



Electronic Recommendation For Occupancy (eRFO) User Guide

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1. Introduction

The electronic RFO system is intended to streamline the process of sending out Letters of Offer for the University. It is an online workflow system which creates, audits and completes Recommendations for Occupancy.

This system will fully automate the Recommendation for Occupancy process allowing areas to track the progress of the authorisation process and exactly when it arrives into Human Resources (HR). The system is directly linked to the HR information system (Alesco) and the electronic contracts system allowing some of the information to be automatically populated.

This user guide has been prepared as a guide to use the application. It details the steps involved for completing the following main tasks:

- Accessing the RFO form
- Saving a RFO
- Submitting a RFO
- Keeping track of the RFO status
- Approving/Rejecting a RFO

2. Accessing the RFO Form

Browser requirements: Internet Explorer (IE) 7 or above.

There is a single sign on (SSO) implemented from OASIS.



1. Login to OASIS
2. Select the HR Green Applications banner from the “important links” channel (pictured above).
3. This will display the landing page for the HR applications.
4. Select “Recommendation for Occupancy” menu item across the top.
5. Then select the “create RFO” menu item from the left hand list (shown below)

Screen 1

The screenshot displays the Curtin University website interface. At the top, the Curtin University logo is on the left, and navigation links for 'Contact us', 'Map', 'Help', 'OASIS login', and 'Find staff' are on the right. A search bar is also present. Below the header, a horizontal menu contains 'CURTIN HOME', 'STUDY', 'ABOUT US', 'RESEARCH', 'COMMUNITY', and 'POPULAR LINKS'. The main content area is titled 'RECOMMENDATION FOR OCCUPANCY (RFO)'. A sub-header 'Recommendation For Occupancy' is highlighted in a yellow box. On the left, a sidebar menu lists 'Create Recommendation', 'My Recommendations', 'Pending Recommendations', and 'HR Applications'. The main text area features the title 'Recommendation for Occupancy (RFO)' followed by a paragraph explaining the electronic RFO system's purpose and workflow. A second paragraph describes the form's use for appointments. At the bottom, a link for 'Electronic RFO User Guide [pdf - 1.59MB]' is provided.

RECOMMENDATION FOR OCCUPANCY (RFO)

Recommendation For Occupancy

Create Recommendation

My Recommendations

Pending Recommendations

HR Applications

Recommendation for Occupancy (RFO)

The electronic RFO system is intended to streamline the appointment process by allowing areas to complete the form, attach supporting documentation, forward to nominated signatories for approval, and then to Human Resources for processing. It is a complete workflow system which creates, tracks and delivers compliant RFOs to Human Resources which in turn can generate an electronic Letter of Offer.

This form is to be used when an area requires to appoint a person into an established position within the work area. It can be used for all new and further appointments or to vary an already existing appointment for a period of 2 years or more.

[Electronic RFO User Guide \[pdf - 1.59MB\]](#)

6. Selecting the “Create Recommendation” link will open the RFO form as shown below

Recommendation For Occupancy (RFO)

All fields in this form are mandatory unless otherwise specified. Please complete all mandatory fields before submitting your request.

Once you submit an RFO request, it will be sent for approval to the relevant parties (as you would specify on the existing paper form). HR will only process the request after all levels of approval have been obtained. You will be notified via email of any actions taken regarding your request once it is submitted.

Appointee Details

Recruitment Details

Remuneration/Checklist/Funding

Authorisation Details

Submitted

Appointment Details

Appointment method is either through an advertising process (competitive merit selection process) where a request to advertise has been sent to HR, or by direct appointment to a position (individual merit selection process).

Individual merit: the hiring manager carries out a documented assessment of an individual candidate to determine their merit for the position.

Curtin Research Fellowship: only to be used by R&D through the annual Curtin Research Fellowship process.

Appointment Method

- By Competitive Merit
- By Individual Merit/Curtin Research Fellowship

Employment Status

- Existing staff
- New staff
- Existing Staff Changing from Academic to General/Professional or vice-versa

Personal Details

Staff ID

Populate Staff Details

Gender

Personal Title

Last Name

3. Creating and Saving a RFO

To create a RFO and save the request for later, please follow the steps below.

1. Select the Create RFO menu item.
2. Enter all details on the appointee details page, ensuring you complete all mandatory fields.
3. Then select the “save” button at the bottom of the form.
4. This will save the RFO so that you can later access it again to either complete and submit or cancel.

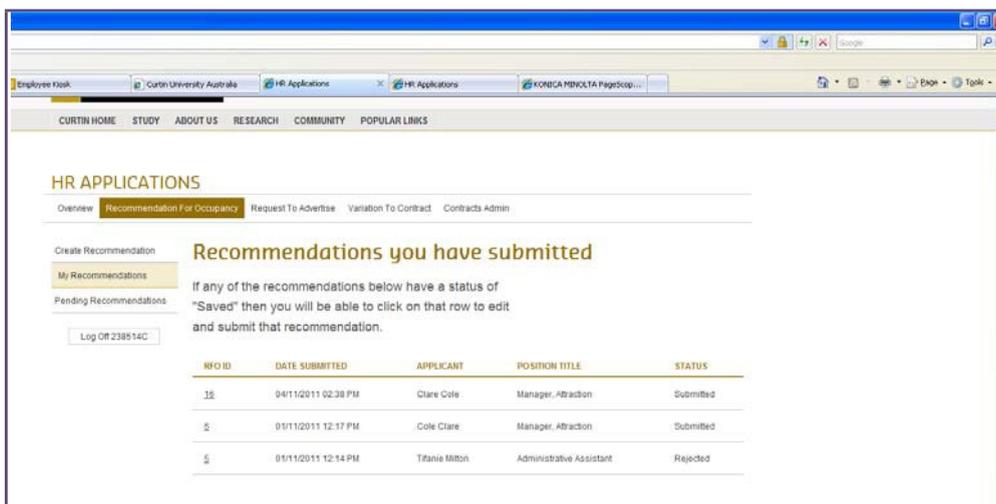
3.1 Viewing a saved RFO

Once you have saved a RFO you may access it at any time to amend the RFO details, submit the RFO or cancel it if it is no longer required.

To view a saved RFO please perform the following steps.

1. Login to OASIS to access the RFO application or login to the RFO application directly at <http://hrrfo.curtin.edu.au>
2. Once your are logged in, select the “my requests” menu item from the left navigation menu
3. This will display the list of RFO’s which you have created. See below.

Screen 3



4. Select the saved RFO which you need to access by clicking on the RFO ID number.
5. This will open the RFO and you will be able to edit/complete as required.
6. You may save the new changes, submit or cancel.

The previous and next buttons save the changes you make to a page, therefore all the mandatory fields on a current page need to be completed for the changes to be saved.

3.2 Cancelling a RFO

If you have created a RFO and saved it, you will be able to access it to make amendments. In order to cancel a saved RFO, please follow the steps outlined below;

1. Login to OASIS and access the HR Applications banner.
2. Alternatively you may wish to navigate directly to <http://hrrfo.curtin.edu.au>
3. Select “Recommendation for Occupancy” tab across top of page.
4. Select “my requests” menu item from the left navigation menu.
5. This will display a list of RFO’s which you have created.
6. Then select the saved RFO which you no longer require.
7. The RFO form will be displayed with the details that have been included previously.
8. At the bottom of the form select the “Cancel” button.
9. A dialogue box will be displayed to confirm removal of RFO.

