

# **User Guide for Staff Request Application**

## **Users V1.3**

**06 September 2016**

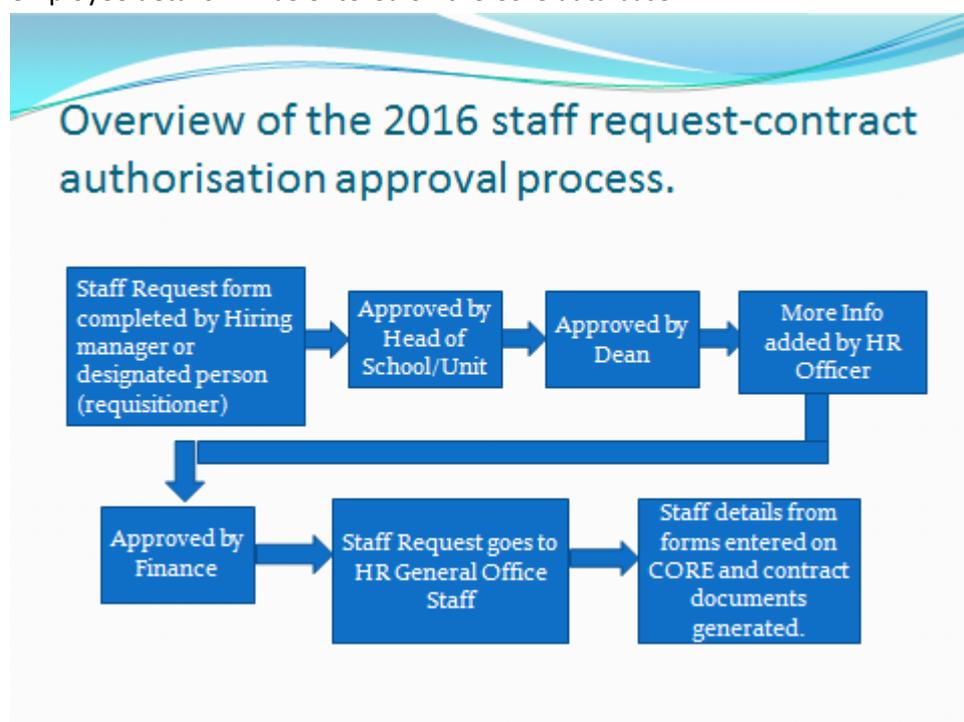
### **Contents:**

<b>Introduction:</b>	<b>2</b>
<b>CREATING A STAFF REQUEST- Requisitioners Guide:</b>	<b>4</b>
<b>Head of School/Unit &amp; Dean Approvers USER GUIDE:</b>	<b>11</b>
<b>HR Officer USER GUIDE:</b>	<b>12</b>
<b>Finance Approvers USER GUIDE:</b>	<b>15</b>
<b>HR General Office Staff USER GUIDE:</b>	<b>16</b>

## INTRODUCTION:

The staff request- contract generation process is about to be updated to provide for the approval of staff requests to move to an electronic format. The current staff-request contract authorisation form will be replaced by an on-line form.

The form will move through a workflow in the same way as the current paper based process, namely a requisitioner completes the form in the local school/unit. This will be routed to the local head of School via an email alert. The Head logs in and approves or rejects the requisition. If the requisition is approved then it gets routed to the appropriate Dean who can also approve or reject it. Assuming that a staff request is approved by a Dean it will then be routed to HR and Finance for approval. Once again, assuming that all is in order with the request a contract will be generated and the employee details will be entered on the Core data base.



In the event that a staff request is rejected at any stage in the process, everyone who was involved in the approval steps will be notified by an email alert. The reason for rejection must be entered by the Head/Dean/HRO or Finance Officer. If a minor change is required (such as a cost centre change) the requisitioner can simply copy the rejected request and make the necessary change before re-submitting it through the approval process as a brand new request.

The success of this workflow which replaces the paper based forms depends on the bulk of the information being entered correctly at the first stage by the requisitioner. It is not possible to add missing fields or amend a staff request after it has been submitted into the approval process. Your HR Officer will assist the requisitioners to complete the form by providing training and advice. In addition, user guides will be provided for all staff involved in the approval chain.

The system will provide visibility as to the status of every staff request from draft stage right through to final confirmed stage (where the contract has been signed off by the appropriate HR officer. The system is seen as an essential component in the re-engineering of HR processes and as a key enabler for the multi-campus university.

