

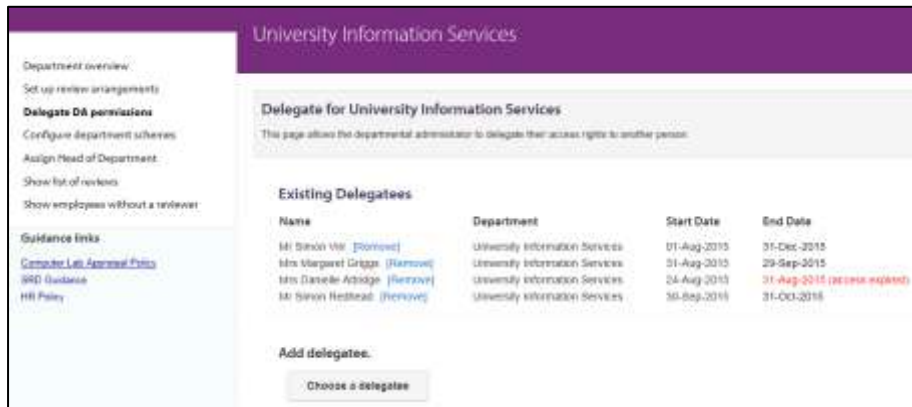
This page provides additional information common tasks in the Department Administration tab in the SRD System. The guide is divided into questions. Use **Ctrl+Click** to navigate to the advice you need:

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How do I give a colleague permanent Departmental Administration rights for my Department?

A Quick Reference Guide for Department Administrators can be found on the [HR Systems SRD page](#).

You can use the 'Delegate DA permissions' option on the DA tab to add both temporary and permanent delegates:



University Information Services

Department overview:
 Set up review arrangements
Delegate DA permissions
 Configure department schemes
 Assign Head of Department
 Show list of reviews
 Show employees without a reviewer

Guidance links:
[Computer Lab Approval Process](#)
[SRD Guidance](#)
[HR Policy](#)

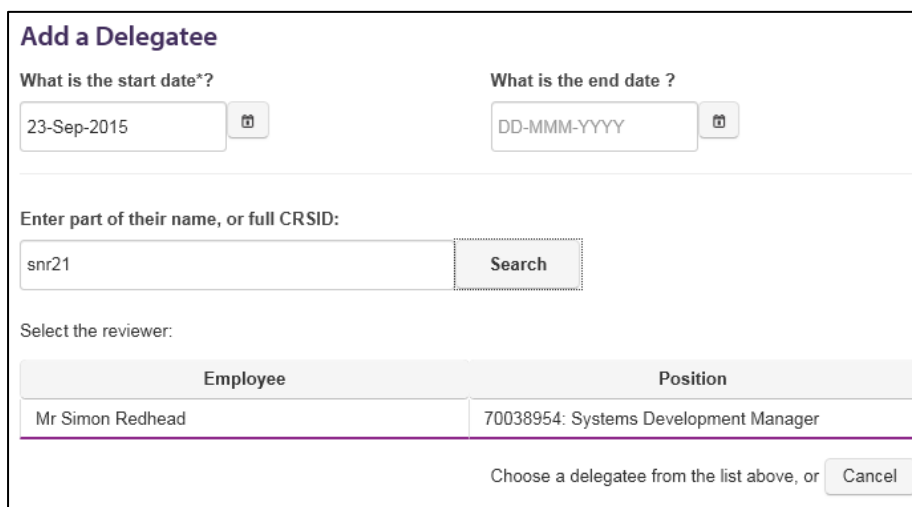
Delegate for University Information Services
 This page allows the departmental administrator to delegate their access rights to another person.

Existing Delegates

| Name | Department | Start Date | End Date |
|---|---------------------------------|-------------|--------------------------------|
| Mr Simon Vile [Remove] | University Information Services | 01-Aug-2015 | 31-Dec-2015 |
| Mrs Margaret Griggs [Remove] | University Information Services | 01-Aug-2015 | 29-Sep-2015 |
| Mrs Danielle Abridge [Remove] | University Information Services | 24-Aug-2015 | 31-Aug-2015 (permanent) |
| Mr Simon Redhead [Remove] | University Information Services | 30-Sep-2015 | 31-Oct-2016 |

Add delegate.