Screen 4

The screenshot shows a web browser window displaying a form for a Recommendation for Occupancy (RFO). A modal dialog box is open in the center, with the title "The page at https://rfo.raduat.curtin.edu.au says:" and the message "By clicking Cancel, you will be removing this RFO from being available to you." The dialog has "OK" and "Cancel" buttons. The background form is partially obscured but shows the following details:

- Position Details:** For academic Management
- Staff Type:** Academic
- Position Number:** 3497727 (with a "Populate Position Details" button)
- Position Title:** Clinical Coordinator
- Position Category:** Curtin Research Contract
- School/Area:** School of Psychology and Speech Pathology
- Faculty:** Health Sciences
- Position Reports to Title:** Head of School
- Position Reports to Number:** 101132E
- Campus:** Bentley Campus
- C Level:** A20PSYHCS00000
- C Level Description:** Human Communication Science
- Position Type:** Research (dropdown menu)

At the bottom right of the form, there are "Cancel", "Save", and "Next" buttons.

- When you click on the ok button you will then be returned to your list of requests and this request will be deleted.

4. Submitting a RFO

In order to submit a RFO, you will need to create a RFO, complete all mandatory fields and select the Submit button. There are different staff member roles involved in the creation of a RFO, namely;

- Administrative Officer/Team Leader/Manager: person who will complete and submit RFO.
- Line Manager: Person who will normally be the first approver.
- Area/Faculty Approver: Normally either Director/Associate Director or Faculty Business Manager.

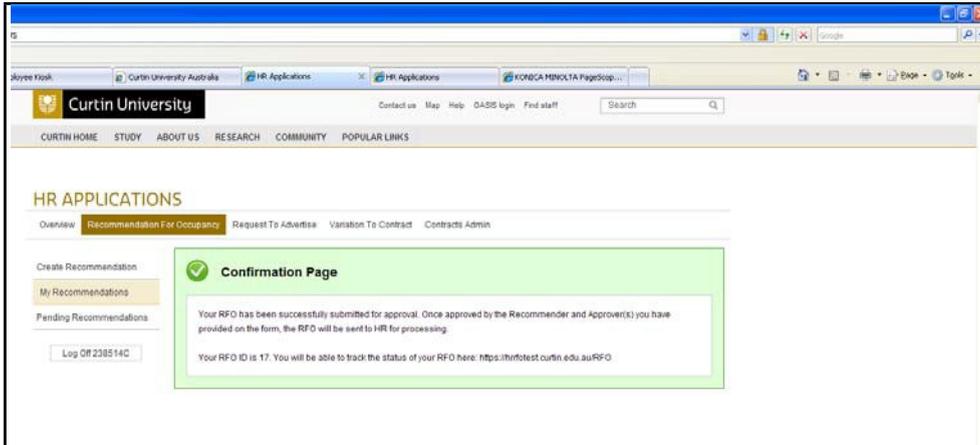
If required both approvers can be the same person, but normally this is not the case.

When submitting a RFO, you will be prompted with a message dialog box to confirm submission as this will trigger the workflow.

Screen 5

The screenshot displays the Curtin University HR Applications interface. The main heading is 'HR APPLICATIONS' with a sub-heading 'Recommendation For Occupancy (RFO)'. The form is titled 'Recommendation For Occupancy (RFO)' and includes a navigation bar with tabs: 'Appointee Details', 'Recruitment Details', 'Remuneration/Checklist/unding', 'Authorisation Details', and 'Submitted'. The 'Authorisation Details' tab is active. A 'Windows Internet Explorer' dialog box is overlaid on the form, displaying a confirmation message: 'By clicking Submit you will be immediately sending this RFO off for approval.' The form includes fields for 'Recommendation' (Staff ID: 244327A, Name: Kerry Donnelly), 'First Approver' (Staff ID: 244327A, Name: Kerry Donnelly), and 'Second Approver (Optional)' (Staff ID: , Name:). The dialog box has 'OK' and 'Cancel' buttons.

Screen 6

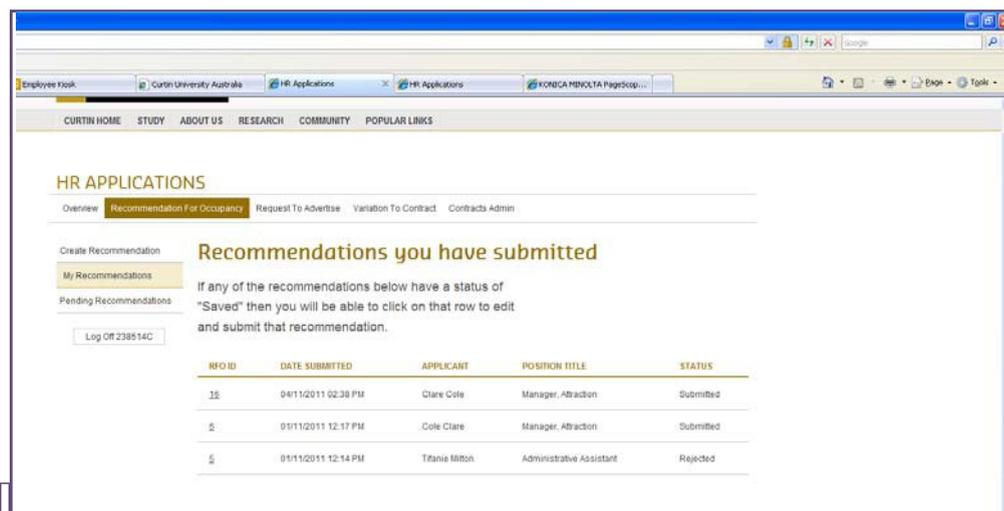


5. Keeping track of the RFO

The requestor is able to keep track of the RFO by following the steps below:

1. Login to OASIS and select the banner for HR Applications.
2. Alternatively navigate to <http://hrrfo.curtin.edu.au> and login using oasis staff login credentials.
3. Once logged in, select "my requests" from the left menu under the Recommendation for Occupancy tab as shown on the screen below.

Screen 7



4. Then select the submitted RFO which you want to keep track of.
5. The RFO details will be displayed in a read-only format. All the RFO details completed as well as a history of the progress will be displayed. An example is displayed in the following screen.

Screen 8

The screenshot displays the HR Applications interface for a Recommendation For Occupancy (RFO) #17. The page is titled "HR APPLICATIONS" and includes a navigation menu with options: Overview, Recommendation For Occupancy, Request To Advertise, Variation To Contract, and Contracts Admin. A user ID "Log Off 238514C" is visible in the top left. The main content area is divided into three sections:

- Overview:** Displays the status as "Submitted", the applicant name as "asdf asdf", and the school area as "Human Resources Vice Chancellory".
- Authorisation Details:** Shows the recommended by and first approver as "Kerry Donnelly (244827A) - Recruitment Advisor".
- Recommendation History:** A table showing the history of the RFO.

Status	Person	Date	Comments
Saved	238514C	04/11/2011 03:24 PM	Recommendation Created
Submitted	238514C	04/11/2011 03:31 PM	User submitted Recommendation.
Submitted	238514C	04/11/2011 03:31 PM	RFO Requiring Approval notification email sent to 244827A.

