HR Monitoring System Guidance

Contents

Signing in

All members of staff should be able to log in to the HR Monitoring System using the following link: https://hrsystem.hud.ac.uk/monitoring/
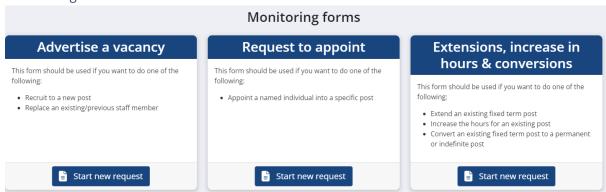
Your username and password should be the same details you use to sign into other University systems such as MyHR.

Navigating the system

Home

The homepage is split into two sections: monitoring forms and in-progress requests.
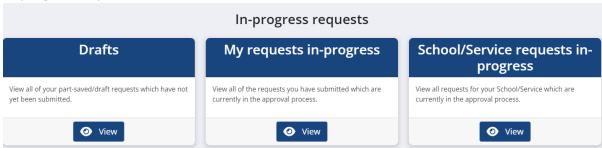
Monitoring forms

The monitoring forms section should be used when you would like to submit a new monitoring form. There are three different types of monitoring form available:

1. Advertise a vacancy – this form should be used when you would like to recruit to a new post or replace an existing staff member.
2. Request to appoint – this form should be used when you would like to appoint a named individual to a specific post.
3. Extensions, increase in hours & conversions – this form should be used when you would like to extend an existing fixed term post, increase the hours for an existing post, or convert an existing fixed term post to a permanent or indefinite post.

In-progress requests

The in-progress requests section allows you to quickly view any requests which are currently in-progress, as well as draft requests which you have not submitted yet:

4. Drafts – this shows all requests which you have started but not yet submitted. You can save requests as drafts and come back to them as often as you wish to update them.

5. My requests in-progress – this shows all requests which you have submitted but have not yet reached a final approval status.
6. School/Service in-progress – this shows all requests which have submitted for your entire School/Service but have not yet reached a final approval status. **Note: only users with the relevant permissions will be able to see this section.**

Sidebar

The sidebar can be used to quickly navigate the system and includes the following sections:

7. Home: this takes you back to the home page
8. My requests: this shows you all requests which you have ever submitted, including those which are currently in-progress as well as those which have been approved/rejected.
9. My tasks: this shows all of your in-progress requests which require additional information adding to them before it can progress.
10. Monitoring schedule: this shows the upcoming monitoring schedule.

My requests

This area will display all requests which you have created, including draft requests you haven't submitted yet, in-progress requests and requests which have reached a final approval status.

Monitoring ID	Request Type	Job Title	Meeting Date	Status
100214	Advertise a Vacancy	Administrator	6 July 2023	Awaiting Finance checks
100216	Advertise a Vacancy	Lecturer	6 July 2023	Awaiting HR/VCO approval
100105	Advertise a Vacancy	Technician	20 July 2023 (provisional)	Draft

From here you can see some basic details for each request. You can filter the results by using the search box and also export the table to a CSV file if required.

My tasks

This area shows any requests which are at a stage where you may need to action or provide information for.

My tasks
This page displays any tasks which are oustanding. If you have multiple roles within the system then you may see several boxes below.

My requests with queries	School/Service Tasks	Dean/Director Tasks
Requests you have submitted which require additional information.	Requests which are awaiting approval by the School/Service Internal Checker.	Requests which are awaiting approval by the Dean/Director.
7	25	2

Clicking on the number below the relevant box will show all requests relating to that particular section. **Note: only users with the relevant permissions will be able to see the School/Service Tasks and Dean/Director Tasks sections.**

Monitoring schedule

This section shows the upcoming monitoring schedule, including key dates such as how soon the request could be advertised and how soon the interviews could be held.