Click on 'Chose a delegate' and add details of the start date and CRSid or name:



Add a Delegatee

What is the start date*?


What is the end date ?


Enter part of their name, or full CRSID:

Select the reviewer:

| Employee | Position |
|------------------|---------------------------------------|
| Mr Simon Redhead | 70038954: Systems Development Manager |

Choose a delegatee from the list above, or

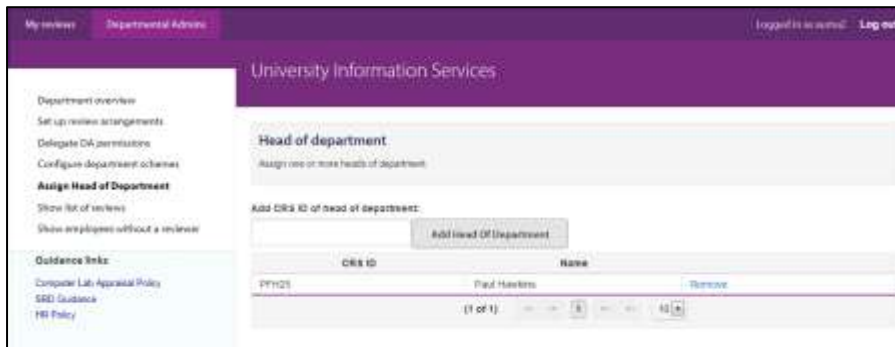
 **Please note:** that to make the delegation permanent you can leave the end date blank.

 **Please note:** Facilities so that individuals can be nominated as delegates for only a sub set of the employees in the department are not available at present.

How do I set up access for my Head of Department so that they can logon to the system to see reviews?

A Quick Reference Guide for Department Administrators can be found on the [HR Systems SRD page](#).

You can use the ‘Assign Head of Department’ option on the DA tab to add Head of Department details:

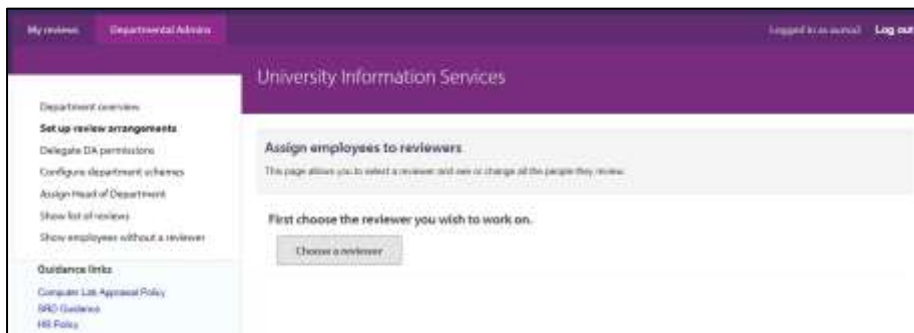


Enter the Head of Department’s CRSid then click on the ‘Add Head of Department’. The name of the Head of Department will be shown in the list box underneath.

How do I set-up review arrangements for the employees in my Department?

A Quick Reference Guide for Department Administrators can be found on the [HR Systems SRD page](#).

You can use the ‘Set up review arrangements’ option on the DA tab to do this:



Click on ‘Chose a reviewer’. Add details of the CRSid or name and click on the ‘Search’ button:

Choose a reviewer

Enter part of the reviewer's name, or their full CRSID:

Search results will appear here.