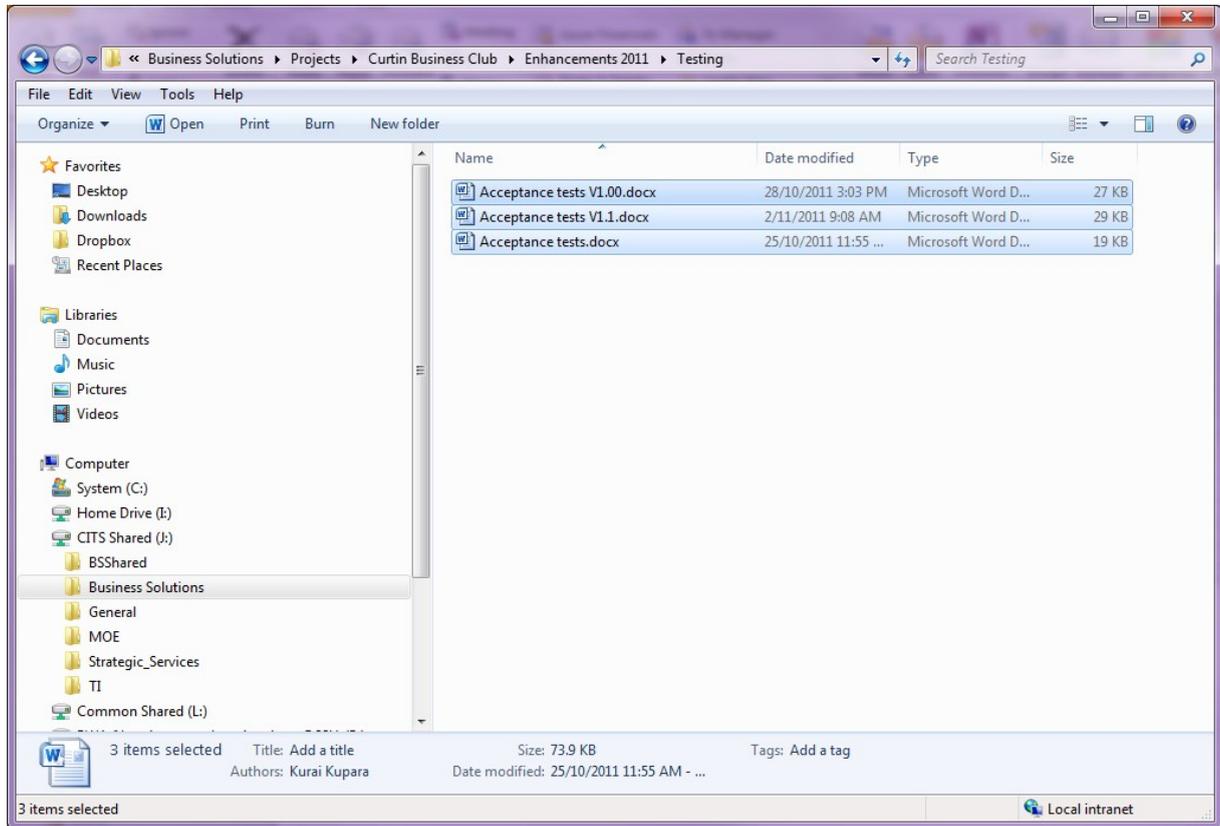
6. Approving or Rejecting a RFO

When a RFO is submitted the following happens:

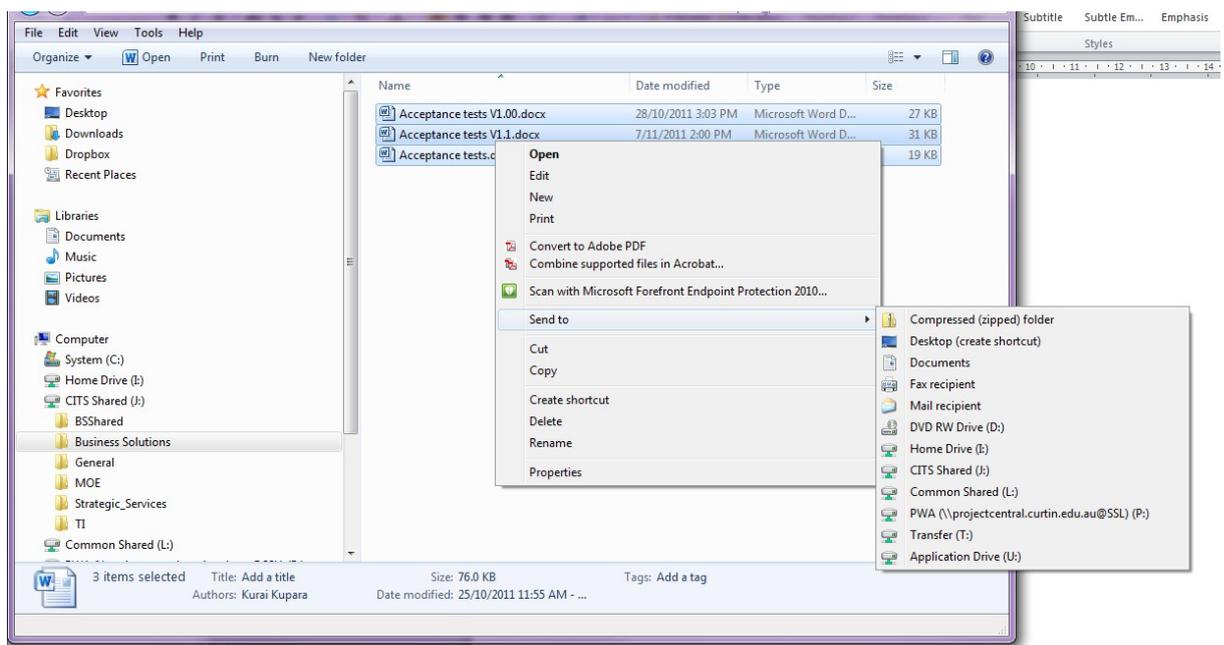
- Confirmation message is displayed on screen
- An email will be sent to the relevant approver(s) for approval/rejection. This will be detailed in the User Guide for Approvers.

7. Steps for creating and attaching a zip file

1. Select all the files to be included in the zip file attachment – as displayed on the screen below.



2. Then right-click the selection area. This will display a menu list as shown below:



3. Select the menu item "Send to" as shown above. This will display the list of items with "Compressedwith""Compress

"Compressed (Zipped) Folder".

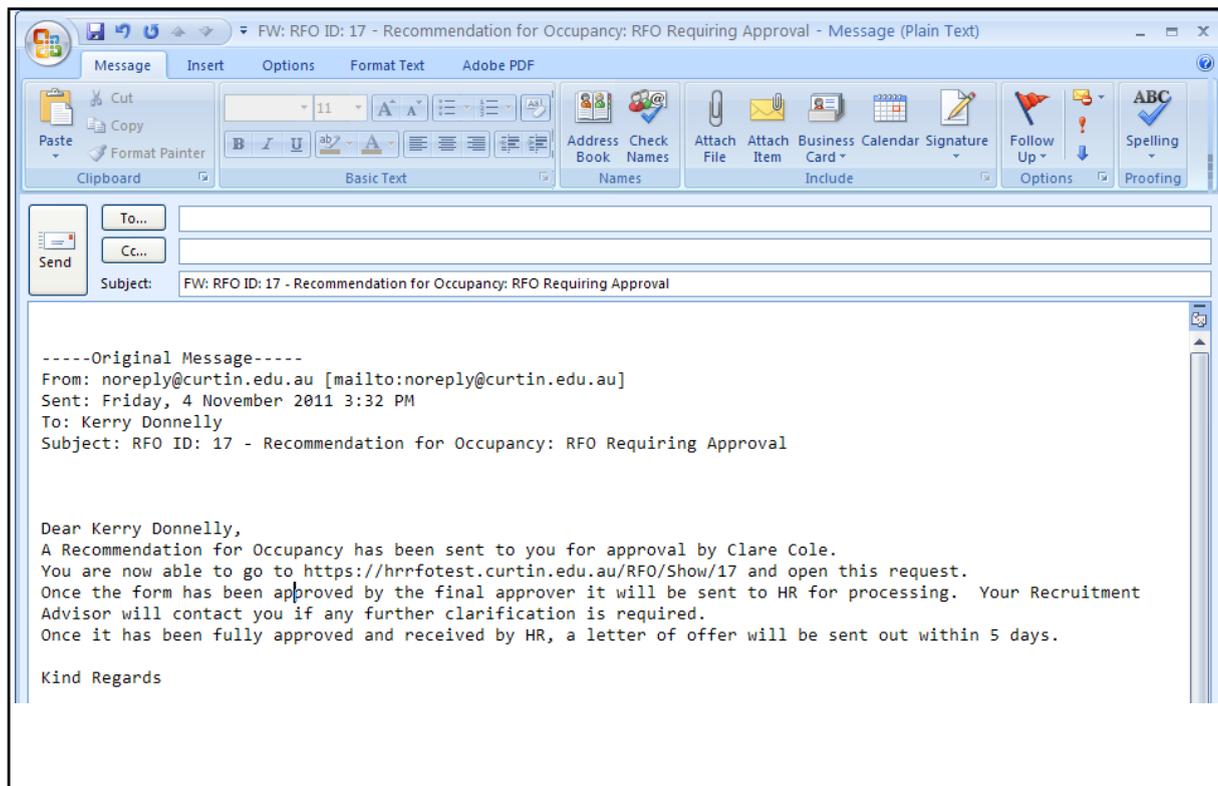
4. Select the "Compressed (zipped) folder item.
5. This will create a zip file with all the selected files within it. Selecting the zip file will display the relevant files it contains.
6. The name of the zip file will be by default the first attachment name. You may rename the folder.
7. You may now attach the zipped file.

