

Bangor University Talentlink User Guide



Guide 3: The Approval process – for Approvers

Introduction

This guide describes how to view and approve job requisitions submitted to you via Talentlink.

The process described here replaces the previous e-work approval process for internally or externally advertised posts only.

Section A: The Approval Process

Section B: Approving/Rejecting a Requisition

Section C: Alternative Approval Method – Tasks App

Section D: Forwarding an Approval Step

Section E: Tracking the Approval Status

Section F: Restarting the Approval Chain after Rejection

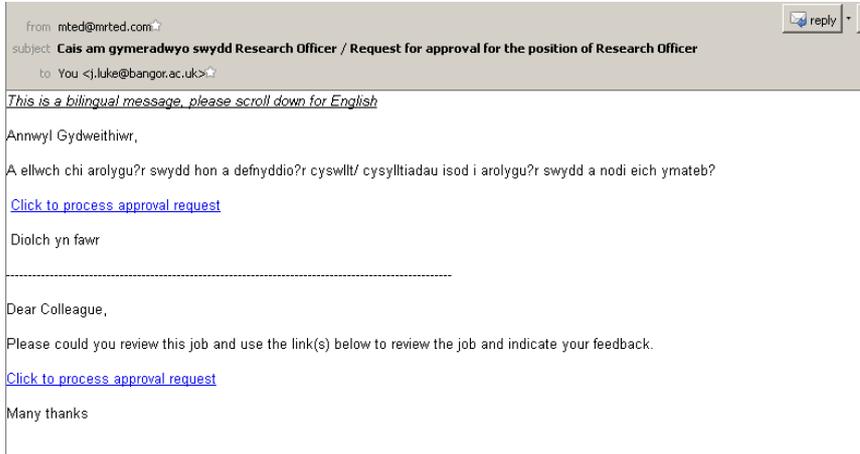
Section A: The Approval Process

- Talentlink provides a parallel approvals process. Therefore, all approvers for a job vacancy are able to view and approve/reject a requisition at the same time.
- The person raising the job requisition selects the type of funding of the post and the system applies the appropriate approval process. This person also selects the people to approve the post. However, they are guided on the types of approver to choose (e.g. HR, Planning) and the selection list is filtered to only show users from those areas.
- If the person who raises the requisition has incorrectly selected you to approve the post, **PLEASE DO NOT APPROVE**. Instead, please forward the approval step to the appropriate person (see Section D).

All members of the approval team need to approve the post before it can be advertised

Section B: Approving/Rejecting a Requisition

- The approver will receive an email informing them that they have a request for approval*



- Clicking on **Click to Process Approval Request** link will take you to view the requisition in Talentlink†

Administrative Assistant

OVERVIEW						
Job Status	Open	Organisation	Bangor University » Central Services » Canolfan Brailsford			

BUDGET & COST						
Amount	Currency	Description	Date	Cost Category	Cost Type	

ADMINISTRATIVE DATA		CONTRACT	
Job number	BU00807	Number available	1
Due Date	03/12/2014	Contract Type	Fixed Term Contract
Request Type	Wholly Departmental Funded (Central Service Depts)	This post is:	A new post
Reporting lines		Replacement Information (if applicable)	
Responsible to (Job title)	Departmental Administrator	Post Number	-
Responsible to (Job title) (Cymraeg)	Gweinyddwr Adranol	Person being replaced	-
Name of Line Manager for this post	John Jones	Recruitment from	Internal Only
Will the postholder be a line manager to anyone else?	No	Role Profile	CCO Clerical Officer (Grade 4)
Primary Location (Campus)	Bangor	Grade	4
If Other:	-	Salary Range	£18,549 - £22,029
Specify below:	-	Guide Start Date	
Contract Duration	-	Please enter start date	01/02/2015
e.g. Permanent, 12 months	Permanent	Guide End Date	
Duration in Cymraeg	Parhaol	Please enter guide end date (Fixed Term only)	-
Will the postholder be required to work abroad for periods exceeding 1 month?	No	Fixed End Date?	No
Job Category	Clerical	Full time / Part time	Full time
Salary Information		Work Hours / FTE	
Text to Appear In Advert	£18,549 - £20,781 p.a on Grade 4	Please enter number of hours or FTE	36.25
Text to appear in advert (Cymraeg)	£18,549 - £20,781 p.a ar Graddfa 4	Per	Hours per week
DBS Required	No	Funding Information	
Is this role public facing?	Yes	Planning Model /Budget /FEC Ref	-
Welsh language competency level required	W1 Essential	Primary Project Code	Y16100
Should this post be advertised on Jobs.ac.uk?	No	For Finance/Planning use only - Maximum Starting Point	-
Where else should this post be advertised?		For Finance Use - Are there any publicity requirements?	-
Publication 1	-	Administrative comments	
Publication 2	-		
Publication 3	-		

Comment

Approve | Reject

* The email notifications can be switched off in the **User Preferences**. If you have switched off email notifications, you will then need to approve/reject requisitions using the **Tasks App** (see Section C).