**Time limits:**

For a person to be paid correctly on the 28<sup>th</sup> of the month the staff request should have gone through the approval process and be approved at each step no later than the 5<sup>th</sup> of the month. This is to allow time for contract generation in HR followed by the employee signing the contract and returning it to HR no later than the 15<sup>th</sup> of the month. Payroll need all data in the system by the 15<sup>th</sup> of the month and the pay file goes to the bank on the 23<sup>rd</sup> of the month.

To assist schools and units to meet these challenging deadlines your HR officer will continue to issue you with an imminent actions report indicating any staff member who has an end date to a contract or an end date to a working arrangement (such as reduced hours) that is due to take effect by the 1<sup>st</sup> of the next month.

# CREATING A STAFF REQUEST- Requisitioners Guide

**Requisitioners: What you need to know:**

**Login to <https://staffrequest.dcu.ie> using your AD username and password. If you get a shibboleth error please try opening an incognito tab on your browser and enter the URL again.**

The electronic form is a direct replacement for the paper staff request-contract authorisation form. You will be required to enter the same information that you have been entering on the paper form with the added function that some of it is mandatory.

The form is divided into 4 sections under tabs.

Section 1: Location and reason for the staff request.

Section 2: Who is to fill the post

Section 3: Salary and work pattern information.

Section 4: Funding the appointment.

## Section 1: What is the request for.

The screenshot shows a web browser window displaying the DCU Staff Requisition Application. The browser address bar shows the URL <https://staffrequest.dcu.ie/Requisition#/Requisition/Create>. The page title is "Requisition" and the user is logged in as "Hello joseph.maxwell@dcu.ie". The form is divided into four sections, with Section 1 selected. The form fields are as follows:

- Staff Request For\***: A dropdown menu with "New Hire (Please attach employee CV)" selected. A "Select Files" button is next to it. A red error message box says "You must upload a C.V.".
- Legal Entity\***: A dropdown menu with "DCU" selected.
- Faculty/ Man. Unit\***: A dropdown menu with "Faculty of Engineering & Computing" selected.
- School/ Unit\***: A dropdown menu with "School of Mechanical Engineering" selected.
- Reports To\***: An empty text input field.
- Business Objectives\***: A large empty text area.

At the top right of the form, there is a "Notes" field, a "Help Enabled" checkbox, and "Submit" and "Save" buttons.



## Section 1

1. What is the request for? To the best of your knowledge please select from the drop down list one of the following options:
  - a. New Hire (must also attach a CV)
  - b. Rehire of a former employee
  - c. Change to an existing employee
  - d. Contract extension ( in the same role in the same School/Unit)
  - e. Follow on contract ( in a different role or different School /Unit from their current one).
2. Legal Entity: This form is designed so that it can be used by all of DCU, campus companies and the DDCU Educational Trust. These are separate legal entities from DCU so please select the appropriate legal entity for your staff request.
3. Faculty/Management Unit: Please select the appropriate Faculty or management unit to which your School/Unit or research centre is assigned.
4. School/Unit: Please select the appropriate School, research centre or unit to which the employee will be assigned.
5. Reports To: This is a mandatory field. Please enter the name of the person to whom the employee will report on a day to day basis. This could be the head of school/unit or a Principal Investigator in a research centre.
6. Business Objectives: This mandatory section should set out the reason in plain english as to why the employee is being offered a fixed duration contract instead of a permanent one. Up to 500 characters can be added and reason should end with the sentence “ This contract is therefore offered on such objective grounds”. For appropriate wording of the business objective please consult with your HR officer before submitting the form.
7. Notes Section at top of screen. This should normally be left blank. However, if you are creating a new staff request to replace a rejected one please place the number of the rejected request in the notes section together with a brief description of the change you made to get the requisition approved.

## Section 2: Who is the request for:

The screenshot shows a web browser window displaying the 'Staff Requisition Application' interface. The page title is 'Requisition' and it is divided into four sections: Section 1, Section 2 (active), Section 3, and Section 4. A 'Notes' field is at the top right. Below the sections, there are several input fields and dropdown menus:

- Staff ID \* (text input)
- Forename \* (text input)
- Surname \* (text input)
- Job Text \* (text input)
- Job Grade \* (dropdown menu with 'Select One...')
- Proposed Start Date \* (calendar icon and DD/MM/YYYY input)
- Proposed End Date \* (calendar icon and DD/MM/YYYY input)
- Employee Status \* (dropdown menu with 'Select One...')
- Sub Status \* (dropdown menu with 'Select One...')
- Work Permit (checkbox)

At the top right, there are buttons for 'Help Enabled', 'Submit', and 'Save'. The browser's address bar shows the URL: <https://mapscusra-uat.azurewebsites.net/#/Requisition/Create>. The taskbar at the bottom shows various application icons and the system clock displaying 17:26 on 17/06/2016.

