IFS

The new HR, Finance & Managers self-service system

Authorising Manager
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Email Alerts

- Authorising Managers will receive an email alert when there is an Employment Change awaiting authorisation.
- Authorising Managers will receive an email alerts when there are Finance Tasks awaiting action
Pending Authorisation – This is where you can see the HR changes that require your approval

These counters highlight the status of HR changes that you have submitted for your direct reports.
## Searching for a colleague

**My Colleagues**

- **All Colleagues**: This will bring up the records for all direct reports.
- **Colleague Search**: You can use this search to access records for colleagues who fall below you the hierarchy.

## Authorisation Route for Employment Changes

1. **Manager submits employment change**
2. **Managers line manager receives email alert**
3. **Managers line Manager approves/rejects change**
   - **If Rejected change returns to the manager for action**
4. **If approved, change goes to HR Administration**
5. **Administrator reviews change & supporting docs**
6. **Administrator Executes/Rejects Changes**
   - **If Rejected, the change returns to the manager for action**

## Two Types of Rejection

<table>
<thead>
<tr>
<th>Rejection Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reject and allow edit</td>
<td>Authorising Manager rejects the current change but requires manager to edit and resubmit the change. This will be sent back to the manager.</td>
</tr>
<tr>
<td>Reject Outright</td>
<td>Authorising Manager rejects the change and no further action can be taken.</td>
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</tbody>
</table>
Approving an Employment Change

Authorising Managers will receive an email when they have a change awaiting approval

1. On your HR Start Page > Click the appropriate links under Pending Authorisation for Employment Change, Temporary Extension, Secondment Amendment

   This will open the list view of those types of change awaiting approval.

   1. Right Click on the line of data > Select Employment Data Change or Temporary Contract Extension or Secondment Extension to view the change in full.

   2. Check all the data is correct and agreed.

   3. Right Click in the Header > Select Approve

   This will be sent to HR Admin to execute to make live on the system

It is important that you check the details of the change. Your checks may include:

| Salary | Submitted in hourly rate  
A reason for the change has been added to the comments box  
The salary is in line with your benchmarking, pay bandings and is legally compliant |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Position</td>
<td>Is correct and agreed</td>
</tr>
<tr>
<td>Valid From/Valid To</td>
<td>Are agreed and Sunday dates have been selected</td>
</tr>
<tr>
<td>Assignment</td>
<td>Matches the reason for the change</td>
</tr>
<tr>
<td>Temporary Contract Changes</td>
<td>Sunday date has been selected</td>
</tr>
<tr>
<td>Secondment Changes</td>
<td>The Secondment has not yet begun, and Sunday dates have been selected</td>
</tr>
</tbody>
</table>
Useful Screens for Approving a change

Click on the appropriate Pending Authorisation Link (the counters will display the number of changes awaiting your approval)

Right Click on the line of the change > Select Employment Data Change… Temporary Contact Extension… or Secondment Extension…

View the full change > Right Click in the Header > Select Approve

Rejecting an Employment Change

1. Right Click in the Header > Select Reject Approval
   The Rejection Box will appear. You have two options: Reject and allow edit (it will be sent back to the manager to amend and resubmit.) Reject without edit (you don’t approve the change and it cannot be resubmitted)

Reject and allow edit

2. Complete the box:
   a. Click into the rejection code field > Click List > Select either Not Budgeted/Not Authorised
   b. Click Allow Edit
   c. Enter the Reason for editing
   d. Click OK
Reject and do not allow edit

3. Complete the box:
   a. Click into the rejection code field > Click List > Select either Not Budgeted/Not Authorised
   Do not tick the allow edit box.
   b. Click OK
   c. Add the reason for rejecting the change
Advanced Search by Organisation Code

As an authorising manager you may wish to search by organisation code, to view all colleague records for a particular team. This is also useful if you are unsure of the full colleague name but know their location.

1. On your HR Start Page > Click Colleague Search

*The Search box will display*

2. In the **Organisation Code** Field > Enter the Organisation Code

   **TOP TIP:** Remember the cost centres (org codes) have changed

3. Click **Search**

*The first colleague record will display*

4. Navigate through the rest using the drop down, located at the top of the page
Search for the Performance Reviews conducted by your direct reports

As an authorising manager you may wish to review Colleague Performance reviews being conducted by your direct reports

1. From you HR Start Page > Click on

2. Use the drop down in the blue title strip to select your direct report

The performance reviews completed, overdue and pending for this manager will display.
Approve personal expense claim sheet

Authorising managers are required to approve personal expenses in IFS so that colleagues are reimbursed as quickly as possible.

1. From the Managers Start page select Finance Start Page

2. Select Expenses Need Authorisation

This will open the list view all expenses needing your authorisation

3. Right Click on the line of the particular expense sheet that needs approving for payment.

4. Select Expense Sheet from the menu.

This will take you to the expense sheet. From here you can see the detail of the expenses being claimed. Check the details of the claim by navigating through the tabs

5. Open the Attachments Tab at the footer > Double Click the attached files to view the receipts and check the receipts cover the claim.

6. To approve > Right Click in the Header > Select Approve
Rejecting personal expense claim sheet

There can be various reasons to reject an expense sheet, such as incorrect figures or copies of receipts not being attached to the expense form.

1. Right Click in the Header > Select Remove Confirmation this will put the expense sheet back into the state of ‘Preliminary’ for the colleague so that the required changes can be made.

At this stage the colleague does not know you have not approved this expense sheet so you need to let them know.

2. Right Click in the Header > Select Send to from the menu > Select Mail Recipient as Link.

This will open a new message in your Outlook, with a link to the expense sheet.

3. Enter a comment about why the expense has been rejected  > Send the email to the correct colleague.
Authorise an Invoice

1. From the Finance Start Page > Select Inv Needing Authorisation

Remember the counters will show you how many invoices you have waiting for action.

The Table view of invoices will display

2. Select the invoice you wish to view > Right Click and Select Posting Proposal

This will display the full invoice screen. The upper area will display the overall value of the invoice; the lower part shows the account and branch for posting the invoice

3. Click on Attachments in the footer and double click the document icon to view the invoice

4. Click on the Authorise Tab

5. Find yourself in the list of authorisers > Right Click > Select Authorise

This will notify the next authoriser, or if you are the last this will be ready pay on the next payment run. The status will change in the Authorisation Status to Authorised.
Cancel Authorisation

If you have just authorised the invoice by accident and you can cancel this option
1. Select the line > Right Click > Select **Cancel**

Wrong Authoriser

If you think you should not be authorising the invoice.

1. Right Click on your name in the list of authorisers > Select **Wrong Authorizer**. *Accounts Payable will investigate this further when this status has been selected.*

2. Right Click in the Header > Select **Send To….Mail Recipient as a Link**
   *This will create an email message in Outlook*

3. **Add an informative message** and send to:
   *ifsinvoicequeries@midcounties.coop* and send email.

Right Click on your name > Select **Wrong Authorizer**

Right Click in the Header > Send To Mail Recipient as Link
Setting substitute invoice authoriser

You may need to set a colleague to take responsibility for authorising invoice from your area for a temporary period. For example whilst you are on holiday or on secondment.

1. Navigate to the Finance Start Page > Select Set Invoice Authorisation

Substitute

This will open the Substitutes window.

2. Click on the white cross

This will add a line to create a substitute.

3. Click into the Substitute ID box > click list of values

4. Select the appropriate substitute, so they are highlighted

A substitute will adopt the approval limits for the colleague they are substituting.

5. Click OK

6. Double click in the Valid from and Valid Until dates and select the date range the substitute will be adopting your authorisation.

7. Click Save