Contents

1. Accessing the approval Request
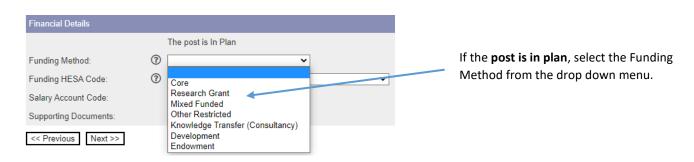
Once HR (and where applicable, Research Finance) have reviewed and approved the request, it will progress to Finance for approval.

You will receive an email like the one below:

By clicking on the link contained in the email, you will be taken straight to the progress tab of the staff request.

You will be able to see that there is an approval pending. To open up the form, click **Next.**
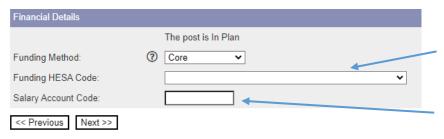
NOTE: when you click **next** the whole form will appear, and you will be able to review the details but not edit. Scroll to the bottom of the form to the Financial Details section.

2. Request is in Plan

If the **post is in plan**, select the Funding Method from the drop down menu.

2.1 Core funded

If you select **Core, Other restricted, Knowledge Transfer, Development or Endowment** as the funding method, you then need to select the Funding HESA code from the drop down box. If you're unsure, this can be changed at a later date.

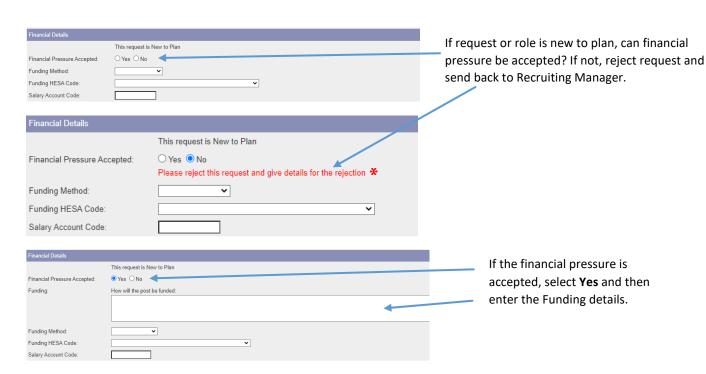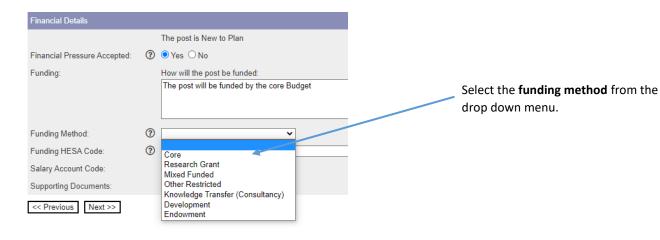Then enter the salary account code.

2.2 Research Grant

Click **Next** to progress the form.

If you select **'Research Grant' or 'Mixed Funded'** as the funding method, you then need to select the 'Research Finance manager' from the drop down menu.

Then select the Funding HESA code from the drop down options. If you're unsure, this can be changed at a later date.
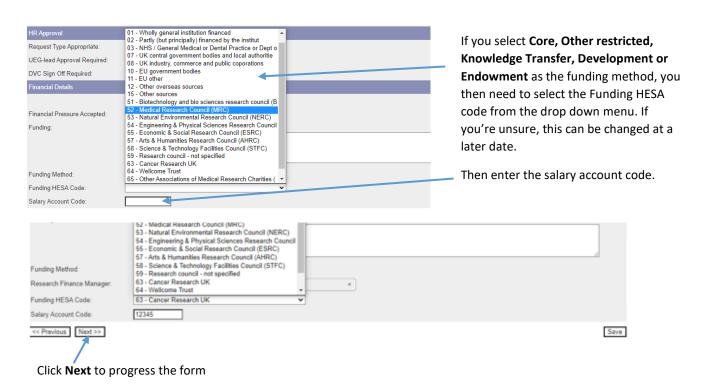
Then enter the salary account code; if this it to split across more than one code please enter 0 at this stage

3. Request is New to Plan

If request or role is new to plan, can financial pressure be accepted? If not, reject request and send back to Recruiting Manager.

If the financial pressure is accepted, select **Yes** and then enter the Funding details.

Select the **funding method** from the drop down menu.

3.1 Core Funded

If you select **Core, Other restricted, Knowledge Transfer, Development or Endowment** as the funding method, you then need to select the Funding HESA code from the drop down menu. If you're unsure, this can be changed at a later date.

Then enter the salary account code.

Click **Next** to progress the form

3.2 Research Grant

If you select **'Research Grant' or 'Mixed funded'** you will then need to enter a 'Research Finance Manager' options will appear in the drop down menu.

Select the correct **Funding HESA Code** from the drop down menu. If you're unsure, this can be changed at a later date.

Then enter the **Salary Account Code**.

Click **Next** to progress the form

4. Approval

The **Notes** section will appear. Here you can note why the form is being rejected or any other detail you would like to record.

You can approve or reject the form by clicking on the tabs at the top.

NOTE: if you reject the form it will be sent back to the Hiring Manager to review the notes and re-submit the form.

If the form is approved it will be sent on to the next stage of approval.