Date: 18 March 2016

Quick Guide to Online Staff Request Forms

Table of Contents

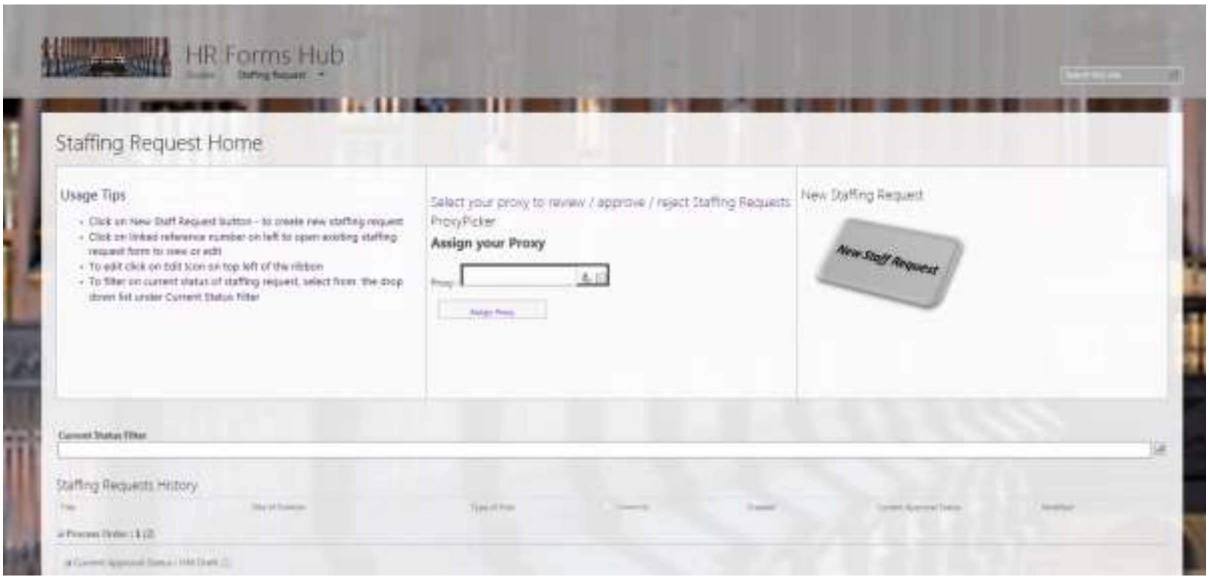
Logging In

The HR Forms Hub is found at https://archtest.tcd.ie/hrforms/Pages/default.aspx. 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:



Proxies

Setting a Proxy

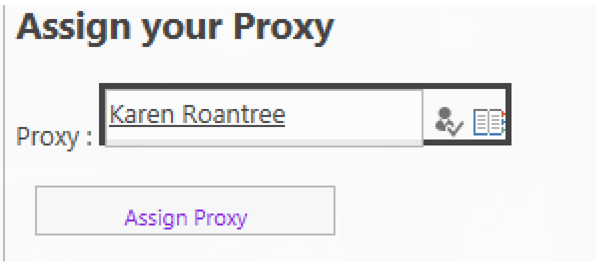
From time to time, a user may wish to nominate someone else to act as their proxy to review / approve / reject Staff Request Forms.

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.



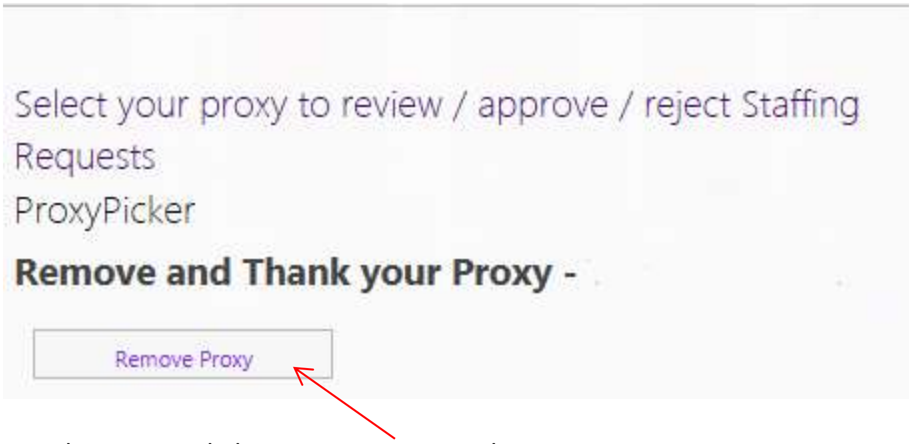
Click on the Assign Proxy button to complete the process