Choose a reviewer from the list above, or

Click on the name of the reviewer you wish to select:

Choose a reviewer

Enter part of the reviewer's name, or their full CRSID:

snr21

Select the reviewer:

| Employee | Position |
|------------------|---------------------------------------|
| Mr Simon Redhead | 70038954: Systems Development Manager |

Choose a reviewer from the list above, or

A list of existing employees for the reviewer is displayed. Click on **'Add an employee'**:

Assign employees to reviewers

This page allows you to select a reviewer and see or change all the people they review.

Assigning employees for **Mr Simon Redhead** [Search for a different reviewer](#)

Now you can view, change or add employees.

People who are already reviewed by Mr Simon Redhead are listed below.

People currently reviewed by **Mr Simon Redhead** in University Information Services

| | | |
|---|------------------------------|---|
| Mr Sinan Ali 70024442: Systems Developer (Technical Specialist 2) U10068: University Information Services | Review in progress | <input type="button" value=">>>>"/> |
| Mr James Reynolds 70018907: Senior Analyst U10068: University Information Services | Next Review Due: 18-Sep-2015 | |
| Mr Stuart Band 70023405: System Developer (Technical Specialist 2) U10068: University Information Services | Review in progress | <input type="button" value=">>>>"/> |



Please note: that you can also transfer employees to a different reviewer from this screen.

Enter the CRSid for the employee and click on **'Search'**:

Choose an employee to be reviewed

Enter part of the employee's name, or their full CRSID:

reynolds

Select the employee:

| Employee | Position |
|---|--------------------------|
| Mr James Reynolds (Currently reviewed by Mr Simon Redhead) | 70018907: Senior Analyst |

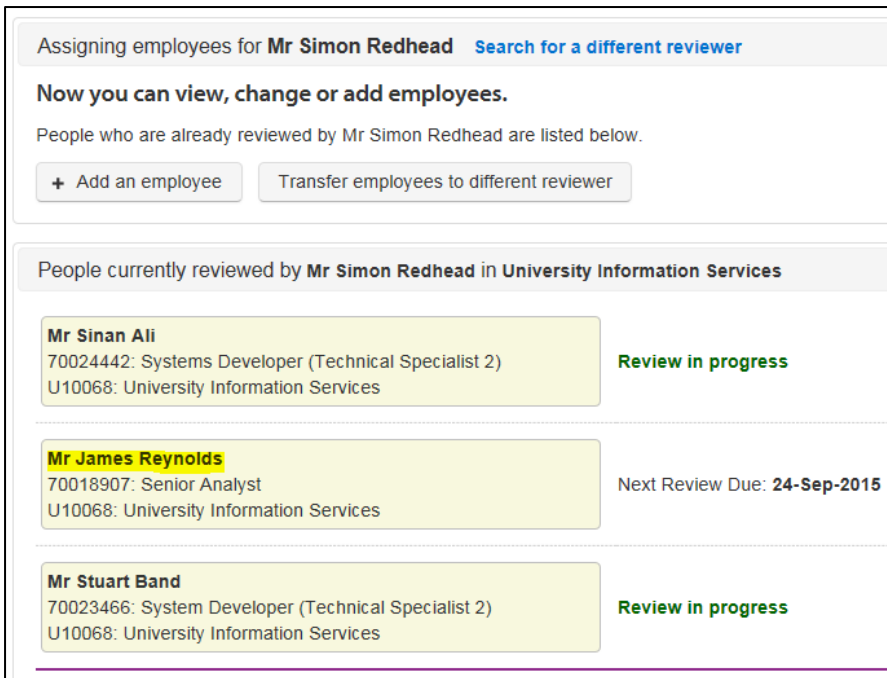
Choose an employee from the list above, or

Click on the name of the employee you wish to assign and enter a review due date:



What do the reviewer and reviewee receive when I set-up a review arrangement?

Once you have completed the review arrangement the reviewee will become visible on the reviewer's list:



The reviewee will also see the review arrangement on the 'My reviews' tab:





Please note: that both parties will also be sent an email informing them of the new review arrangement. An email reminder will also be sent to both parties one month prior to the review due date.

What happens if there is no email address for a reviewer/employee?