8. Steps for Approvers

8.1 Email Notification

The Approver will receive an email which will indicate that an action is required by them. An example of the email is displayed below.

Screen 9

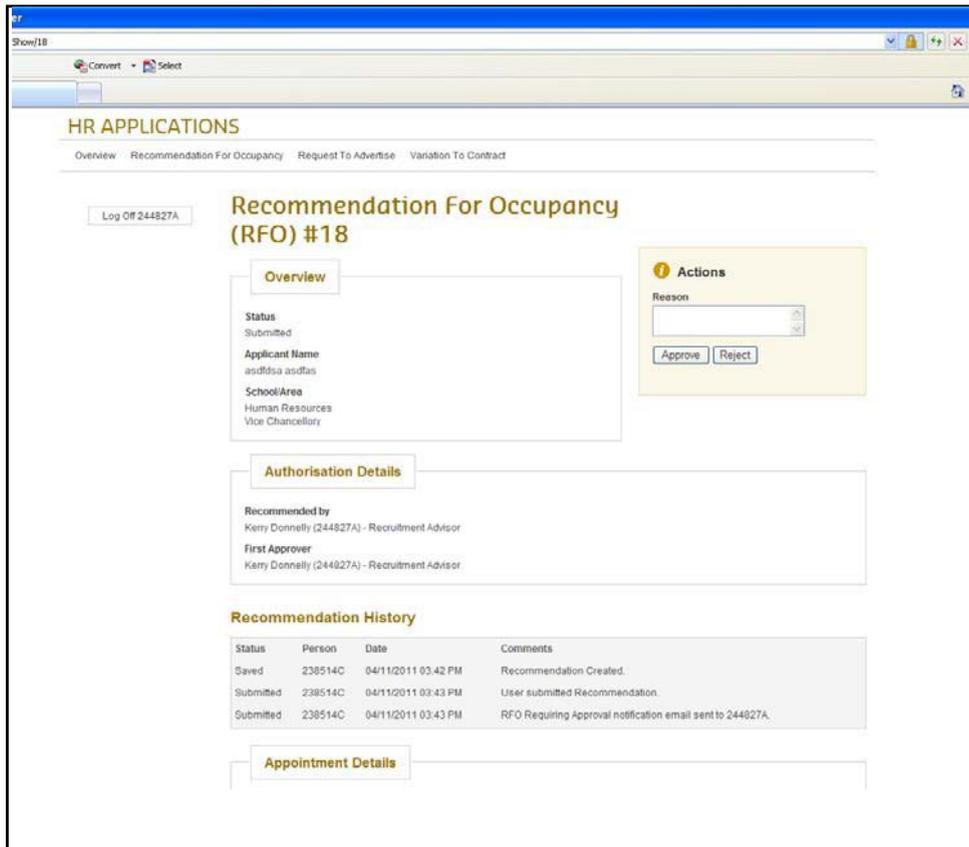


To access the approval page:

1. Select the link provided in the email. This will direct you to the login page of the application
2. Log in using your Oasis staff credentials.

The following page will then be displayed upon successful login.

Screen 10



The RFO details will be displayed as well as a history on the actions performed on the RFO.

8.2 Approving/Rejecting a RFO

From the previous section (Screen 10), you may select the “approve” button if all the RFO details are correct. No reason will be required for you to approve a RFO.

If the details are incorrect and you want to reject the RFO, then you will need to provide the reason for rejection.

Screen 11

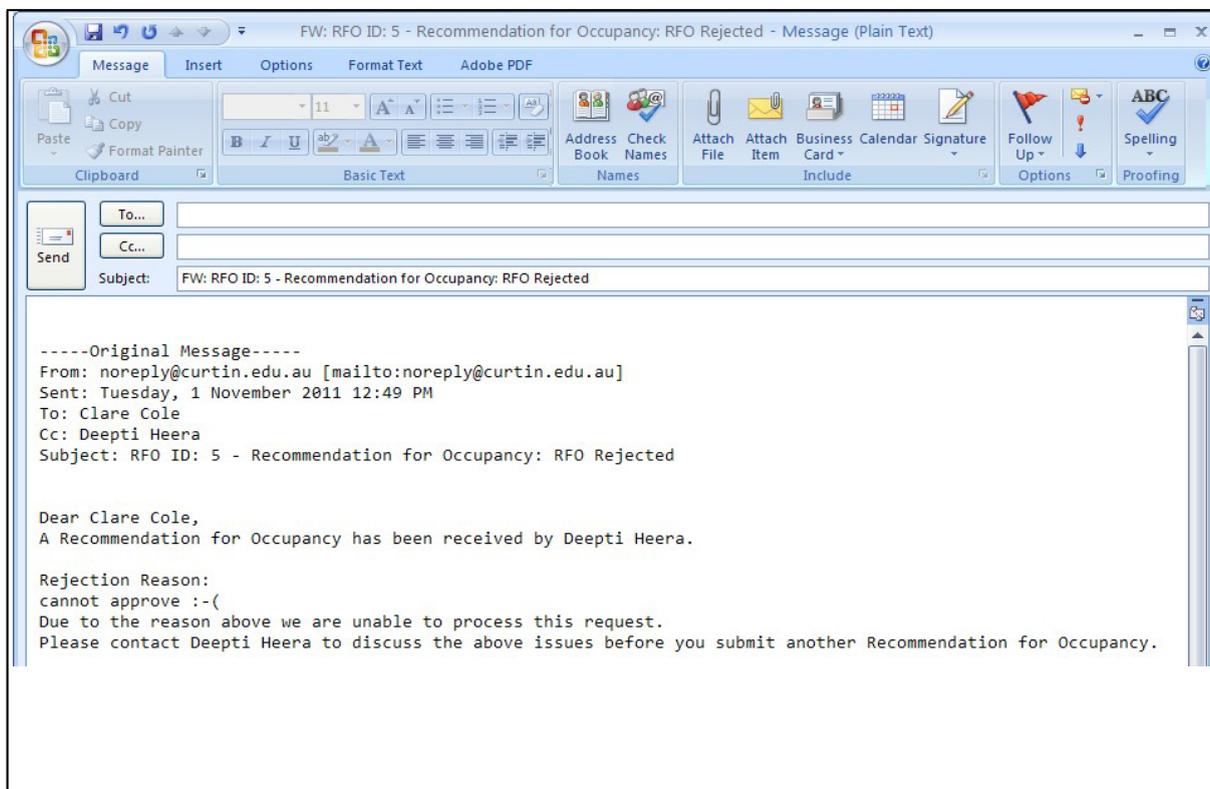
The screenshot displays a web application interface for HR Applications. The main heading is "HR APPLICATIONS" with a sub-heading "Recommendation For Occupancy (RFO) #18". A "Log Off 244827A" button is visible in the top left. The interface is divided into several sections:

- Overview:** Shows the status as "Submitted", the applicant name as "asdfsa asdfas", and the school/area as "Human Resources Vice Chancellory".
- Actions:** A yellow box containing a "Reason" input field and "Approve" and "Reject" buttons. A note states: "You must specify a reason when rejecting a recommendation."
- Authorisation Details:** Lists the recommended by "Kerry Donnelly (244827A) - Recruitment Advisor" and the first approver as "Kerry Donnelly (244827A) - Recruitment Advisor".
- Recommendation History:** A table with columns for Status, Person, Date, and Comments.
- Appointment Details:** A section header at the bottom.