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

Hiring Lead Stage

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

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

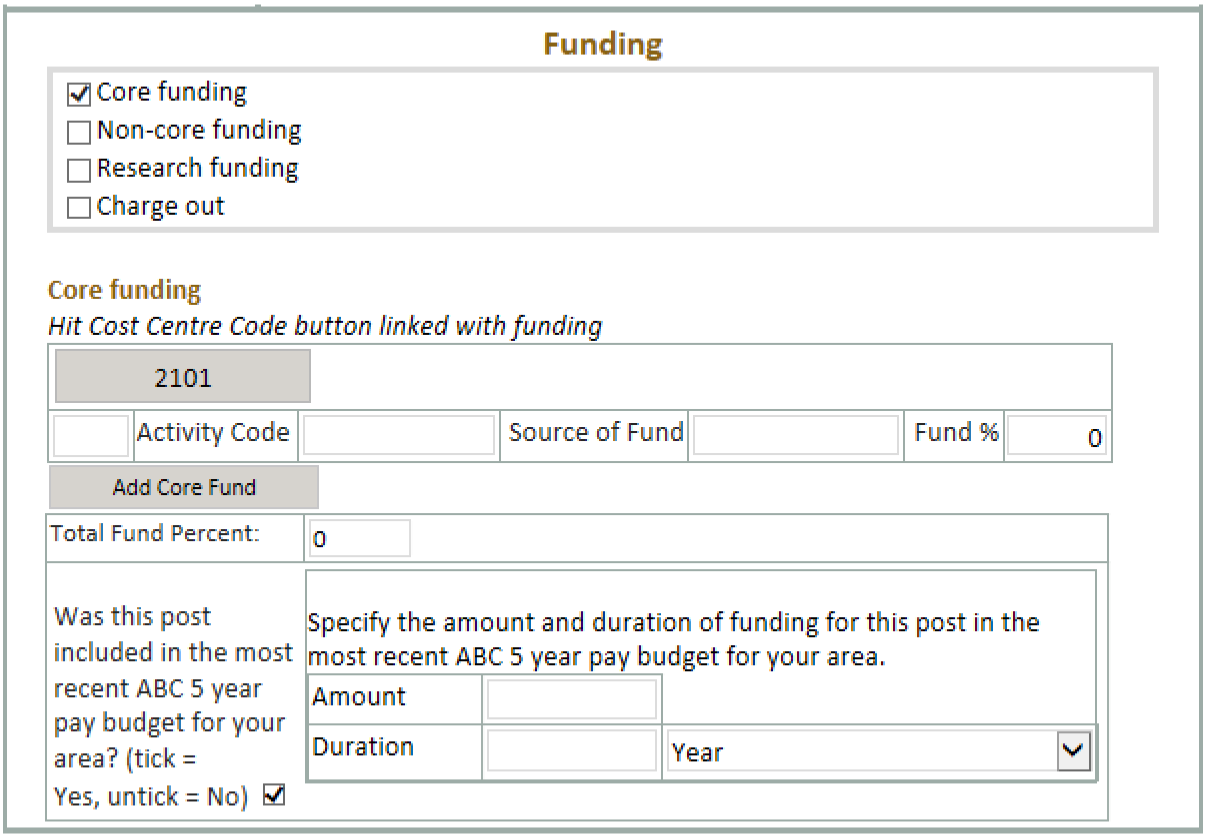
There are three parts to the Funding section: Type of funding, Funding Percentage and ABC Pay Budget. If you have queries about the funding for your particular staff request, your Faculty/Division Finance Partner should be able to assist you with the details required for this section.

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

- [x] Core funding
- [ ] Non-core funding
- [ ] Research funding
- [ ] Charge out

Core funding

Hit Cost Centre Code button linked with funding

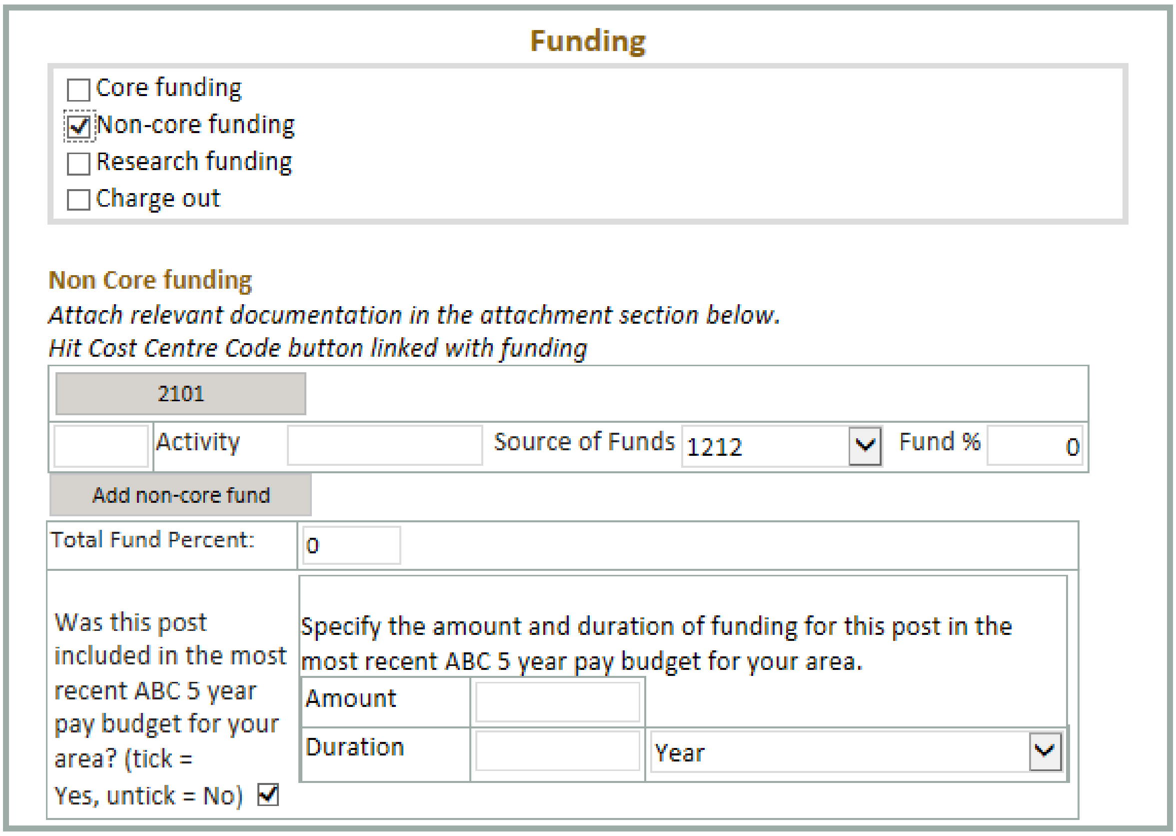
2101						
	Activity Code		Source of Fund		Fund %	0
Add Core Fund						