The SRD application relies on email for its notification process. Therefore all of your reviewers and employees need to have valid University (or, for clinical staff, NHS) email addresses set up in CHRIS before they are assigned to a review arrangement. If an email address is missing the system will display a warning:

| | |
|---|-------------------------|
| Mrs Margaret | : Common Room Assistant |
|  User has no email address configured* | |

Individuals can update or add email addresses using the Employee Self-Service (ESS) application. More information about ESS can be found on the [HR pages](#).



Please note: that if you chose to continue with the review arrangement regardless of the warning message, emails will not be delivered so you should make arrangements separately to remind the employee of due dates and, if they have no access to a computer, arrange to sign-off the review record on their behalf.

How do I sign off the review record if an employee or reviewer does not have access to a computer?

The Departmental Administrator should only sign-off a review record on behalf of an employee or reviewer if:

- The individual does not have access to a computer; and
- You have seen a paper copy of the signed-off review form.



Please note: that all notifications for pending reviews are via email so you may need to make a manual note of when the next one is due so that you can inform the reviewer or employee.

Can we load historical review records from our local database/ spreadsheet?

If you can provide a spreadsheet in a standard format, then that can be used for importing SRD data from existing departmental review systems and spreadsheets. This is only possible if all of the mandatory data can be supplied for each review to be imported.

You will need to be able to supply a minimum of the:

- employee's Person Reference Number;
- employee's Position Ref;
- review Type;
- review Date;
- Next review Date; and

- reviewer Person Reference Number.

An example spreadsheet can be found on the [HR Systems Pages for SRD](#).

If you are able to supply details of historical review in this format then please email it to the [HR Systems Service Desk](#) and they will validate the content and import the review history for you. The HR Systems Service Desk can also extract review history from CHRIS for import (see section below).



Please note: that importing review history will automatically set up a review arrangement for each employee/ reviewer pairing so you will not need to do this manually:



Please note: that when history is imported then the system will look at the next review date and will automatically generate reminder emails for any reviews due within the next month. If you have many pending reviews you may want to inform your department to expect this.

Why is the information we entered into the CHRIS Review screen not visible in SRD?

The data entered into CHRIS can only be used in SRD if the record is complete and contains a minimum of:

- employee's Person Reference Number;
- employee's Posn Ref;
- review Type;
- review Date;
- Next review Date; and
- reviewer Person Reference Number.

To find out whether the data held in CHRIS for your department is suitable please contact the [HR Systems Service Desk](#) and they will be able to advise and do an extract and import if the data is suitable.



Please note: that importing review history will automatically set up a review arrangement for each employee/ reviewer pairing so you will not need to do this manually:



Please note: that when history is imported then the system will look at the next review date and will automatically generate reminder emails for any reviews due within the next month. If you have many pending reviews you may want to inform your department to expect this.

Can the SRD system handle other types of review?

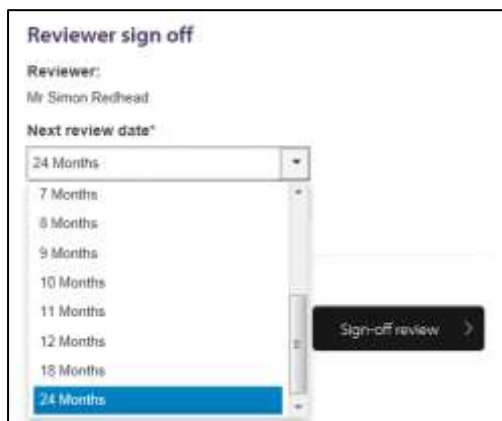
Currently the types of review that can be recorded are limited to SRD review and probationary reviews. Other kinds of review are not listed as an option and the specific facilities in the application only reflect the requirements of the Staff review and Development and probationary policies.



Please note: if there is substantial demand, then in future releases we will consider offering the ability to record other review types but these are not included at present.

How is the next review date calculated?