Dean/Director approval deadline (5pm)	Request considered on	Can be advertised as early as	Closing date as early as	If you return shortlisting paperwork by	You can interview no earlier than
03/07/2023	06/07/2023	14/07/2023	27/07/2023	02/08/2023	14/08/2023
17/07/2023	20/07/2023	28/07/2023	10/08/2023	16/08/2023	28/08/2023
31/07/2023	03/08/2023	11/08/2023	24/08/2023	30/08/2023	11/09/2023
14/08/2023	17/08/2023	25/08/2023	07/09/2023	13/09/2023	25/09/2023
28/08/2023	31/08/2023	08/09/2023	21/09/2023	27/09/2023	09/10/2023
11/09/2023	14/09/2023	22/09/2023	05/10/2023	11/10/2023	23/10/2023

The row highlighted in yellow indicates the monitoring meeting that any newly submitted monitoring requests would be assigned to, providing that they were authorised by your Dean/Director by 5pm today.

Submitting a request

You can begin completing a monitoring request by clicking the "Start new request" button for the relevant monitoring form from the home page. Here you will be taken to a blank form for you to complete. You can either complete minimal information (job title and School/Service) and choose to save the request as a draft at the bottom of the page. This will enable you to come back to the request at a later date, either via the My requests page or by accessing the drafts section from the home page. Once you have completed the form press the Submit button to start the approval process. Fields marked with a red asterisk * denotes a mandatory field and you will be unable to submit the request until these fields have been completed.

Financial details

All monitoring forms include a financial details section similar to the image below:

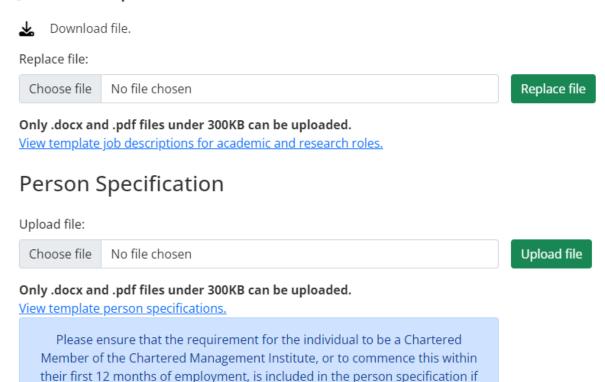It is not mandatory to complete this information prior to submitting the request.

Uploading documents

Some requests require documents to be uploaded in order for an approved request to progress. You are able to upload these documents at any time from the time you create a new request by using the Attachments tab found near the top of the monitoring form.

This page will allow you to upload documents such as job descriptions and person specifications, which you can also download later.
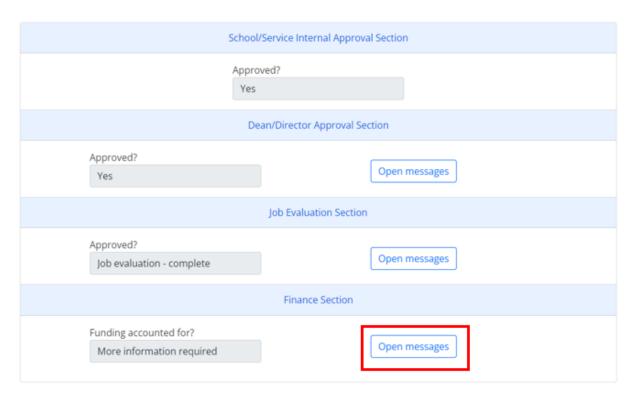
Job Description

⬇ Download file.

Replace file:

| Choose file | No file chosen | | Replace file |

Only .docx and .pdf files under 300KB can be uploaded.
View template job descriptions for academic and research roles.

Person Specification

Upload file:

| Choose file | No file chosen | | Upload file |

Only .docx and .pdf files under 300KB can be uploaded.
View template person specifications.

> Please ensure that the requirement for the individual to be a Chartered Member of the Chartered Management Institute, or to commence this within their first 12 months of employment, is included in the person specification if the position you are recruiting to has line management responsibility.

Please note that the documents you can upload will vary depending on the type of request you are making.

Providing additional information

You may receive an email when additional information has been requested at various stages of the approval process. To provide a response, navigate to the request in question and scroll down to the bottom of the page. You should see the request is at a stage of "more information required" and have an option to open the associated messages.