Total Fund Percent:	0
Was this post included in the most recent ABC 5 year pay budget for your area? (tick = Yes, untick = No) ☑	Specify the amount and duration of funding for this post in the most recent ABC 5 year pay budget for your area.

Amount		
Duration		Year

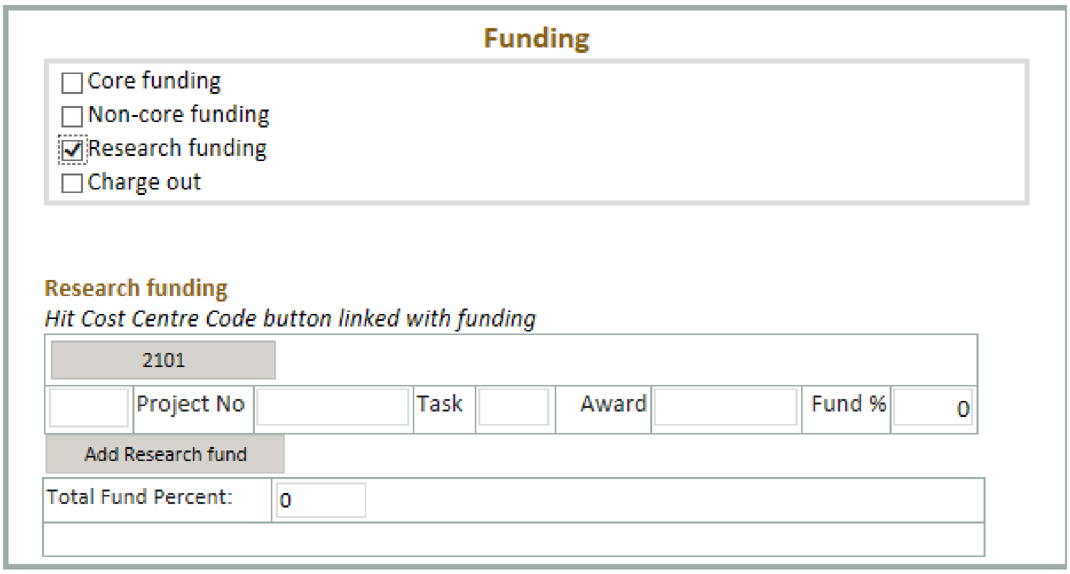
Non-Core Funding

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:



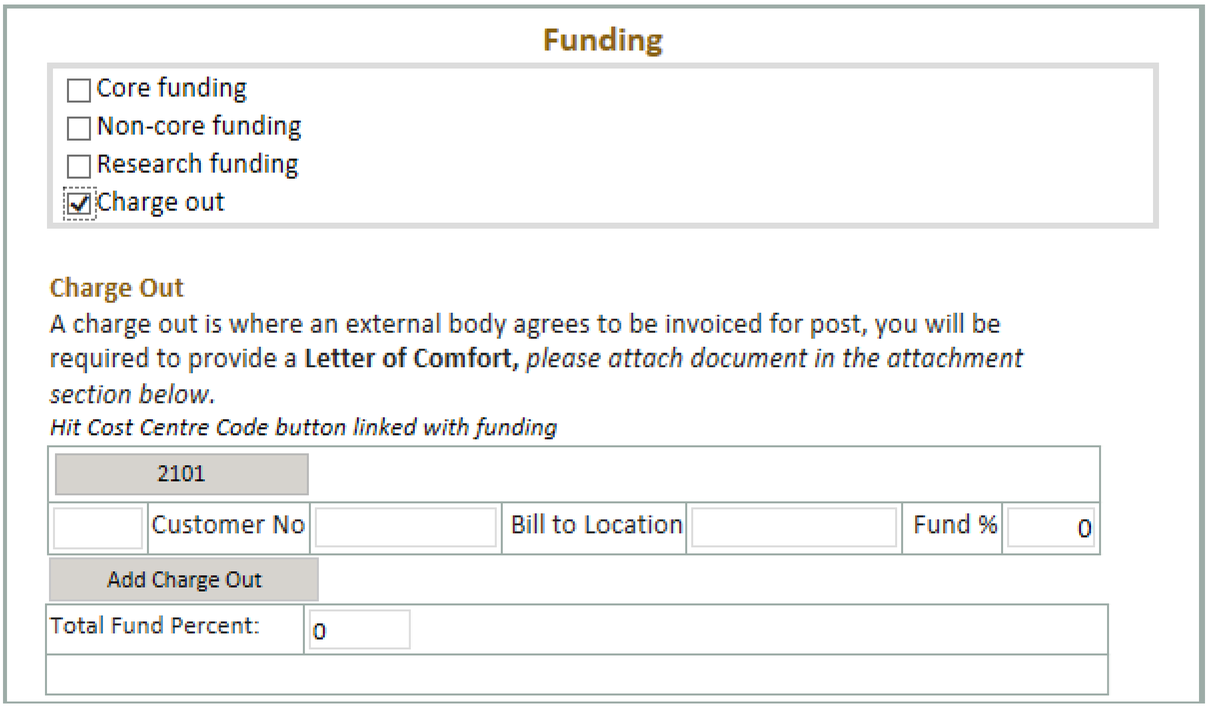
Research Funding

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



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
- [x] Charge out

Charge Out

A charge out is where an external body agrees to be invoiced for post, you will be required to provide a **Letter of Comfort,** *please attach document in the attachment section below.*

Hit Cost Centre Code button linked with funding

2101							
	Customer No		Bill to Location		Fund %	0	

Add Charge Out

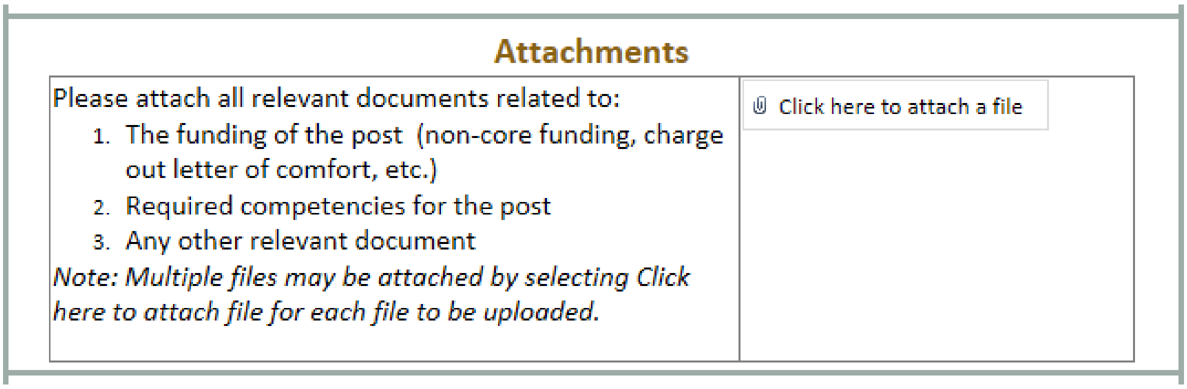
Total Fund Percent:	0

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.

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

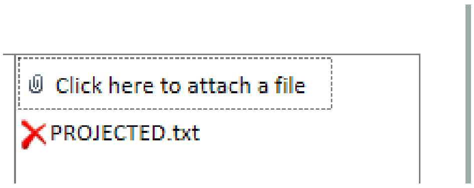
Please attach all relevant documents related to:

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

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



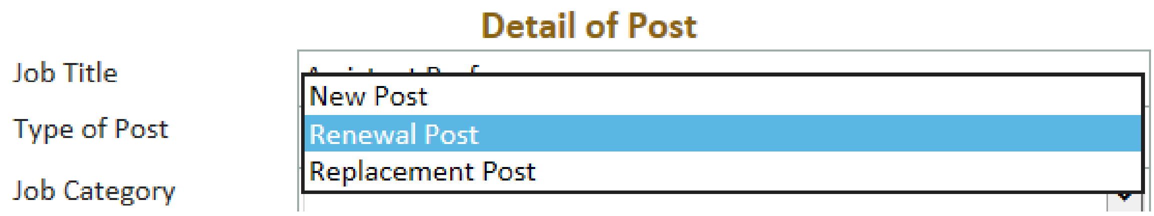
Click here to attach a file

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

Type of Post

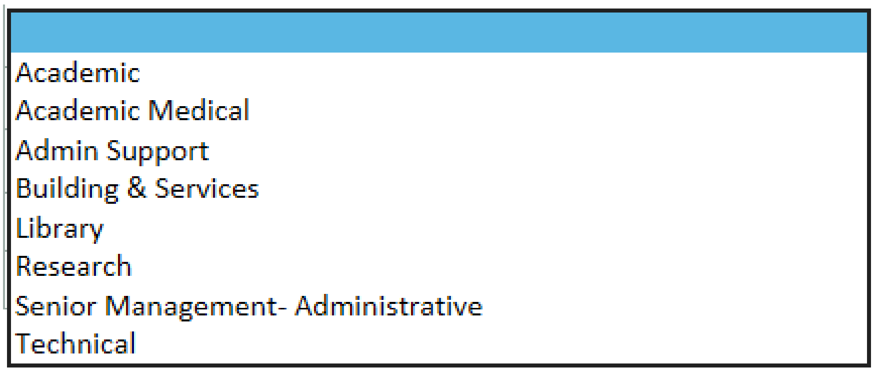
Job Category

New Post

Renewal Post

Replacement Post

Job Category: Select the appropriate job category



Academic

Academic Medical

Admin Support

Building & Services

Library

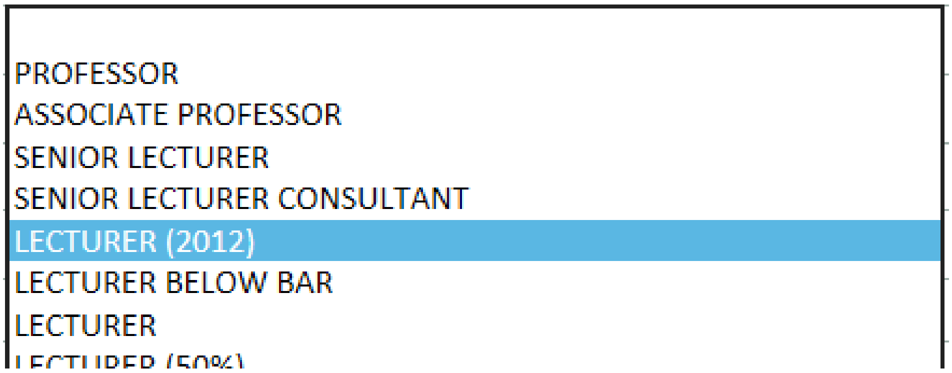
Research

Senior Management- Administrative

Technical

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

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



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

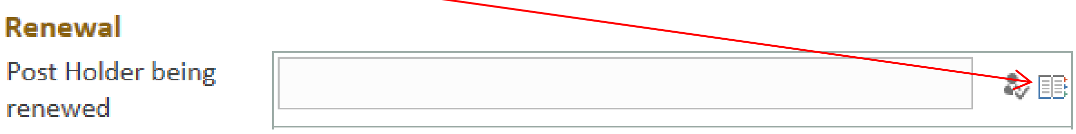
Choose the Pay Scale Code (there is usually only one):

The pay scale range will automatically populate.

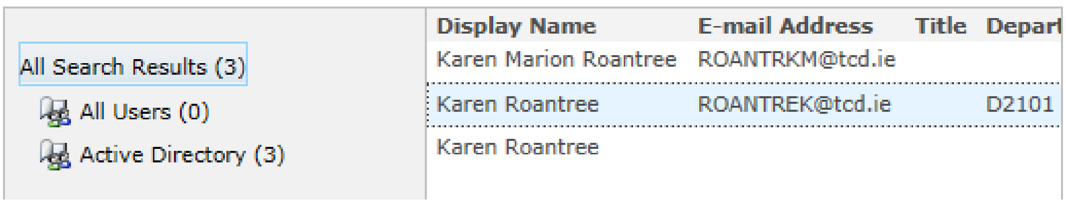
Replacement Type: Choose from the dropdown list.

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
Resignation
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.



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.

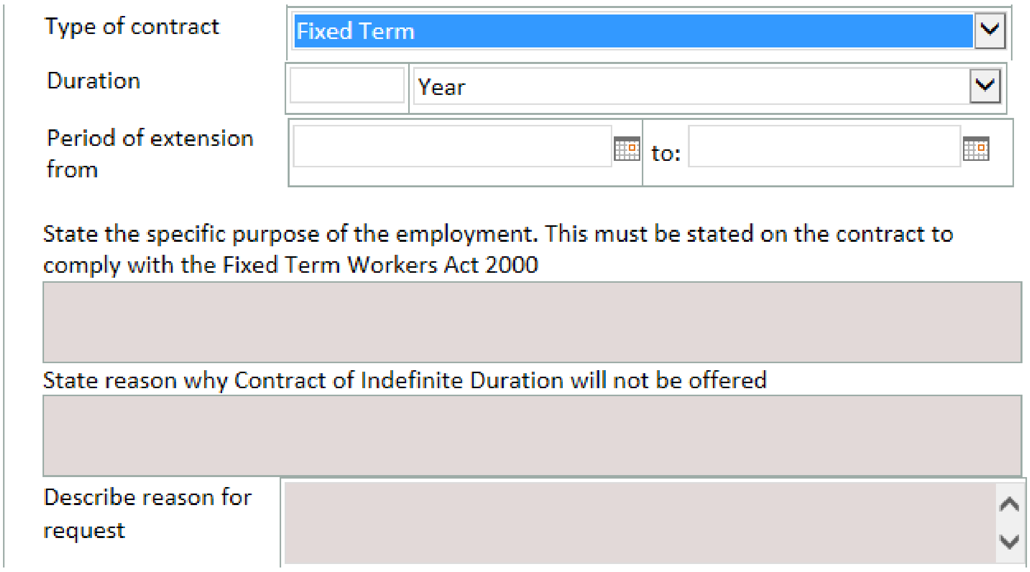


Select the person you require, click OK. The name will now appear in the Post Holder being renewed / Previous Post Holder field.