## Section 2

8. Staff ID number: if you are raising the staff request for a rehire or a change to an existing staff member please enter their ID number in the box provided.
9. Job Text: This is the field where you enter the name of the job as usually known. For instance a person could have the working title of HR Officer (job text) but their grade may be senior administrative assistant (job grade). Other examples are Registry Assistant (job text) but the job grade could be secretary grade III.
10. Job Grade: Please enter the appropriate job grade from the drop down list of values. These job grades are long established grades or levels within the organisation.
11. Please enter the proposed start and end dates of the contract or working arrangement if it for a sabbatical, reduced hours, leave of absence etc.
12. Please enter the employee status and sub status from the list of values provided. If you select reduced hours or part-time fixed hours you will be asked to provide the work pattern and a reduced FTE or multiplier to show what percentage of the week they will be working.
13. If the person you intend to employ needs a valid work permit then please tick the box provided.

### Section 3: Salary Information (Total cost of contract)

The screenshot shows the 'Requisition' form in the DCU Staff Requisition Application. The form is divided into four sections: Section 1, Section 2, Section 3, and Section 4. Section 3 is currently active. The form includes the following fields and options:

- FTE \***: Input field.
- Multiplier \***: Input field.
- Salary Grade \***: Dropdown menu.
- Scale Point \***: Dropdown menu with the option 'Select Salary Grade first...'. There is also a checkbox for 'Personal Rate'.
- Proposed Gross Salary**: Input field with a Euro symbol (€).
- Pension Contribution**: Input field with a percentage sign (%).
- PRSI \***: Input field with a percentage sign (%).
- Total Cost (Prorata)**: Input field with a Euro symbol (€).
- Annual Leave on Core?**: Checkbox.
- Increments**: Checkbox.
- Flexitime**: Checkbox.
- Acting Up**: Checkbox.



### Section 3

1. FTE and Multiplier will usually be the same. FTE is used in pension calculations and Multiplier is used in pay calculations.
2. Salary Grade: in DCU we tend to use job grades and salary grades interchangeably but they are separate items and both need to be entered separately. On the previous tab you entered the Job grade and on this tab you are asked to select the appropriate salary grade from the list of values provided.
3. Scale-Point. For most established job grades there are associated salary scales with a number of incremental points on each scale. Please select the appropriate point on scale. For some research and other roles there is the flexibility to place a person on a personal rate. This means a rate that is personal to them and not on an exact fixed point on scale. This option is provided in the drop down list of values. If you select this option you will be asked to enter the annual salary amount that you plan to pay the employee. If you select a point on scale the annual amount will appear in the Proposed Gross Salary box.
4. Pension Contribution: For some research funded positions a certain percentage pension contribution is required. As of June 2016 this is 20%. Please enter this value if required to do so by the funding agency. For all other posts leave this blank.
5. The system will calculate the total cost of the job based on the salary, PRSI, employer's percentage contribution (if required) and the duration of the contract. This total amount will

be displayed in the Total Cost (pro-rata) Box. This is a key item that will be scrutinised by the Finance Approver to ensure there is sufficient funds remaining in the cost centre to fund the proposed staff request. Insufficient funds remaining is a key reason why staff requests will be rejected.

6. Increments: Select this tick box if increments are due to be paid.
7. Annual Leave on Core: Select this tick box and a new screen will open which will require you to enter the work group to which the person should be assigned for annual leave purposes only.
8. Flexileave: Select this tick box and a new screen will open which will require you to enter the work group to which the person should be assigned for annual leave and flexitime.
9. Acting Up: If a person is going to be acting up to a higher grade for a fixed period then select this tick box and a new series of options will open. Please enter the person's current grade and the grade to which they will be acting up.

## Section 4: Funding the Appointment

The screenshot shows the 'Requisition' form in Section 4. It features a 'Notes' field at the top, followed by navigation tabs for Section 1 through Section 4. Below these are six columns of input fields: Project Code, Percentage, Expenses Code, ER % Pension, Charged From, and Charged To. Each column has three rows corresponding to Project Code 1, 2, and 3. Below the columns are fields for Funding Source (a dropdown), Project Name, and Start/End of Funding for three cost centres (CC 1, CC 2, CC 3). The form also includes 'Help Enabled', 'Submit', and 'Save' buttons.



