# HR Monitoring System Guidance – HR Director

This document should be used by anybody with the HR Director role for the <u>HR Monitoring System</u>. It outlines the steps you must take to approve a monitoring request.

### Key dates

The dates below identify the key dates within the system at which monitoring requests will become visible.

- Cut-off date: Monday 5pm
- Finance date: Tuesday
- HR Director date: Wednesday
- DVC date: Thursday

This means that the HR Director will only be able to view requests from the Wednesday (assuming they have been checked by Finance), and they should be checked prior to the DVC actioning them on the Thursday.

## Allocation of requests

Monitoring requests will be assigned to HR Director role once it has been checked by Finance and only from the key HR Director date (Wednesday) as mentioned in the key dates section.

### Approving requests

Users with the HR Director role will be able to see all requests which they are required to process via the "My tasks" tab.



The number represents the number of requests which are currently awaiting approval, including those which you may have already requested additional information for. Clicking on the number should show you a table similar to the following:

| Show 10 🗸 entries |                     |               |                    | Search:      |              |                              |
|-------------------|---------------------|---------------|--------------------|--------------|--------------|------------------------------|
| Monitoring ID     | Request Type 💧      | Job Title ≬   | School/Service     | Submitted By | Meeting Date | Status                       |
| <u>123456</u> Ø   | Advertise a Vacancy | Administrator | Financial Services | Alan Taylor  | 6 July 2023  | More information<br>required |
| 123457 @          | Advertise a Vacancy | Lecturer      | Applied Sciences   | Pete Johnson | 6 July 2023  | Awaiting approval            |

From here, you can click on the relevant monitoring ID to be taken into that specific monitoring request. At the bottom of the request, you should see a section similar to the below:

| School/Service Internal Approval Section               |
|--|
| Approved?<br>Yes                                       |
| Dean/Director Approval Section                         |
| Approved?<br>Yes                                       |
| Job Evaluation Section                                 |
| Approved?<br>Job evaluation - complete                 |
| Finance Section  |
| Included within base budget?       Yes   Open messages |
| HR Section   |
| Approved?<br>Select an option                          |
| Submit   |

From here you are able to click on the "Open messages" box in order to view any messages which were entered as part of a previous approval section.

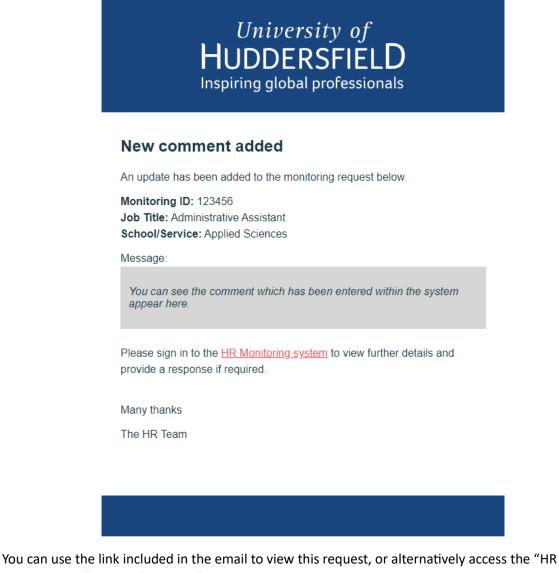
You can also select one of the following approval options:

- Yes selecting this option will progress to the DVC. Adding a comment is optional.
- No selecting this option will progress to the DVC. Adding a comment is optional.
- More information required selecting this option will email the HR Managers, advising that you have asked for additional information. When selecting this option, you must enter a comment in the "Comments" box so that the HR Managers know what information you have requested. See the "More information required stage" section of this document for additional information. Note: only HR and the DVC are able to see any comments added at this stage.
- Yes conditional selecting this option display a new "Approval Conditions" box which must be completed before it is progressed to the DVC. When setting this status you only need to complete the Approval Conditions box, and adding a comment is optional, as shown in the screenshot below. Note: only HR and the DVC are able to see the approval conditions.

|                   | HR Section                                  |   |
|-------------------|---|---|
| Approved?         | Approval Conditions                         | Comments (if applicable)  |
| Yes - conditional | Approval conditions should be<br>added here | Adding comments here is<br>optional when using the "Yes -<br>conditional" approval status |
|                   | Submit                                      |   |

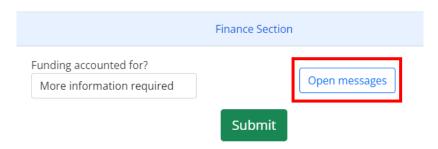
## More information required stage

Once you change the status of a request to "More information required", the HR Managers will be informed of this and asked to provide a response within the system. Once they provide a response all users with the relevant HR Director role will receive an email similar to the one below:



You can use the link included in the email to view this request, or alternatively access the "HR Director Tasks" via the "My tasks" tab to see all outstanding requests currently awaiting approval at this stage.

To review any messages which have been added as part of this section, scroll down to the bottom of the request and click on the "Open messages" box:



This will open a modal displaying all messages relating to this part of the request:

| HR Messages  | >  | × |
|--|--|---|
|  | TJ Tom Jones   |   |
|  | Is this a replacement for Steve?<br>Sent: 04-08-2023 10:30 |   |
| BW Barbara Windsor   |  |   |
| No that was a different request (123457), this<br>is a completely new post I'm requesting.<br>Sent: 04-08-2023 13:39 |  |   |
| Reply:   |  |   |
|  |  |   |
|  |  |   |
|  | Close Submit reply   |   |

You can submit a reply if you still require additional information, which will trigger another email to the HR Managers asking them to provide the additional information to you. Alternatively, you can close the modal and update the approval option to either "Yes", "No" or "Yes - conditional" and press the submit button to complete your section of this request.

|                  | HR Section    |
|------------------|---------------|
| Approved?<br>Yes | Open messages |
|                  | Submit        |