

Approvals Process (assigning a RA to someone and also final approval)

The benefits of using this function include:

1. Assure will automatically email the person you assign the risk assessment (RA) to and this email contains a direct link to your risk assessment on Assure. Note: you can assign the RA to multiple people (see below); and

The screenshot shows the 'Approval' page for a risk assessment with reference number 3668. The record is currently 'In Progress'. A table below shows the stages: 'In Progress' (31/03/2023, Joshua Davies) and 'Assigned (Current)' (13/04/2023, Joshua Davies assigned to Laura Davies). A menu on the right side of the table is open, showing 'Assign' and 'Detail' options, with 'Assign' circled in red.

Stage	Date	By	Assigned	Submission Due Date	Approver	Approved?	Comments
In Progress	31/03/2023	Joshua Davies				No	
Assigned (Current)	13/04/2023	Joshua Davies	Laura Davies			No	Please view RA

2. The Line Manager who has overall responsibility for the activity can use the final approval function to indicate the RA is complete and to their satisfaction.

1. Assigning the RA to someone in STFC

Step 1: Click on the approvals function at the bottom of the page, as indicated by arrow below.

The screenshot shows the bottom of the page with a toolbar containing icons for 'Save', 'Cancel', 'Expand', and several other functions. A red arrow points to a cog icon (settings) which is circled in red.

Step 2: Click on the cog on the right hand side of the first row and then click on 'Assign'.

The screenshot shows the 'Approval' page with the record now 'Unassigned'. A red arrow labeled '1' points to the cog icon in the first row of the table. A second red arrow labeled '2' points to the 'Assign' option in the menu that appears after clicking the cog.

Step 3: Click on the cog to the right of the field 'Assigned'. Add the name of the person you want to read the RA. Put any instructions in the comments box indicated with a '2', e.g. "please read and provide comments". The automatic email will contain your comments. Note: should you wish to do so you can set a due date for record to be submitted, tick box indicated.

Step 4: The person you assigned the email to will receive an email similar to the one below. They can click on the link (indicated by arrow) and it will take them to the RA.

A record in the Activity Risk Assessment (STFC) module of Evotix Assure with reference 3668 has been assigned to you for submission by Joshua Davies.
 Submission Due Date: Due date not set.
 Assigned To You By: Joshua Davies
 On: 13/04/2023
 Comments:



<https://uk.sheassure.net/ukri/Approval/Index/15470125>

When the person clicks on the link in the email it will take them directly to the Approvals page and they will see who has assigned the RA to them, similar to the image below.

Assigned	13/04/2023	Joshua Davies	Laura Davies		No	Please view RA	
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This person can assign the RA to someone else or, if they are the line manager, they can finally approve the RA. See below...

2. Finally approving the RA (usually the line manager)

Click on the 'Submit' button as indicated by the arrow below.

This will bring up a page where you can choose the name of the final approver using the cog button circled. The comments box can be used to add any instructions. Then click on 'Save and Close'. An automatic email will now be sent to this person with a link to the RA.

Once the person's name appears in the Approver column (indicated below) they will be able to click the 'Approve' button.

The screenshot shows the 'Approval' interface. At the top, there are fields for Reference (3668), Department/Division (Safety Health and Environment), Assessment date (22/03/2023), Assessor name, and Assessment title (Test Risk Assessment). Below these are 'Related' items and 'Review Date' (28/04/2023). A table at the bottom shows the current state of the approval process:

Stage	Date	By	Assigned	Submission Due Date	Approver	Approved?	Comments
Assigned	13/04/2023	Joshua Davies	Joshua Davies	31/03/2023		No	
Submitted (Current)	13/04/2023	Joshua Davies			Joshua Davies	No	Test record for subm

The screenshot shows the 'Approve Record' form. It includes a 'Date' field with the value '13/04/2023' and a 'Comments' field with the text 'RA given final approval'. At the bottom, there are buttons for 'Save and Close', 'Cancel', and 'Expand'.

The next box contains a 'comments' box that can be used for indicating that the RA has received final approval. Then click on 'Save and Close'

The Approval page will have a green box to indicate that final approval has been completed.

Submitted	13/04/2023	Joshua Davies			Joshua Davies	No	Test record for subm
Approved (Current)	13/04/2023	Joshua Davies			Joshua Davies	Yes	RA given final appro

PLEASE NOTE: If the RA is allocated to someone for final approval (using 'Submit' button), the RA will be blocked for access by others until the final approval has been completed (using the 'Approve' button).