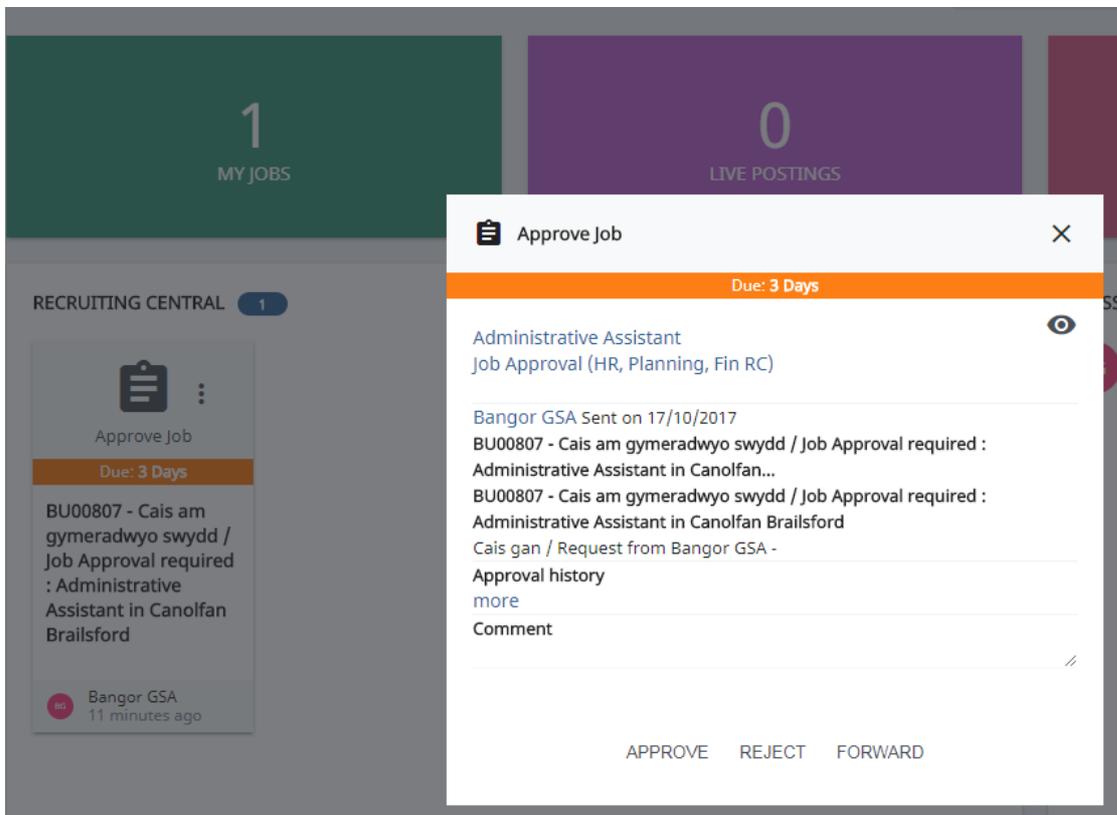
† Check that the correct approvers have been selected for the funding type. If this needs to be changed you can edit them (see Guide 4).

- Clicking **Approve** will register your approval of the post
- Clicking the **Reject** button will reject the requisition.
 - If rejecting the requisition, please note your reasons for doing this in the **Comments** field
- At this point, you may not wish to approve or reject but speak to the person who raised the requisition, agree a change and complete this change yourself (see Editing a Job Requisition, Guide 4) and then approve the requisition.
- **However**, if the change you make means that the other approvers would need to re-consider the approval of the requisition, you will need reject the requisition and then re-start the approval process (see Restarting the Approval Chain after Rejection, Section F)

Section C: Alternative Approval Method – Tasks App

Alternatively, you can approve or reject a requisition using the **Tasks App** which can be found on the **Homepage**.