The due date of the review (rather than the date the review actually took place) is used as the base date for the calculation. The normal review cycle is due date plus two years. This can be overridden with an alternative time period when the review record is signed off by the reviewer:



Please note: that in future releases we will consider offering the facility to allow configuration of the review period by department but this is not available at present.

Who can see a review record?

Access to the detailed review record is restricted to the employee, the reviewer and the Departmental Administrator/ Head of Department (or their delegates).

The Central HR and HR School Teams will also receive regular statistical reports of total figures for each area.

Will the CHRIS Review module still be available to use?

Institutions can choose whether or not to adopt the new Staff review and Development System. For institutions that are not using the new system, review information can still be entered on the CHRIS Review screen and the CHRIS monthly burst reporting will still appear. However, the new application has many advantages over the CHRIS Review screen:

- Emails are sent to both review participants one month before a review is due;
- Both the employee and the reviewer can start the review recording process;
- Documents can be uploaded and stored in the application reducing local filing; and
- Training requirements entered will automatically appear on the monthly Departmental reporting.

Do I still need to record successful completion of probation in CHRIS?

At present, there is no integration with CHRIS when the final probationary review is completed successfully (or probation is extended). These details will therefore still need to be updated in CHRIS directly.

What happens when an employee or reviewer leaves?

When an employee is made a leaver in CHRIS their reviews are removed automatically from their reviewers list. It is therefore important that any in-progress reviews for leavers are signed off by the leaver (or the Departmental Administrator on their behalf) before they leave so that the review is no longer listed as outstanding on the monthly departmental burst reporting.

When a reviewer leaves the Departmental Administrator can transfer all the employees they review across to their new reviewer at once. All staff will be transferred but if only part of the team is moving to the new reviewer the individuals who are not can be edited separately.

What happens when a Departmental Administrator leaves?

When the Departmental Administrator for the institution is updated in CHRIS, the SRD system will become aware of this change and will automatically update the Department Administration roles for your department or Institution.

If you are aware in advance of a staffing change then you can set up an alternate record for the Department Administrator role in advance (see above instructions).

In an emergency, you can also contact the [HR Systems Service Desk](#) have access to revise the Departmental Administrators for any Department.

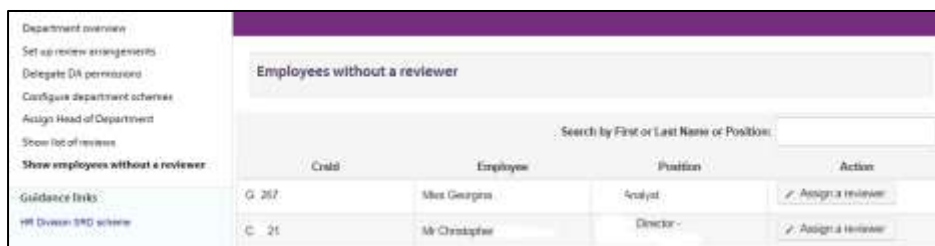
How do I configure a review arrangement for a new starter?

You must set up an initial review arrangement for the new starter.



Please note: that the system will not automatically prompt you to do this when a new starter is entered onto CHRIS. You should ensure that you routinely add review arrangements for new starters onto the system.

On the DA tab within the system you can see those employees who do not have a review arrangement. When a new starter is entered onto CHRIS they will appear automatically in this list:



| Child | Employee | Position | Action |
|-------|----------------|----------|-----------------------------------|
| G 207 | Miss Georgina | Analyst | Assign a reviewer |
| C 21 | Mr Christopher | Director | Assign a reviewer |

Click on 'Assign a reviewer' and enter the reviewer's details:

Choose a reviewer

Enter part of the reviewer's name, or their full CRSID:

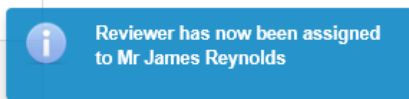
Select the reviewer:

| Employee | Position |
|------------------|---------------------------------------|
| Mr Simon Redhead | 70038954: Systems Development Manager |