Section 4: Source of Funding. This section details how you intend to fund the post.

1. **Project Codes & Percentages:** If you intend to fund the post from just one cost centre then please enter the cost centre code on the Project Code 1 box followed by 100% in the percentage box provided. The form provides for up to three cost centres to be used to fund a post with varying proportions of each based on the percentages you enter in the appropriate percentage box.
2. **Expense Code:** This is a mandatory item and is used to distinguish various types of expenditure in Agresso. Please enter the appropriate Expense code in the box provided. If you enter the wrong one the staff request will be rejected by the Finance Approver. See list on table on page 10
3. **ER% pension:** this box is only used for certain research funded posts. Typically the employer pension contribution is 20% for research funded positions. For all other types of contract please leave this box empty.
4. **Charged From & Charged To dates:** Please enter the dates from which post should be charged against the relevant cost centre. It is mandatory to enter dates even if only one cost centre is being used.
5. **Funding Source:** Please select one option from the list of values provided. If you select Exchequer Funded then you must enter the name of the funding body. For DCU exchequer funded posts please enter DCU as the Funding Agency.

6. Project Name: For research funded posts please enter the name of the project being undertaken.
7. Area of Research: For research funded posts please enter broad area of research in which the project resides.
8. Start Date & End date of Funding sources: For research funded projects it is important that the funding agency has provided sufficient funds to cover the duration of the proposed staff request. Please enter the start and end date(s) for projecting funding.

<b>Expense Code</b>	<b>Expense Code Description</b>
20000	Academic salaries Permanent
20001	Academic salaries Temporary
20002	Academic salaries Part Time
20003	Tutors & Demonstrators
20005	Internship
20100	Research salaries Permanent
20101	Research salaries Temporary
20102	Research salaries Part Time
20103	Research assistant
20200	Technical salaries Permanent
20201	Technical salaries Temporary
20202	Technical salaries Part Time
20203	Technical overtime
20300	Operations salaries Permanent
20301	Operations salaries Temporary
20302	Operations salaries Part Time
20303	Operations salaries Overtime
20400	Admin salaries Permanent
20401	Admin salaries Temporary
20402	Admin salaries Part time
20403	Admin overtime
20802	Secondment
20803	Student casual
20806	Cleaning Staff Salaries
20809	Labour Costs
20817	DCULS Misc. LT Pay costs

# User Guide for Head of School/Unit & Dean Approvers

## Approval by School/Unit Head and Dean

Login to <https://staffrequest.dcu.ie> using your AD username and password. If you get a shibboleth error please try opening an incognito tab on your browser and enter the URL again.

This form replaces the current combined staff request-contract authorisation form. You will be presented with a list of staff requests requiring approval before contracts can be issued. You can filter the staff requests in many ways but the tabs across the top of the screen allow you to filter by department, cost centre, funding agency, employee sub-status, requisitioner and employee.

### What you need to check:

The form is divided into 4 sections under tabs.

Section 1: Location and reason for the staff request.

Section 2: Who is to fill the post

Section 3: Salary and work pattern information.

Section 4: Funding the appointment.

Please verify that the requisition is at the correct job grade and that the salary is what you expected it to be. Please check that the requisition is for the correct employee in your area and that any options such as annual leave on Core or flexitime have been ticked on or left off if appropriate.

The key financial information requiring approval is on tabs 3 and 4.

Tab 3 gives the salary grade, point on scale and a calculator which provides the total cost of the appointment pro-rata to the duration of the contract. Please check that the correct cost centres and Expense codes have been chosen.

Tab 4 gives the sources of funding. If the combined sources of funding are either insufficient or are not in place for the proposed contract duration to meet the total cost pro-rata on tab 3 then please reject the request. Once you have approved a request it will be made available for HR officer approval.

Please note that you cannot amend a staff request. If there is an error or you need to reject it for any reason please enter the reason why you rejected the request in the box provided.

# HR Officer USER GUIDE

**What the HRO needs to know:**

**Login to <https://staffrequest.dcu.ie> using your AD username and password. If you get a shibboleth error please try opening an incognito tab on your browser and enter the URL again.**

Assuming that the request is approved by both the Head of School and the relevant Dean then the request will appear in the system pending HR Officer approval. The HR officer will be required to validate some of the information supplied by the requisitioner and also to enter additional information to allow the person to be appointed to the relevant post in the CORE database hierarchy.