- Click on a task to see it in the overlay view



- Click the Job Title (in blue) to view the details of the job. (Clicking the 2nd blue link - Job Approval - navigates to the full Job details screen.)

JOB SUMMARY

Administrative Assistant

CLOSE

PRINT

SEND VIA EMAIL

OVERVIEW

Job Status	Open	Organisation	Bangor University » ... » Canolfan Brailsford
Approval Process	Job Approval (HR, Planning, Fin RC) (Submitted)	Posting Status	-
Candidates	New: 0 / In Process 0 / Offered: 0 / Hired 0 / Closed: 0 / All 0		

ADMINISTRATIVE DATA

Job number	BU00807
Due Date	03/12/2014
Request Type	Wholly Departmental Funded (Central Service Depts)
Reporting lines	
Responsible to (Job title)	Departmental Administrator
Responsible to (Job title)	Gweinirddwr Adranol

CONTRACT

Number available	1
Contract Type	Fixed Term Contract
This post is:	A new post
Replacement Information (if applicable)	
Post Number	-
Person being replaced	-

- When you have finished checking the details, click close to return to the Tasks app
- If appropriate, enter a message in the **Comments** field
- Click **Approve**, **Reject** or **Forward**

Section D: Forwarding an Approval Step

A user can forward a step for approval to another approver. For example, when you know for sure that the original approver is on holiday, you can forward the approval step to another user or yourself, to avoid blocking the workflow of the Job vacancy. Also, if someone has made an error when selecting the approvers, you can forward the approval step to the correct approver.

- From the jobs page, on the **Job Approval Process** tab, click **Forward** to the right of the step that you want to forward to another approver.

ADMINISTRATIVE ASSISTANT

JOB CONTENT **JOB APPROVAL PROCESS** MATCHING CANDIDATES POSTING SELECTION / HIRING

HR-PLAN-FIN RC WITH EXEC VERSION 1 -- LAST VERSION

✓ Exec Approval Started on 17/10/2017 by GSA Bangor - Approved on 17/10/2017 [View History](#)

#1: GSA Bangor Approved on 17/10/2017

📌 Job Approval (HR, Planning, Fin RC) Started on 17/10/2017 by GSA Bangor [View History](#)

#1: Luke Jade Submitted on 17/10/2017

#2: Mundy (Plan) Kevin Submitted on 17/10/2017 [Approve / Reject](#)

#3: Parry (Fin-RC) Rhys Submitted on 17/10/2017 [Forward](#)



- Select the new approver and the approver to be replaced.

SUBMIT JOB APPROVAL STEP TO ANOTHER APPROVER

Job Opening Administrative Assistant

MESSAGE

Use an Email Template **Job Requisition Approval Request**

Approval Step Job Approval (HR, Planning, Fin RC)

Submit to (required) Griffith (HR) Steffan

Replacing Luke Jade

Subject [%job_number%] - Cais am gymeradwyo swydd / Job Approval required : [%job_...]

ADD MERGE FIELDS

Administrative comments

Cais gan / Request from [%sender_user_firstname%] [%sender_user_lastname%] - [%job_approval_url%]

ADD MERGE FIELDS

Receive Notification when completed Yes No

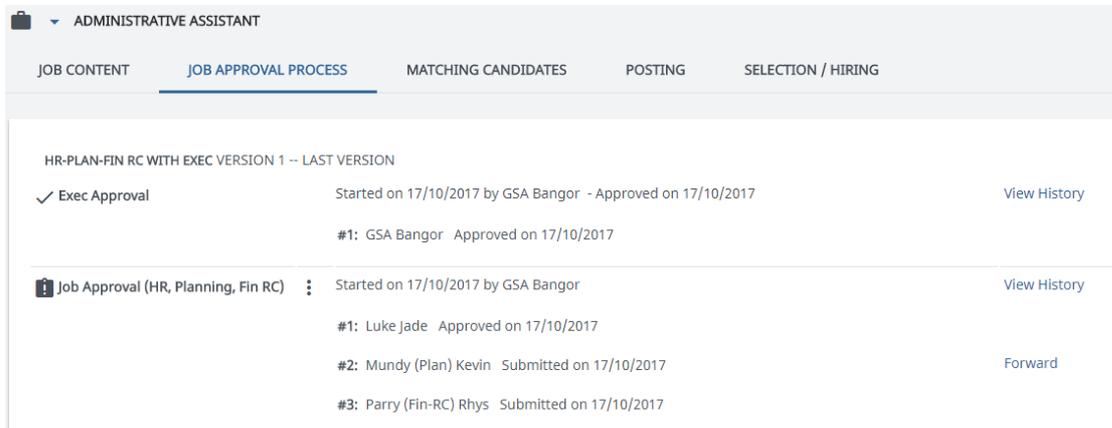
Due Date (required) (dd/mm/yyyy) 20/10/2017