Status	Person	Date	Comments
Saved	238514C	04/11/2011 03:42 PM	Recommendation Created
Submitted	238514C	04/11/2011 03:43 PM	User submitted Recommendation.
Submitted	238514C	04/11/2011 03:43 PM	RFO Requiring Approval notification email sent to 244827A.

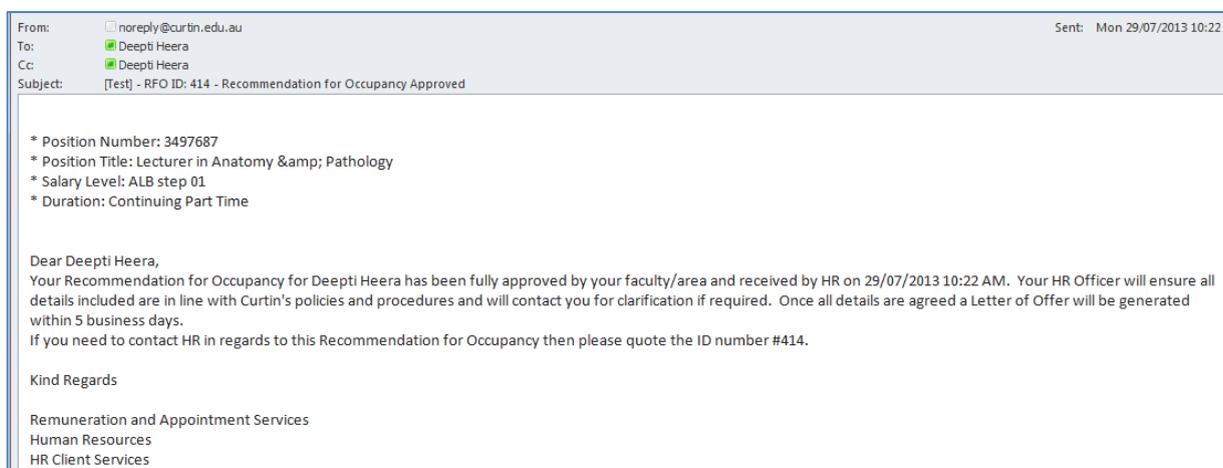
When you insert a comment and then click the reject button the following email will be generated and sent back to the requester the email (shown below) includes the rejection comment.

Screen 12



If you are confident that all information is correct and you want to approve you can click on the approve button. This will automatically send the RFO to HR for approval and action. It will also generate the email back to the Requester and Approver (see below).

Screen 13



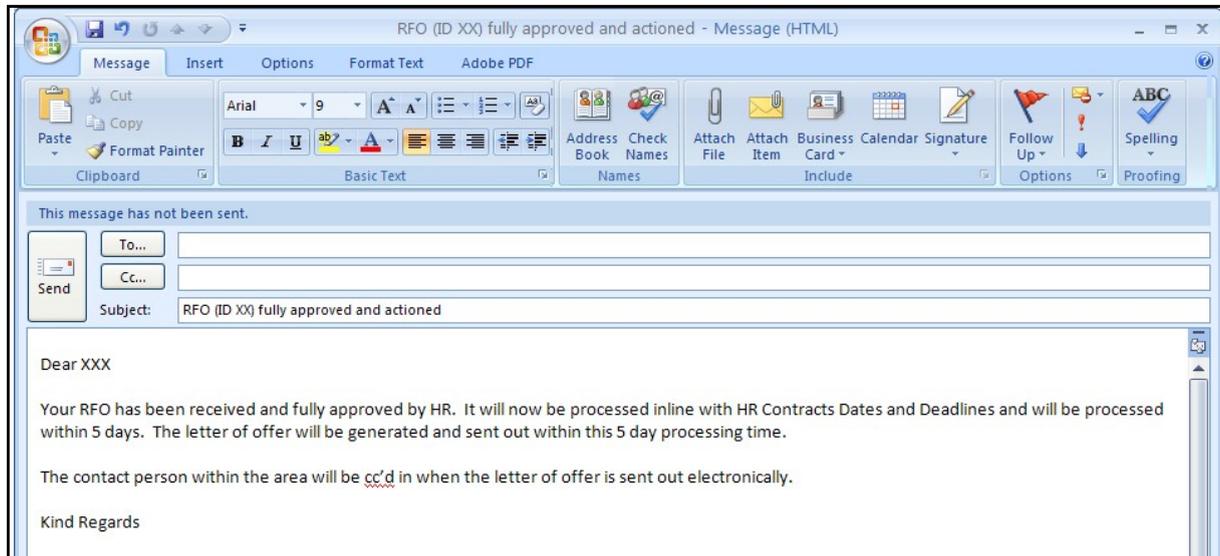
8.3 Reminder Emails

If you haven't approved or rejected a RFO for which you are an approver, an email will follow every two (2) days after the original email has been sent to you.

8.4 Final Acknowledgement Email

Once a RFO has been processed and approved by HR, an email will be sent to the Requester and Approver(s) confirming receipt. An example of the email is displayed below.

Screen 14

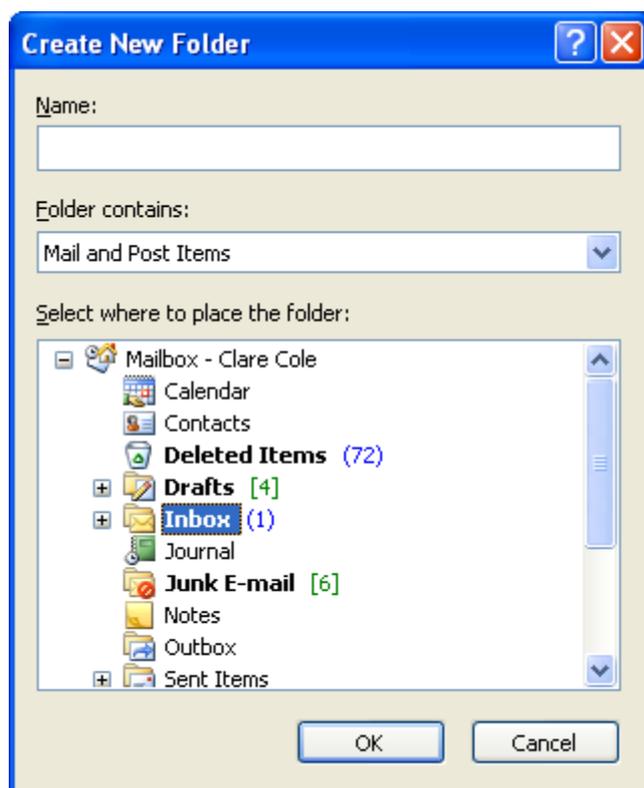


Likewise if the RFO is rejected by HR, then an email will be sent to the Requester and Approver(s) with the rejection reasons.