The form is divided into 4 sections under tabs.

Section 1: Location and reason for the staff request.

Section 2: Who is to fill the post

Section 3: Salary and work pattern information.

Section 4: Funding the appointment.

In addition to the four existing tabs, a new tab will be available for HR Officers called the HRO tab. It is highly recommended that the HR Officer should have Core open when completing the requisition so as to be able to check the employee details as provided on the requisition.



1. Post Number: Verify that the employee is either brand new or the correct existing employee or rehire on tab 2 by inputting the name on Core and search for that employee. If correct please enter the relevant post number which will be based on the job grade and the school/unit hierarchy.
2. Work Group: If the requisitioner has specified that the employee should have their annual leave managed on Core or if they are to avail of flexitime please verify the workgroup on Tab 3 and enter it again here.
3. Reason Code: Select the appropriate reason code from the drop down list of values.
4. Category Description: Enter the category from the List of Values Provided.
5. Paygroup: Select the appropriate paygroup from the list of values provided.
6. Enter the increment due date. This will be the anniversary date of the contract start date in most cases. Please take not of Haddington Road increment postponements. For part-time casual staff or any other role where increments are not part of the pay structure please enter the date as 01/01/1900. Note that increment due dates is now a mandatory item.
7. Enter the continuous service date that you wish to see appearing on the contract. For an existing employee or rehire you can obtain this by looking at Latest Start Date on the Appointment Details screen on Core. Please take account of any breaks.
8. Shift Type: Please select either 36 hr week or 37 hour week depending on the nature of the contract and the start date of the individual in the public service.
9. Pension details: Please select one of the options listed.

10. Opted Out ICP: Please check the person's record on Core under User Defined Details. If they have previously opted out of ICP than please tick this checkbox.
11. Leave Entitlement: Please enter the full leave entitlement for the job grade.
12. Annual Balance: Please calculate the pro-rata leave amount due to the individual for the first year depending on the duration of the contract on offer, e.g. 6 month contract then the annual leave is the jobgrade annual leaveentitlement/2.
13. Accrued Entitlement: if an existing DCU staff member is moving roles and if they have been on top of their existing scale for 3 years or more then please enter any accrued leave they may have (1 day for every 3 yrs on top of scale to a max of 3 days). If zero then enter zero.
14. Primary/Secondary post: Please indicate if the post should be entered on Core as a primary or secondary post.
15. Contract Template: Please select the appropriate one from the list provided.
16. Section 8 letter, Research letter, Contract extension letter: Please tick any of these that re relevant.
17. Confirm Sub-status: Please select the employee sub-status from the list of values. This should match what was input by the requisitioner on tab 2.
18. BC approval Number: If the post was sanctioned by Budget Committee please enter the approval number as provided on the Budget Committee Minutes.
19. When you have entered the data and approved the request, it will be submitted to Finance for Approval.
20. Please note that you cannot amend a staff request. If there is an error or you need to reject it for any reason please enter the reason why you rejected the request in the box provided.
21. When the HR general office print the contract and give it to you to sign please verify that the details on the contract match the staff request. When you have signed the contract change the status of the staff request to CONFIRMED. This marks the end of the process

## Finance Approvers USER GUIDE:

**Login to <https://staffrequest.dcu.ie> using your AD username and password. If you get a shibboleth error please try opening an incognito tab on your browser and enter the URL again.**

This form replaces the current combined staff request-contract authorisation form. You will be presented with a list of staff requests requiring financial approval before contracts can be issued. You can filter the staff requests in many ways but the tabs across the top of the screen allow you to filter by department, cost centre, funding agency, employee sub-status, requisitioner and employee.

### **What you need to check:**

The form is divided into 4 sections under tabs.

Section 1: Location and reason for the staff request.

Section 2: Who is to fill the post

Section 3: Salary and work pattern information.

#### Section 4: Funding the appointment.

The key financial information requiring approval is on tabs 3 and 4.

Tab 3 gives the salary grade, point on scale and a calculator which provides the total cost of the appointment pro-rata to the duration of the contract. Please check that this works as expected.

Tab 4 gives the sources of funding. If the combined sources of funding are either insufficient or are not in place for the proposed contract duration to meet the total cost pro-rata on tab 3 then please reject the request. Please note that you need to visually check that the funding is in place for the dates stated. There is no error trapping or background logic in place in the current version to prevent a requisitioner entering random dates or cost centres.

