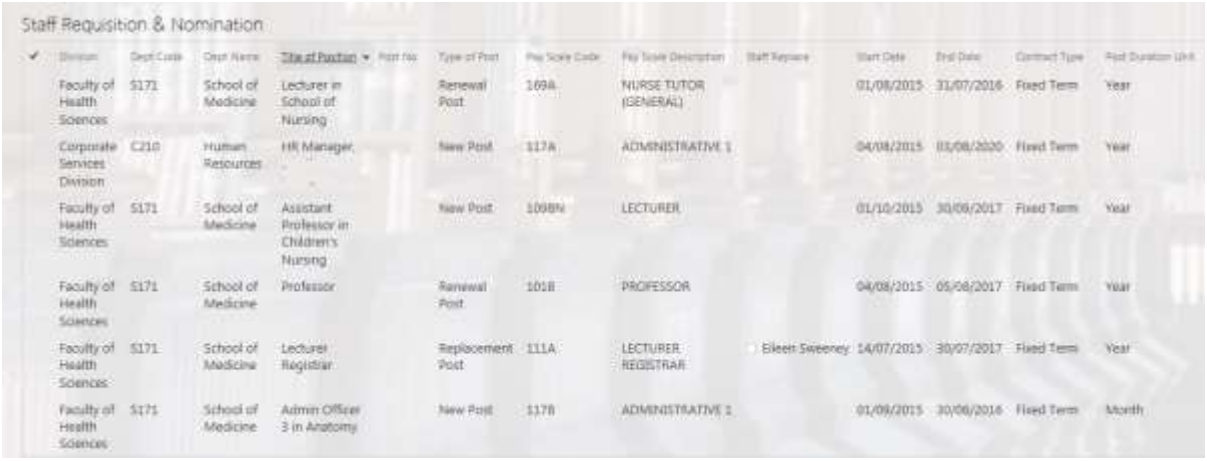
Click OK.

You will be brought back into the form, where you can fix the errors and Submit once again.

FEC Spreadsheet

When the form has gone through to Final Approval by the Dean, it will now appear on the FEC spreadsheet view.





This view can be exported to Excel, for use by Human Resources to process each Staffing Request.

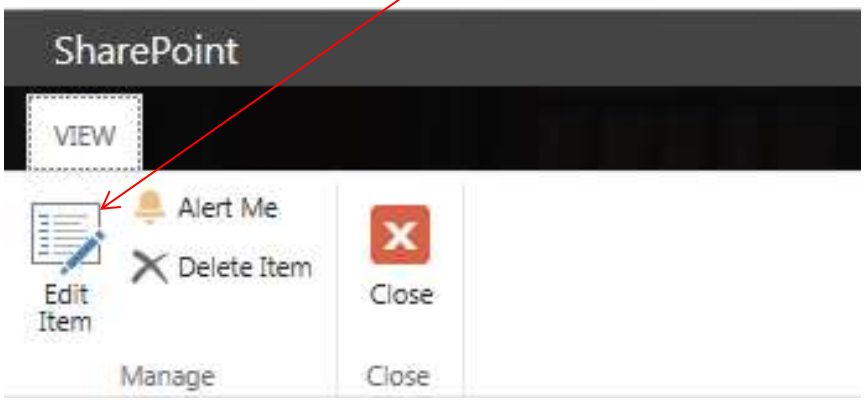
Editing

When you have started a form and saved it as draft, you can come back to work on it at any time. Click on "Staffing Request Home" in the navigation, to go to the Staffing Requests History list.

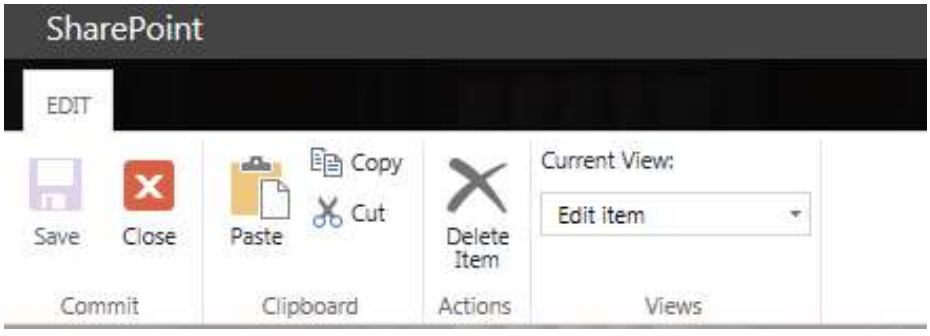
In this example, there are two forms that are currently saved as draft. One of these is new – it has a small green "new" notification beside it.

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.



When you complete your changes, you can again Save as Draft, if required.

Permissions

Who can do what?

Hiring Lead:	Submit	Save as Draft		Delete
School Administrator:	Submit	Save as Draft		
Head of Area	Approve	Save as Draft	On Hold	Reject
Finance Partner	Approve			Reject
HR Partner	Approve			Reject
Senior Level	Approve		On Hold	Reject

Appendix 1: Source of Funds Codes

Where staff are funded using a General Ledger (GL) code, the following 3 codes are the only available options to select from.

Code	Description	Detail	ECF Category
1112	Core Funding	This includes all *Cista Communis* staff. Staff coded to this code are included in the ECF staffing allocation headcount (aka HEA headcount). Staff previously coded as 3102 (HEA targeted initiatives) have always been included in the HEA headcount, but will now have their codes changed to 1112 for consistency.	**1.1**
1212	Exchequer Funding (Non Core)	Exchequer funded, but not Core Funded. This includes staff funded from Research Overheads where the Research has been funded from Exchequer Sources. Examples include: SFI overheads, Enterprise Ireland overheads, funding from any Government department.	**1.2**
3100	Non-Exchequer Funding	This includes any funding that has not come from the Irish Exchequer. Examples include: • Commercial revenue, • Benefactions, • International student income • Research overheads where the Research is funded from the EU or private sources And various other sources	**1.3**

Funding Administrative Systems

System	Detail
GL – General Ledger	Uses the Project Code for the administration of staff costs. This comprises a 7 digit Activity Code + 4 digit Source of Fund. Most staff are on GL codes.
Poeta – Research Staff	Research staff working on Research Projects funded by a Research award are coded using the Poeta system. This is a 13 digit code commencing with the digit '2'. Source of funds codes do not apply in these instances as the Research award forms part of the code.
AR – Accounts Receivable	These are also known as Charge-outs. The employees' salary is paid by Trinity, and then the cost (or part of it) is invoiced to a third party organisation for re-imbursement. These are 12 digit codes commencing with the digit '5'. Source of funds codes do not apply in these instances as the Accounts Receivable code must be used.