Type of contract: Select the appropriate contract type

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

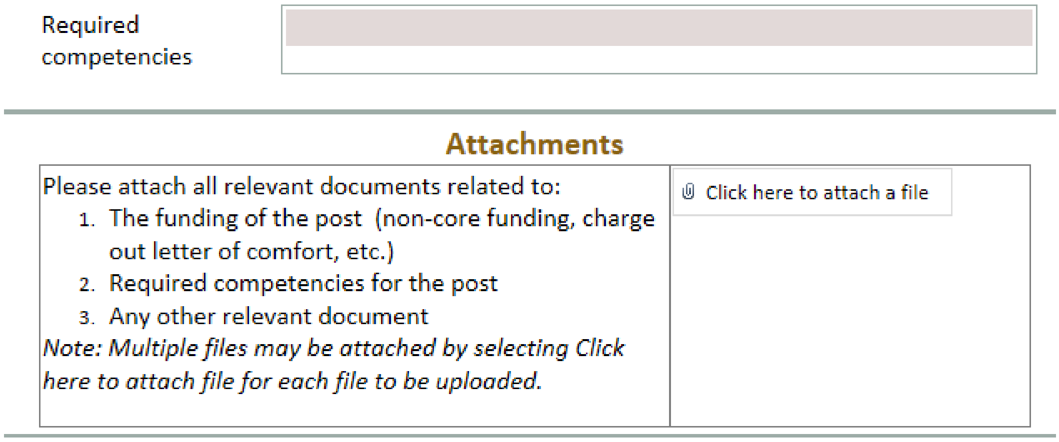
For Fixed Term and Specific Purpose contracts, five extra questions need to be answered: 1) Duration of the contract, 2) contract dates, 3) specific purpose of the employment, 4) reasons why Contract of Indefinite Duration will not be offered, and 5) reason for the request.



For 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.

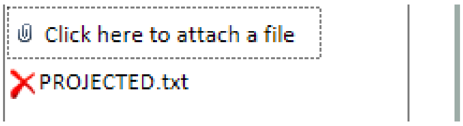


Required competencies	

Attachments

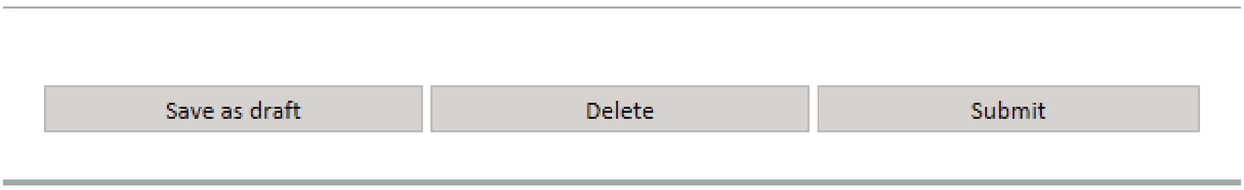
Please attach all relevant documents related to: 1. The funding of the post (non-core funding, charge out letter of comfort, etc.) 2. Required competencies for the post 3. Any other relevant document *Note: Multiple files may be attached by selecting Click here to attach file for each file to be uploaded.*	Click here to attach a file

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.

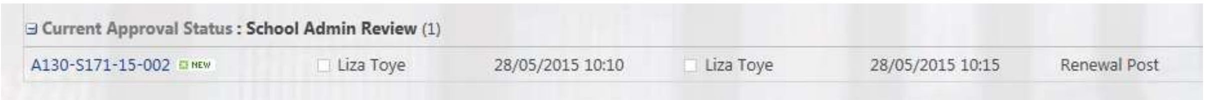


Submit will send the information to the next person in the chain – for Administrative areas this is the Head of Area, for Academic areas this is the School Administrator.

When you Submit, you will see this message:

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

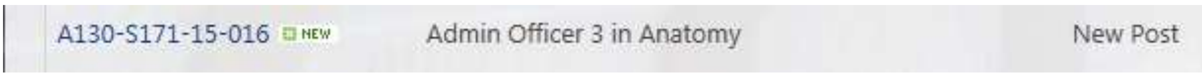
The saved form will be listed in the Staffing Requests History under "Current Approval Status: School Admin Review". Click on the file number link to reopen the form.



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.

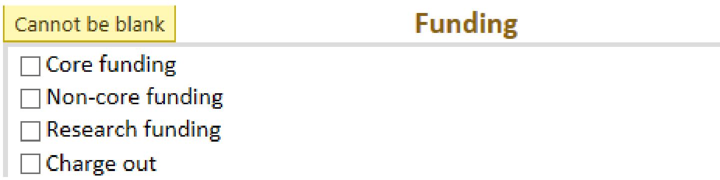
Error Messages when Submitting a Form

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.