9.0 Creating a rule in your inbox to direct RFO/RTA emails

If you require all automated response/reminder emails generated from the electronic RTA/RFO system to go directly to a specific folder please follow the steps below.

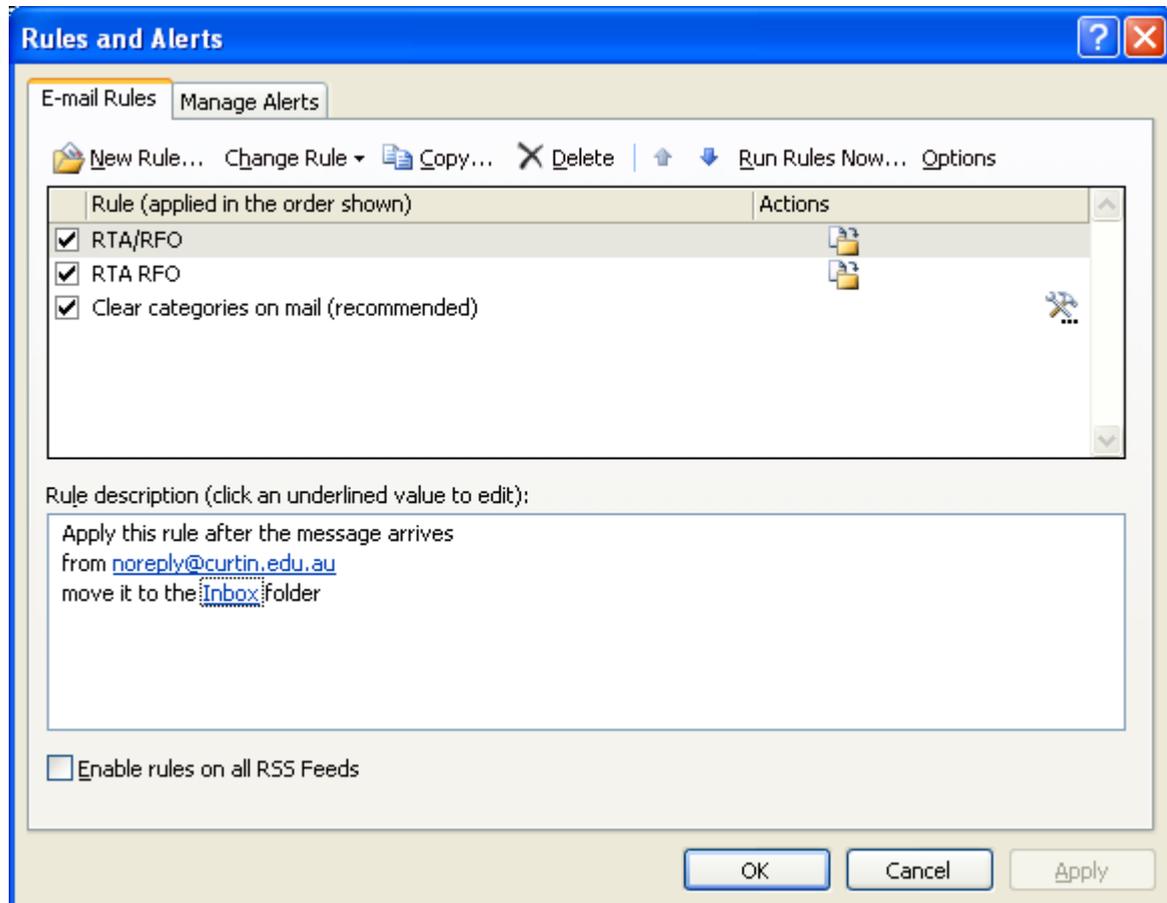
First you will need to create a new folder in your outlook ready for automated emails to be stored. This can be done easily by clicking on the File tab at top of outlook, then New, then Folder. This will prompt the create new folder box below and you will need to decide where you want the folder to sit and what you would like to name the new folder.



Then you can move to creating the rule to allow all automated emails from the electronic RTA/RFO system to be placed directly into that folder.

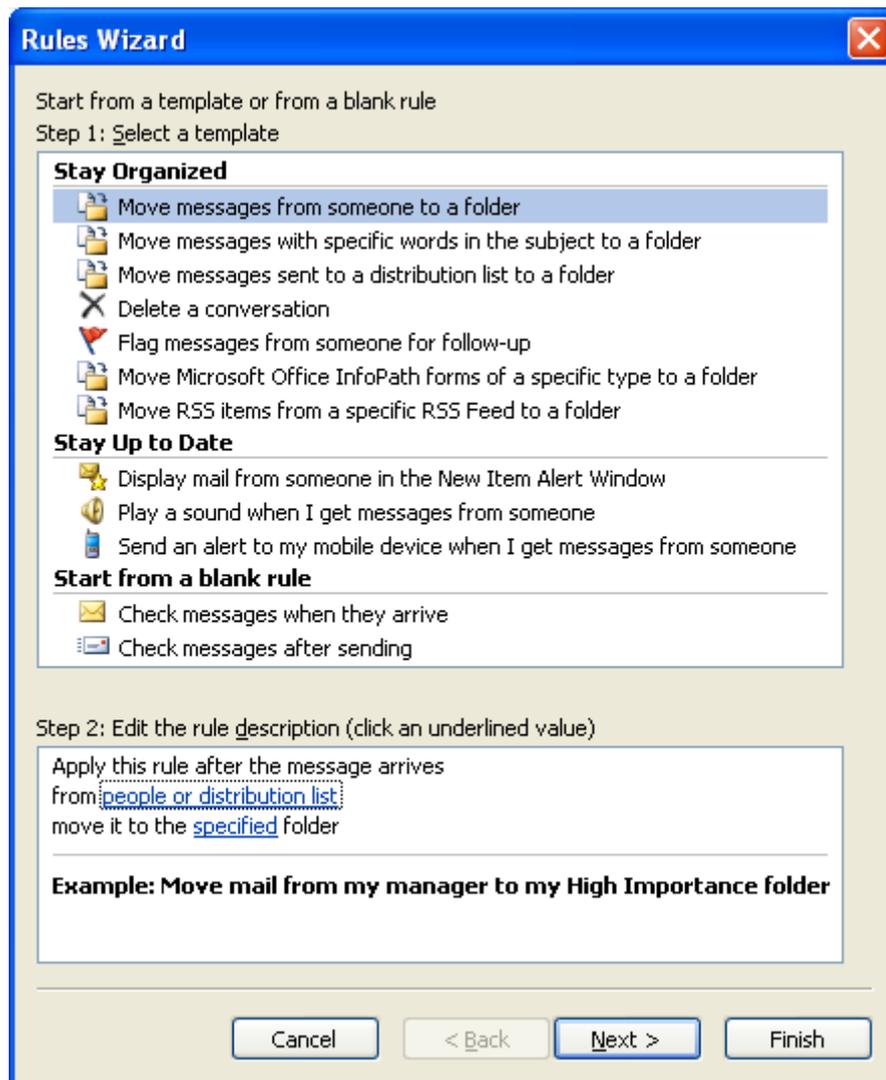
In microsoft outlook click on the tools tab across the top of outlook and from the drop down menu select "Rules and Alerts".