CANCEL SUBMIT

- Enter/edit a message in the **Administrative Comments** field (if required)
- Click **Submit** to forward the request to another user

Section E: Tracking Approval Status

- Go to the **Job Approval Process** tab to see the approval status for each approver



The screenshot shows the 'JOB APPROVAL PROCESS' tab for 'ADMINISTRATIVE ASSISTANT'. It displays two job requisitions:

Job Requisition	Approval Status	Start Date	By	Approved On	Actions
HR-PLAN-FIN RC WITH EXEC VERSION 1 -- LAST VERSION	✓ Exec Approval	Started on 17/10/2017	GSA Bangor	Approved on 17/10/2017	View History
		#1: GSA Bangor	Approved on 17/10/2017		
Job Approval (HR, Planning, Fin RC)	ⓘ	Started on 17/10/2017	GSA Bangor		View History
		#1: Luke Jade	Approved on 17/10/2017		
		#2: Mundy (Plan) Kevin	Submitted on 17/10/2017		Forward
		#3: Parry (Fin-RC) Rhys	Submitted on 17/10/2017		

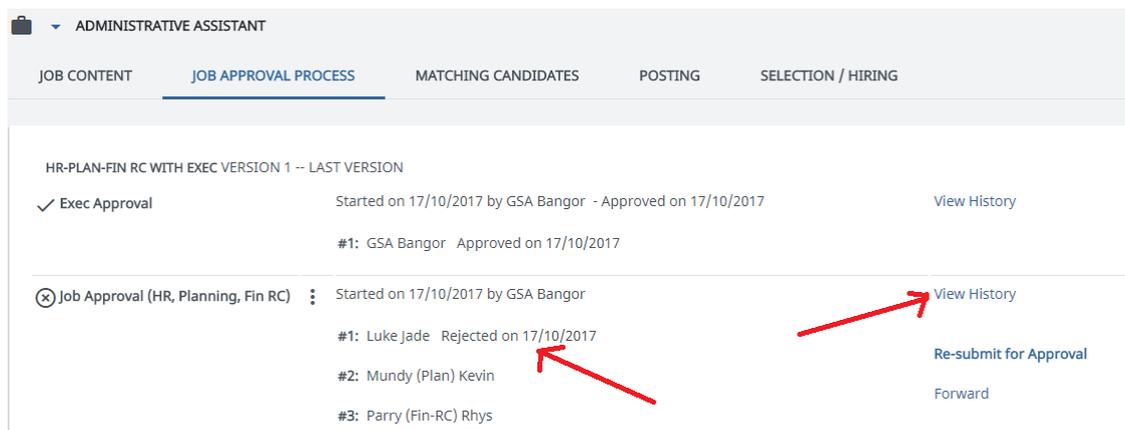
In this example, you can see that the Executive approval is complete. HR have approved the post but Planning and Finance have yet to approve or reject.

Section F: Restarting the Approval Chain after Rejection

When a job requisition is rejected this does not necessarily mean the request is finished. A rejection can be used to make changes which will affect the other approvers who have already approved the request e.g. change of Grade. In this case, after rejecting the request, the changes can be made to the job requisition and all the approvals can be reset and resubmitted. This can also be performed by the requesting department, if appropriate.

[If these changes are subtle (e.g. correcting a spelling mistake) then the request can be edited without rejecting and resubmitting.]

- On the **Job Approval Process** tab, you can see when an approval step has been rejected.



The screenshot shows the 'JOB APPROVAL PROCESS' tab for 'ADMINISTRATIVE ASSISTANT'. It displays two job requisitions, with the second one showing a rejection:

Job Requisition	Approval Status	Start Date	By	Approved On	Actions
HR-PLAN-FIN RC WITH EXEC VERSION 1 -- LAST VERSION	✓ Exec Approval	Started on 17/10/2017	GSA Bangor	Approved on 17/10/2017	View History
		#1: GSA Bangor	Approved on 17/10/2017		
Job Approval (HR, Planning, Fin RC)	⊗	Started on 17/10/2017	GSA Bangor		View History
		#1: Luke Jade	Rejected on 17/10/2017		Re-submit for Approval
		#2: Mundy (Plan) Kevin			Forward
		#3: Parry (Fin-RC) Rhys			

Red arrows in the original image point to the 'Rejected on 17/10/2017' status for Luke Jade, the 'View History' link for the rejected step, and the 'Re-submit for Approval' link.