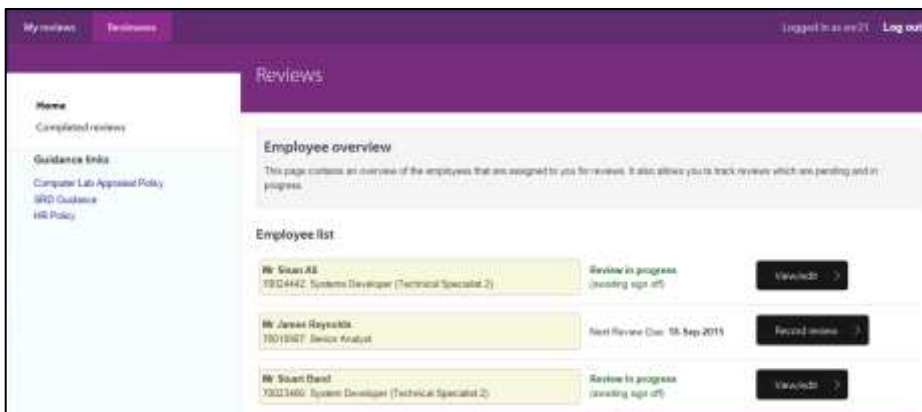
Choose a reviewer from the list above, or

Click on the reviewer's name to select them enter the date for the next review.

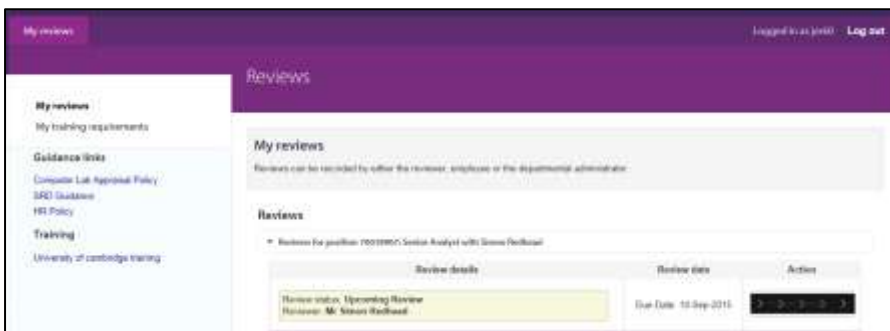
The system will display a message to confirm the arrangement:



The new starter will then appear on their reviewers list (and an email will be sent to both parties):



Once the new starter receives their Raven credentials they can login and will see their review details on the My reviews tab:



What browsers can I use?

The following browsers are supported by the SRD application:

| Application | Windows | | | MAC | | |
|---|-------------------|---------|--------|---------|--------|---------------------|
| | Internet Explorer | Firefox | Chrome | Firefox | Chrome | Safari ¹ |
| Staff review and Development application | V9+ | V36+ | V41+ | V36+ | V41+ | 7+ |

Note: that Front Motion Firefox is not supported although it is part of the standard installed desktop in some areas. If you are using Front Motion please contact your local IT support to arrange for an upgrade to a fully maintained version of the Firefox browser.

If you have any issues with the format or display of the application on these browsers then please contact the [HR Systems Service Desk](#).

When does the SRD application delete review records?

The SRD data will be stored and used in accordance with University's policy on [the use and storage of HR Data](#).

What SRD reporting is available to Departments?

From 1st November 2015, on the first of each month, a burst report will be sent by HR Analytics to each department or Institution using the new SRD application. The report will include details of:

- All overdue reviews (since the department went live with SRD);
- All reviews completed last month for the department; and
- All reviews due within the next month.

This will be sent to the current list of burst report recipients for your department.

A training summary report will also be burst monthly to the same audience. This report focusses on all training requirements entered on review records completed during the last month. It is intended for use by the Head of Department or the Departmental Administrator in planning and budgeting for the department's training needs.

¹ Note that testing was performed on 8.0.5