

HR Monitoring System Guidance – School/Service Internal Approvers

This document should be used by anybody with the School/Service Internal Approval role for the [HR Monitoring System](#). It outlines the steps you must take to approve a monitoring request.

New requests

Once a user submits a monitoring request assigned to your School/Service all users with this role should receive an email similar to the below:



Monitoring ID: 123456

Job Title: Administrative Assistant

A new monitoring request has been submitted for the role of Administrative Assistant.

Please sign in to the [HR Monitoring system](#) to view and action this request.

Many thanks

The HR Team



You can use the link included in the email to view this request, or alternatively access the “School/Service Tasks” via the “My tasks” tab to see all outstanding requests currently awaiting approval at this stage.

At the bottom of the request, you should see a section similar to the below:

School/Service Internal Approval Section

<p>Approved?</p> <input type="text" value="Select an option"/>	<p>Comments</p> <input style="width: 95%; height: 30px;" type="text"/>
<input type="submit" value="Submit"/>	

From here you can select one of the following approval options:

- **Yes** – selecting this option will progress the request and email all users with the “Dean/Director” role advising them that you have approved the request and it is ready for them to review.
- **No** – selecting this option will reject the request and email the submitter of the request advising that it has been rejected. You could add a comment to the “Comments” box which they are able to view when they sign in to view the reason for rejecting the request, or alternatively you may prefer to relay this reason outside of the system.
- **More information required** – selecting this option will email the submitter of the request advising that you have asked for additional information. When selecting this option, you must enter a comment in the “Comments” box so that the submitter knows what information you have requested. See the “[More information required stage](#)” section of this document for additional information.

Please note that you are unable to approve requests until the “Financial details” of the request has been completed. If this section is left blank you would first need to either ask the submitter to update this information, or update this yourself and press the “Update” button once complete.

Financial details

<p>Unit4 Vacancy ID (if known) ?</p> <input type="text" value="ZVXX123"/>	<p>Will this post be funded from an external funder? * ?</p> <input type="text" value="Select an option"/>
<p>Salary cost centre(s) * ?</p> <input type="text" value="Enter value here"/>	<p>Is this request included within your School/Service's base budget? * ?</p> <input type="text" value="Select an option"/>

Enter replacement details here (if applicable)

Employee being replaced ?	Reason for replacement ?	Leaving date ?
<input type="text" value="Enter value here"/>	<input type="text" value="Select an option"/>	<input style="border: 1px solid #ccc;" type="text" value="dd/mm/yyyy"/>

Duplicate

Update

More information required stage

Once you change the status of a request to “More information required”, the submitter will be informed of this and asked to provide a response within the system. Once they provide a response all users with the School/Service Internal Approver role will receive an email similar to the one below:



New comment added

An update has been added to the monitoring request below.

Monitoring ID: 123456

Job Title: Administrative Assistant

School/Service: Applied Sciences

Message:

You can see the comment which has been entered within the system appear here.

Please sign in to the [HR Monitoring system](#) to view further details and provide a response if required.

Many thanks

The HR Team



You can use the link included in the email to view this request, or alternatively access the “School/Service 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:

School/Service Internal Approval Section

Approved?

More information required

Open messages

Submit

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

School/Service Messages ✕

TJ Tom Jones
Is this post a replacement for Steve?
Sent: 26-07-2023 08:34

BW Barbara Windsor
No that was a different request (123457), this is a completely new post I'm requesting.
Sent: 26-07-2023 11:26

Reply:

Close Submit reply

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

School/Service Internal Approval Section

Approved?

Open messages

Submit