# Quick Guide to Online Staff Request Forms

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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:

```
Select your proxy to review / approve / reject Staffing Requests
ProxyPicker
Remove and Thank your Proxy -

Remove Proxy
```

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:
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 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**

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):

**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.

<table>
<thead>
<tr>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default</td>
</tr>
</tbody>
</table>

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

- PROFESSOR
- ASSOCIATE PROFESSOR
- SENIOR LECTURER
- SENIOR LECTURER CONSULTANT
- LECTURER (2012)
- LECTURER BELOW BAR
- LECTURER
- LECTURER (50%)

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

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

| 107BN |

The **pay scale range** will automatically populate.

| Salary Scale | €32540 to €56901 |
Replacement Type: Choose from the dropdown list.

<table>
<thead>
<tr>
<th>Adoptive Leave</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Career Break</td>
<td></td>
</tr>
<tr>
<td>Career Break - Special Incentive Scheme</td>
<td></td>
</tr>
<tr>
<td>Carers Leave</td>
<td></td>
</tr>
<tr>
<td>Failed Probation</td>
<td></td>
</tr>
<tr>
<td>Sick Leave - Half Pay</td>
<td></td>
</tr>
<tr>
<td>Leave of Absence</td>
<td></td>
</tr>
<tr>
<td>Maternity Leave</td>
<td></td>
</tr>
<tr>
<td>Special Leave of Absence</td>
<td></td>
</tr>
<tr>
<td>Shorter Working Year Scheme</td>
<td></td>
</tr>
<tr>
<td>Unpaid Maternity Leave</td>
<td></td>
</tr>
<tr>
<td>Unpaid Sick Leave</td>
<td></td>
</tr>
<tr>
<td>Termination</td>
<td></td>
</tr>
<tr>
<td><strong>Resignation</strong></td>
<td></td>
</tr>
<tr>
<td>Retirement</td>
<td></td>
</tr>
<tr>
<td>Contract Ended</td>
<td></td>
</tr>
<tr>
<td>Secondment</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
</tbody>
</table>

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

![Type of contract dropdown menu]

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.

![Contract details]

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.

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**
  - Core funding
  - Non-core funding
  - Research funding
  - Charge out
  - Source of Fund
- **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).

![Edit Item](image)

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.

<table>
<thead>
<tr>
<th>Approvers/Reviewers</th>
<th>Approval Status</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Head of Area</td>
<td>Liza Toye</td>
<td>Approved</td>
</tr>
<tr>
<td>Finance Partner</td>
<td>Liza Toye</td>
<td>Not Started</td>
</tr>
<tr>
<td>HR Partner</td>
<td>Liza Toye</td>
<td>Not Started</td>
</tr>
<tr>
<td>Dean/FEC</td>
<td>Liza Toye</td>
<td>Not Started</td>
</tr>
</tbody>
</table>

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”.

<table>
<thead>
<tr>
<th>Current Approval Status : Reject (4)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A130-S174-15-011</td>
</tr>
<tr>
<td>A130-S174-15-013</td>
</tr>
</tbody>
</table>
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).