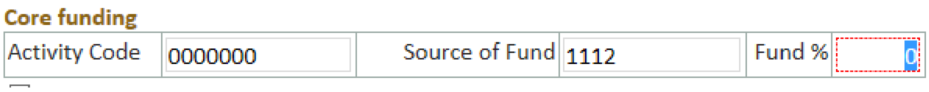
Mandatory fields

Cost Centre

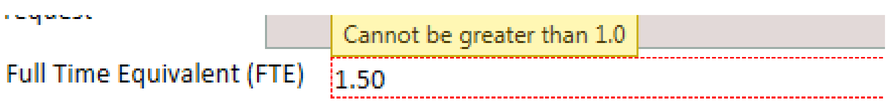
Funding



Fund %

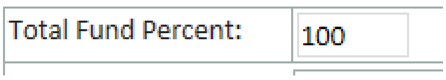


FTE

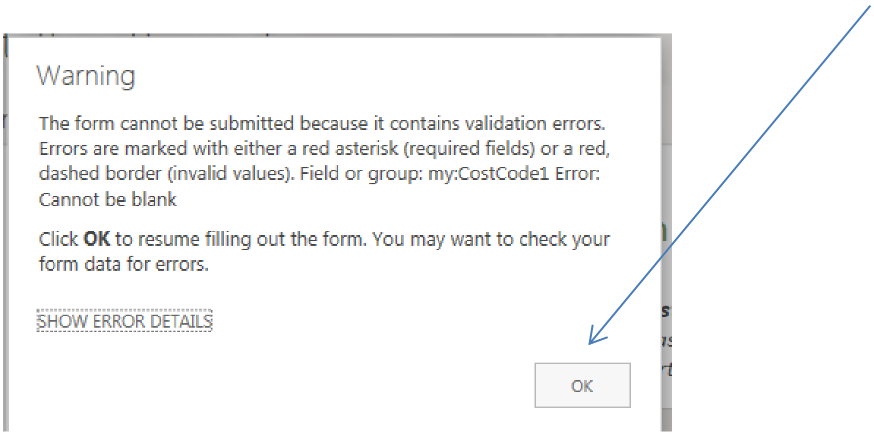


Does not total 100%

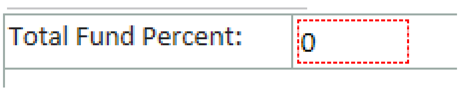
The form allows you to have more than one source of funds, each of which has a Fund %. These are totalled in the Total Fund Percent field, and they must add up to 100.



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.



Approval Stages

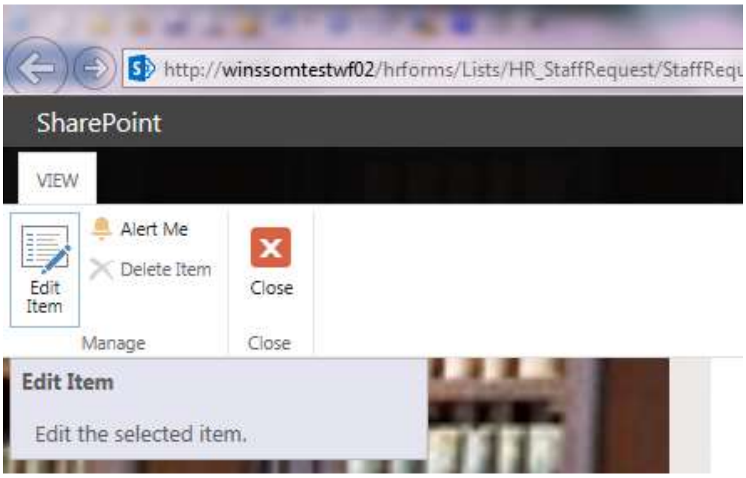
At each stage of the process, when the user hits "Submit" an email is sent to the next person in the process.

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

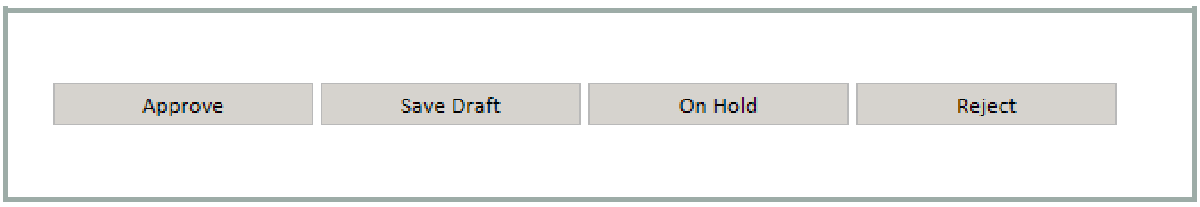
The user can click on the link (form id number) in the email. This will bring them directly into the HR Forms Hub and open the form in question.