Once you have approved a request it will gain the status of request Approved and it will be made available for the HR General Office to generate the contract.

Please note that you cannot amend a staff request. If there is an error or you need to reject it for any reason please enter the reason why you rejected the request in the box provided.

# HR General Office Staff USER GUIDE:

Login to <https://staffrequest.dcu.ie> using your AD username and password. If you get a shibboleth error please try opening an incognito tab on your browser and enter the URL again.

Approved staff requests will be presented to you only after they have gone through all approval steps. You can filter the staff requests in many ways but the tabs across the top of the screen allow you to filter by department, cost centre, funding agency, employee sub-status, requisitioner and employee.

The role of the HR General Office is to enter the data from the staff request application into the Core database so that the staff member can be issued a contract and set up for employee history, payment and pension purposes. By selecting Excel Output for any give staff request you will get an excel file in your download folder that presents all of the information that you need to input into Core in the order in which you will need to work on it.

The gate keeper role of the HR General Office staff is an important one. It is vital to ensure that any data entered on Core is accurate and “sense checked”. Some check points for the data you will see presented on the excel sheet are given below:

1. Reason Code: This is the first item presented to you. If it is a green new joiner you know you will be entering data for a new employee. If you have any doubts about this when you see the name of the person look them up on Core before you enter any data. If it turns out that there is a problem inform the HR officer.
2. Planning the Post: The first section of the excel sheet gives you all the information you need to plan the post. When you pull up the post number on Core please tak a minute to check that the hierarchy (School & Faculty) and the Job grade(job title) match what you expected to see from the staff request. If they don't then you have been given the wrong post number so contact the HR officer.
3. Appointing the Person: If after planning the post all is correct and matches what you expected from the staff request then you can proceed to appoint the person. Please note that a number of items are now mandatory including **reports to** (enter the name of the person to whom the employee will report) and **increment due date**. If the employee status is permanent, temporary-pensionable or perm/coid then switch on the **pensionable indicator** when the FTE is not=0.
4. New additional information that must be entered includes information on work group and annual leave where this has been provided on the staff request. New instructions on how to do this will be issued shortly. A sample output file is shown on the next page.

**Reason Code** red rejoiner single scheme

<b>Planning the post</b>		
1	Post Number	ZX4500
2	Job Text	JOB_GRADE3
3	Faculty management Unit	DCU MU 1
4	School Unit department	DCU MU 1 School 1
5	Cost centre	d02202
6	Workgroup	Sports
7	Planned Start date	01/11/2016
8	Planned end date	31/12/2016
9	Post Type	Fixed Term Pensionable (TP)
10	Rate Type scale point or personal rate	
11	Planned Pay scale	ADMINISTRATOR 1V
12	Planned Point on scale	1
13	Salary amount	82245
14	Rate annual or hourly	73 - ADMINISTRATOR 1V - 1
15	Planned Multiplier	0.5
16	Post Sequence	
17	Managers Order No	BC2016-3

<b>Appointing the person</b>		
1	Reason Code	red rejoiner single scheme
2	Primary or secondary Appointment	Primary Post
3	Employee ID number	8035888888
4	Forename	Bill
5	surname	Smith
<b>Next Screen</b>		
6	Workgroup Description	sports
7	project total no of hours for PT temporary contract only	
8	Job Grade	JOB_GRADE3
9	Job Text	sports complex officer Fixed Term Pensionable (TP)
10	Employee Status	
11	Employee Sub status	Part-Time Fixed Hours (PTF)
12	Category	Non-academic
13	Sub category	
14	FTE	0.5
15	Pensionable Indicator Y N	Single Scheme
16	Reason Code description	red rejoiner single scheme
17	Business Objectives	Maternity cover
<b>Next Screen</b>		
18	Paygroup	PAY_GROUP1

19	Increment Due date	27/04/2017
20	Multiplier	0.5
21	Contract Template	CONTRACT_TEMPLATE3
22	Section 8 Letter	TRUE
23	Research Letter	TRUE
24	Contract Ext Letter	TRUE
25	Opted Out of ICP	TRUE
26	Change to Staff	REDUCED HOURS (RH)

27	Work Group Description	sports
28	Shift Type	SHIFT_TYPE1
29	Annual Leave Entitlement	LEAVE_ENTITLEMENT 3
30	Accrued Entitlement	2
31	Work Pattern	mornings only