- You can view any comments / messages from the approval process by clicking **View History**, to the right of the approval step. A new window will open

JOB APPROVAL HISTORY
Job Opening Administrative Assistant

FILTER
Approval Step Job Approval (HR, Planning) ▾

DATE ▾	APPROVAL STEP	SENDER	RECIPIENT	ACTION	ADMINISTRATIVE COMMENTS
17/10/2017	Job Approval (HR, Planning, Fin RC)	Luke Jade	Luke Jade	Rejected	From the job description, this post should be grade 8 not grade 7. Please amend the job requisition to reflect this change and re-start the approval process
17/10/2017	Job Approval (HR, Planning, Fin RC)	GSA Bangor	Parry (Fin-RC) Rhys	Submitted	BU00807 - Cais am gymeradwyo swydd / Job Approval required : Administrative Assistant in Canolfan Brailsfor

- To make the required changes, click on the Job Content tab if it is not already showing and then make sure the Job Requisition sub-item is selected. Click ▾ to display the dropdown and select **Edit Job Requisition**

ADMINISTRATIVE ASSISTANT

JOB CONTENT JOB APPROVAL PROCESS MATCHING CANDIDATES

Job Requisition ▾ Job Description Profile Budget & Cost

OVERVIEW

Job Status: Open Or

Approval Process: Job Approval (HR, Planning, Fin RC) (Rejected) Pc

Candidates: New: 0 / In Process: 0 / Offered: 0 / Hire

Archived Applications: 0

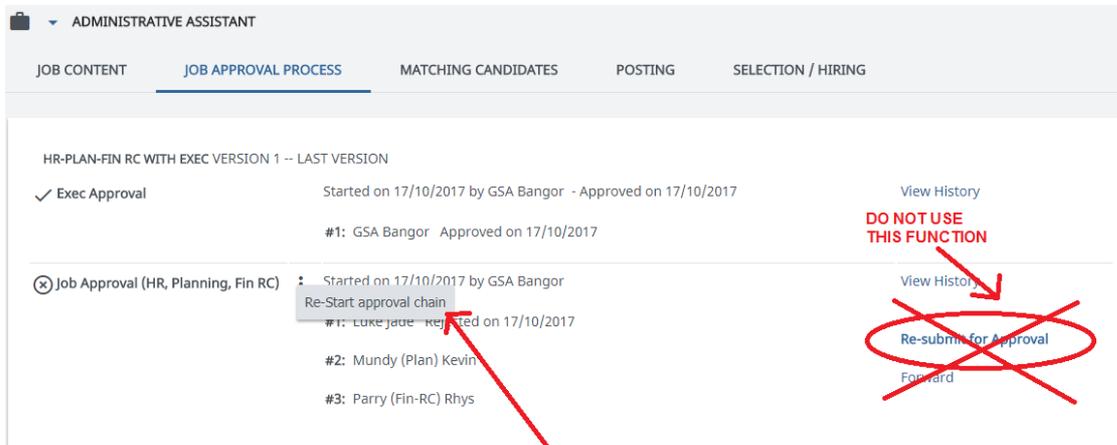
Edit Job Requisition

Edit Job Status

Edit Comments

- Make your changes on the displayed form and press **Save**

- After making the necessary changes, from the Job Approval Process tab, click  and then select **Re-Start Approval Chain***. A new window will appear



- Enter/edit the message (if required) and click **Send**

MESSAGE

Use an Email Template **Job Requisition Approval Request**

Approval Step Job Approval (HR, Planning, Fin RC)

Submit to Luke Jade
Parry (Fin-RC) Rhys
Mundy (Plan) Kevin

Subject **[%job_number%] - Cais am gymeradwyo swydd / Job Approval required : [%job_**

ADD MERGE FIELDS

Administrative comments 

Cais gan / Request from [%sender_user_firstname%] [%sender_user_lastname%] - [%job_approval_url%]

- The original approvers will receive a new task.

* The Re-submit for Approval link next to the rejection line will only send this back to you for approval. Therefore, you should not use this button