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:



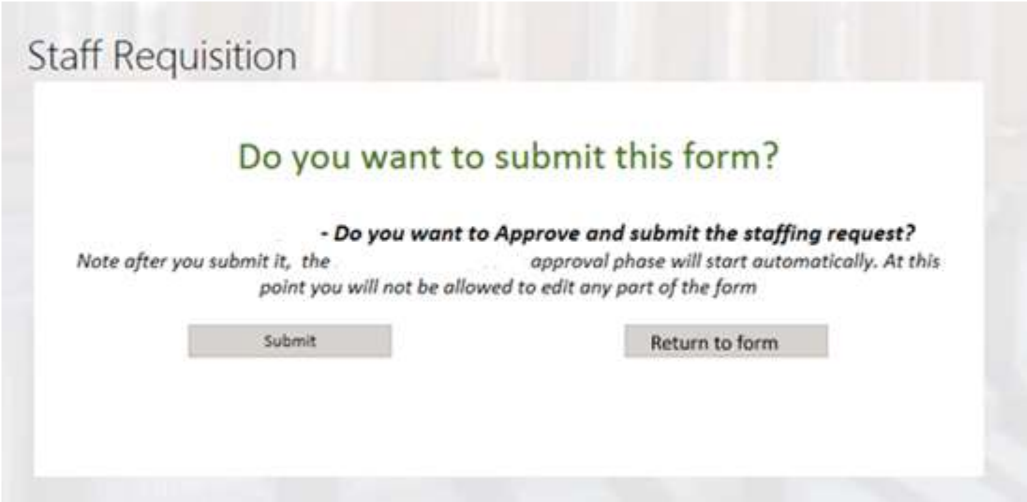
The user can make changes to the form, then choose from "Approve", "Save Draft", "On Hold" or "Reject". (Depending upon permissions: not all users have all four of these choices).



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:

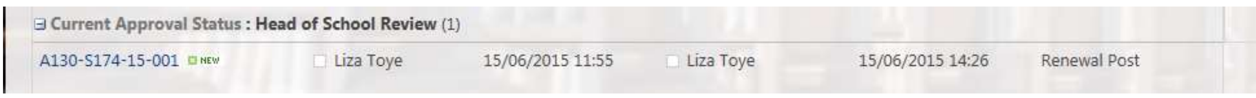


An email will be sent to the next person in the process.

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.



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

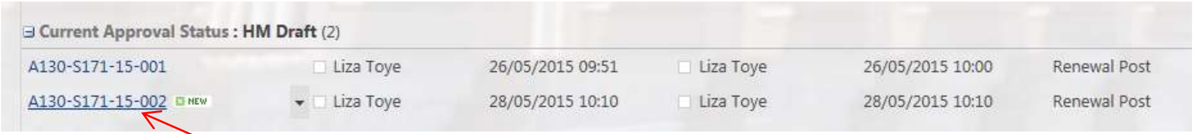
If the approver rejects the request, the process will complete, the form will close and an email will be sent to the Hiring Lead will be informing them that the request has been rejected. If the Hiring Lead wishes to start the process again, they will need to start a new form.

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

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

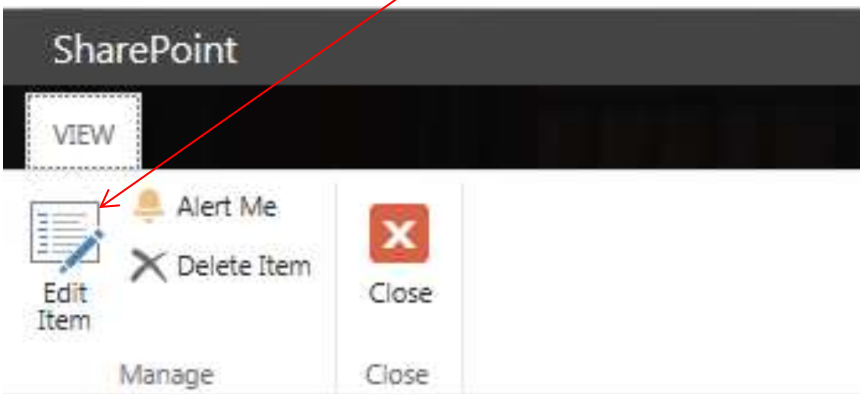
Editing

Open the form you wish to edit:

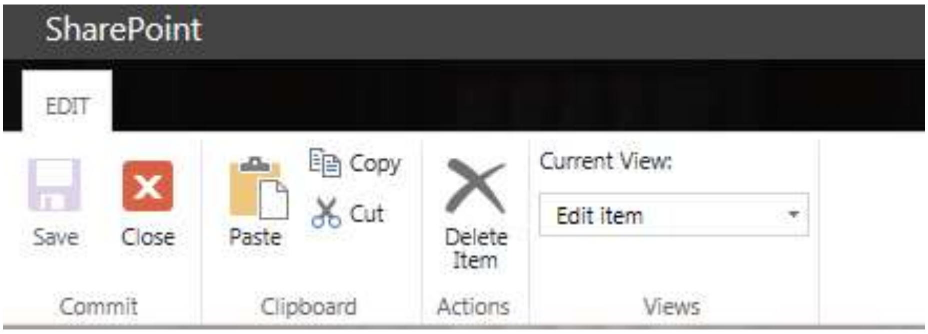


Click on the link to the form's reference number to open the form.

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.



Make the changes to the form as required, and then choose the appropriate button (Approve, Save as Draft, On Hold or Reject).