This will bring up the box below



Click on the New Rule box at the top left of this box and this will bring up another box below

Select the highlighted option of “move messages from someone to a folder”



In step 2. (above) click on the “people or distribution list”

This will bring up the rule address book. In the From box at the bottom left corner, type in noreply@curtin.edu.au this is the email address that all automated notification emails will come from. Click OK

Rule Address (g)

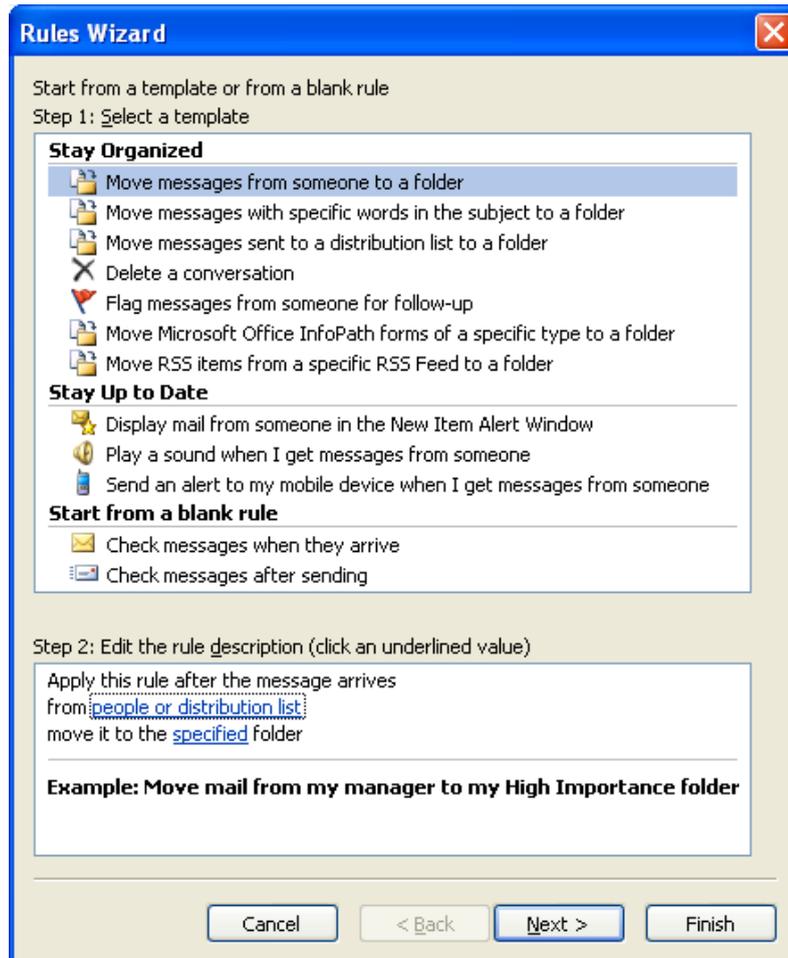
Search: Name only More columns **Address Book**

Global Address List [Advanced Find](#)

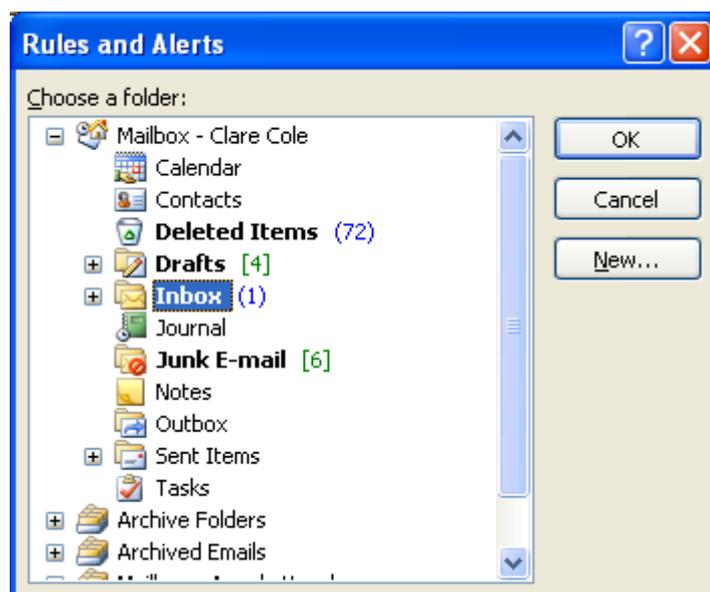
Name	Title	Business Phone	Location
68622F			
a2study	Generic Mailbox		
Aab	Generic Mailbox	3113	1011
AA3 Conference	Generic Mailbox		
Aamir Parkar	Sessional Academic		
Aaron Mohann	Sessional Academic	9266 3954	303.
Aaron Beagley	University Associate (Geon)	2015	
Aaron Beagley			
Aaron Chew	Abacus Lab Supervisor		
Aaron Chin	Systems Analyst	2856	101.1
Aaron Frost	Records Management Officer	7660	109.1
Aaron Gave	Sessional Academic	9674	303.
Aaron Himes	ID Card Operator		
Aaron Iim	Casual Events Assistant		
Aaron McDonald	Sessional Academic		402.
Aaron So	University Associate		
A...			

From->

Then click on the move it to “specified” folder part of step 2.

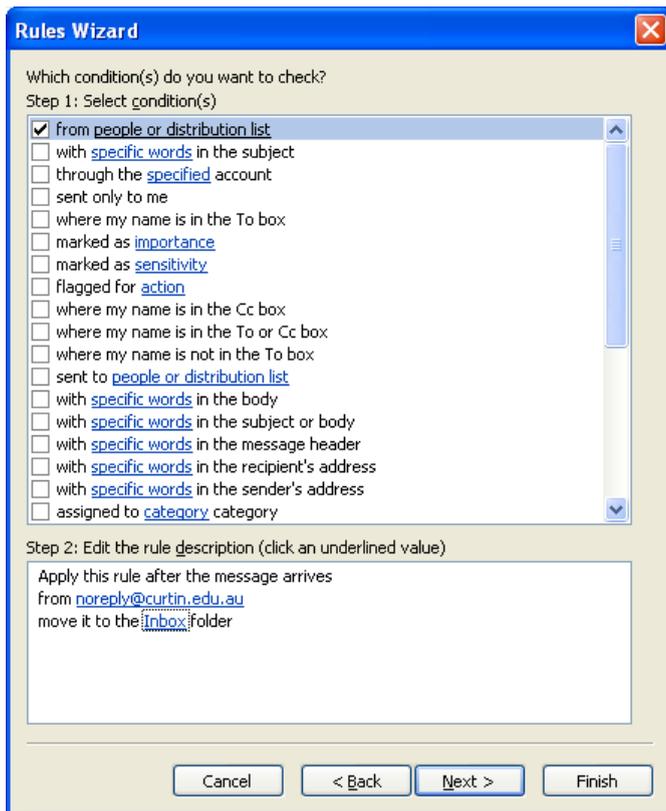


This will bring up the box for you to pick which folder to move the emails to then click on OK.