Once you have opened the associated messages you will be able to see submit a reply:
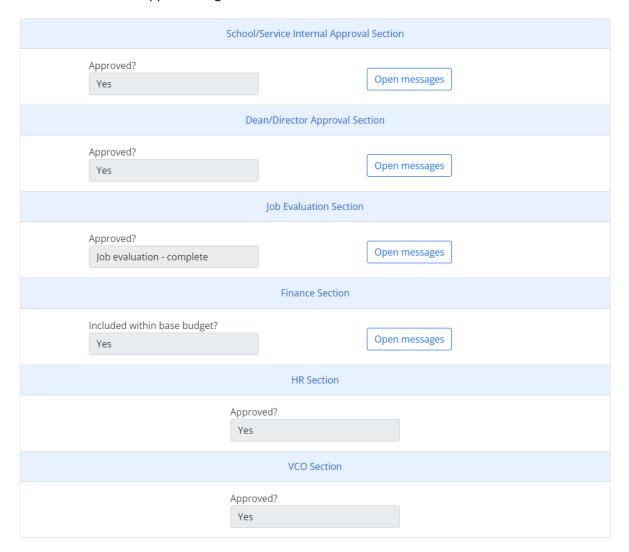

Once you have submitted a reply this will trigger an email to the relevant team informing them.

Checking the status of an in-progress request

You can check what stage of the approval process your request is at by navigating to the request and checking the timeline at the top of the page:

Monitoring Request 123456

You can also scroll down the page to see each stage, as well as view any messages which are associated with each approval stage:

School/Service Internal Approval Section	
Approved? Yes	Open messages

Dean/Director Approval Section	
Approved? Yes	Open messages

Job Evaluation Section	
Approved? Job evaluation - complete	Open messages

Finance Section	
Included within base budget? Yes	Open messages

HR Section
Approved? Yes

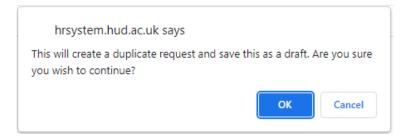| VCO Section |
| --- |
| Approved?
Yes |

Duplicating a request

Once you have saved a request you are able to create a duplicate request from it. Towards the bottom of the request, you will see a "Duplicate" button.
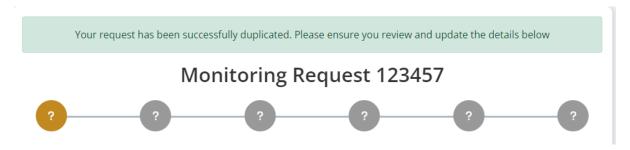
Enter replacement details here (if applicable)

Employee being replaced	Reason for replacement	Leaving date
	Select an option	dd/mm/yyyy

Duplicate

Pressing this button will create a new draft request, using the details of the original request as a template.

> hrsystem.hud.ac.uk says
>
> This will create a duplicate request and save this as a draft. Are you sure you wish to continue?
>
> **OK** Cancel

Press OK on the prompt shown above to create the duplicate request.

Your request has been successfully duplicated. Please ensure you review and update the details below

Monitoring Request 123457

? — ? — ? — ? — ? — ?

This can be particularly useful if you are submitting multiple similar requests, or if you would like to submit the same request that you submitted several months/years ago. **Please note that attachments will not be duplicated and will need to be uploaded separately.**

Approval process

Once you submit a request, it will begin the approval process which is made up of the following steps:

1. School/Service – your own School/Service will first assess the request to ensure that the appropriate information has been entered. This step is also responsible for checking/entering information for the financial details section of the request.
2. Dean/Director – your Dean/Director will assess the request. Your request will only be assigned to a monitoring meeting once your Dean/Director has approved it.
3. Job Evaluation – any requests which are for a "new post" (as opposed to a replacement) will need to go through a job evaluation check to ensure that it has previously been evaluated.
4. Finance – all requests are checked by Finance.
5. HR/VCO – the final checks are undertaken by HR and VCO. Only requests which have been approved at this stage can be progressed.