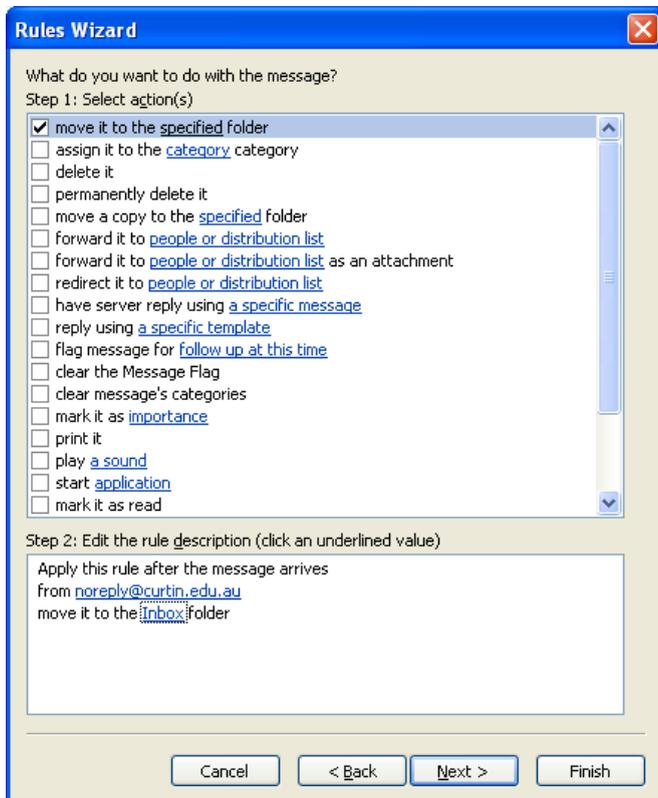


Then click Next

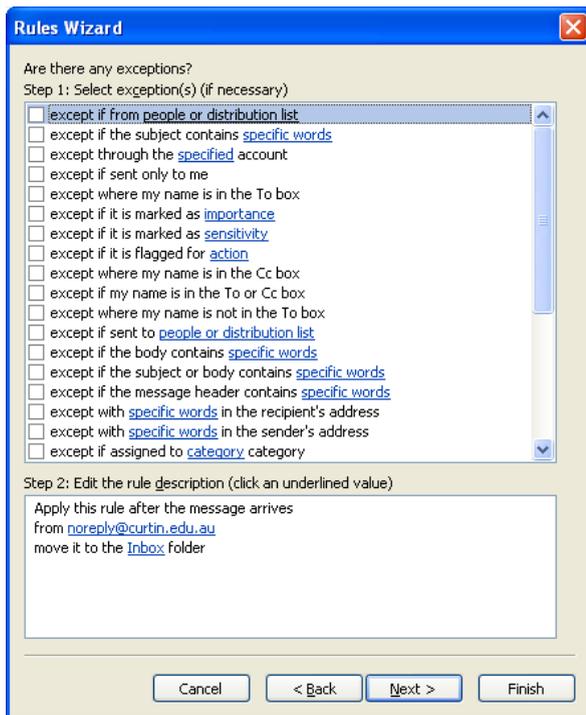
This will then bring up 2 check boxes where you can check/edit the process.



If you are happy with what is checked click next.

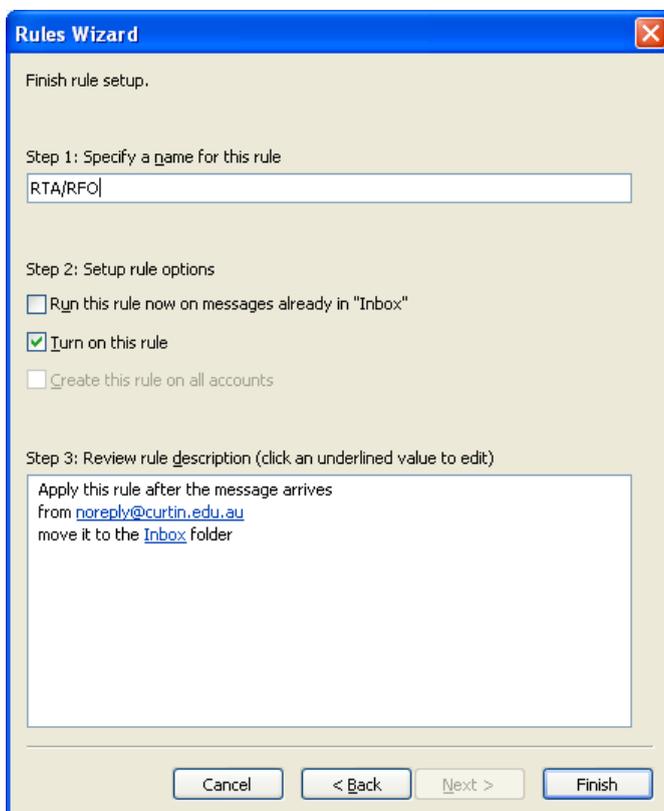


If you are happy with what is checked click next.

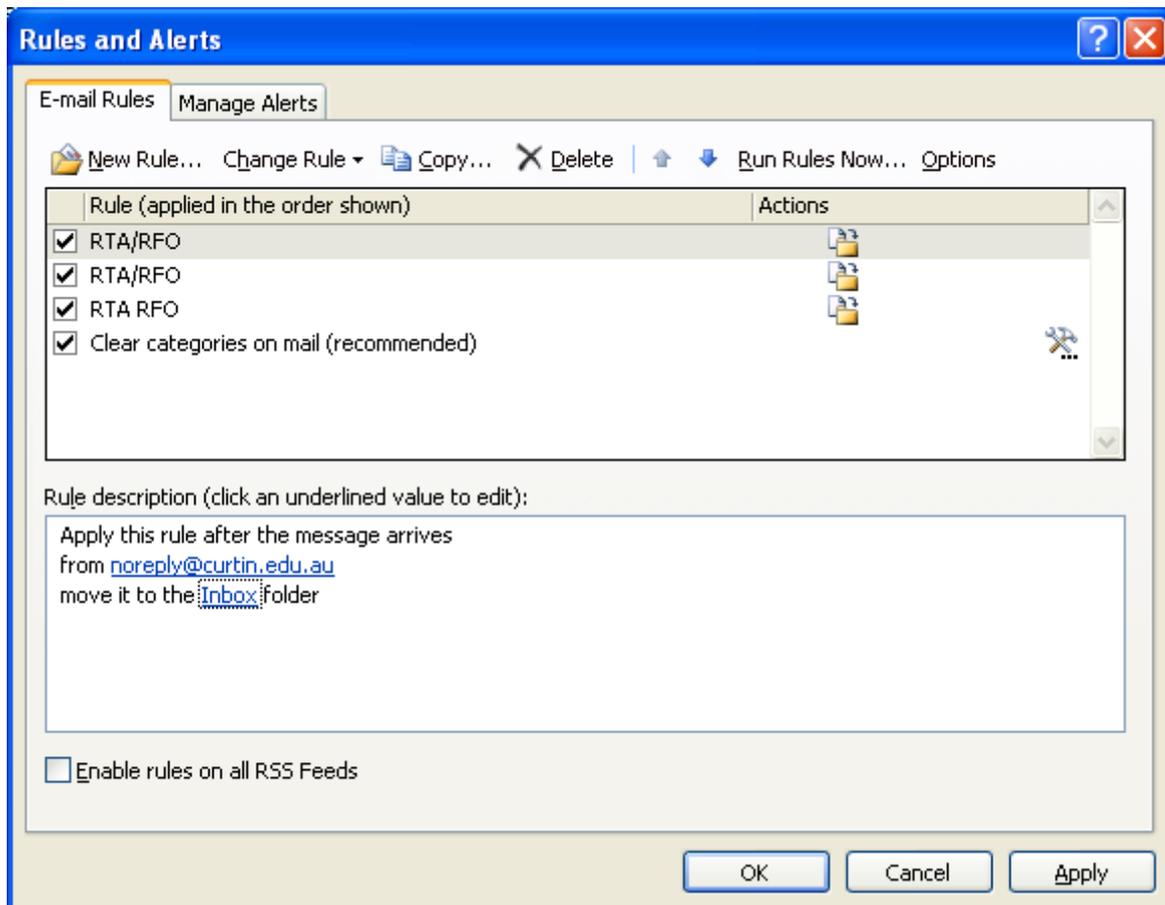


If you are happy with everything then click next.

It will then prompt you to name the rule. Call it what you want, what will be meaningful to you, something like "RTA/RFO for approval" Then click finish.



The rules will then show up in a check box check all details in the Rule description box and then click apply and then OK



You are now all set up so that all automated emails in regards to electronic RTA and RFO will go straight to the email folder you have created awaiting your action.