Many transactions generated by employees in Themis Staff Self Service require approval by a staff member within the HR hierarchy with the appropriate level of authority. In most cases this will be the direct supervisor, however in some situations a staff member with Level 2 delegation, such as a Head of Department, may be required to approve a transaction.

What to consider when approving transactions

Before approving a transaction, you should ensure that you have taken the appropriate considerations into account. **Important:** refer to the Policy Library for detailed information regarding the University’s HR policies and procedures: [http://hr.unimelb.edu.au/about/policies](http://hr.unimelb.edu.au/about/policies).

Some recommended considerations are outlined below:

- **Is the information correct?** Responsibility for quality control rests with the person approving the transaction, as they are best placed to confirm the accuracy of data submitted.

- **Does the request meet policy requirements?** Always refer to appropriate policy guidelines when considering a transaction and seek assistance if you require further information or clarification.

- **Has appropriate supporting documentation been provided?** The staff member may need to provide supporting documentation to validate the transaction (such as medical certificates for sick leave, etc).

- **Have broader departmental requirements been taken into account?** In many cases it is important that the transaction is considered in the broader context of activities occurring within the work unit or department (e.g.: requests for non-urgent leave during periods of peak activity or low staffing capacity).

- **Have I ensured that my decision-making processes are transparent?** You must be able to justify the reasons for your decisions.

- **Would approval of this transaction involve a conflict of interest?** You should avoid situations involving potential conflict between the interests of the University and your own personal interests or those of your family and friends.

How is the approval process managed in Themis?

When a staff member submits a request via Themis Self Service, an email is automatically generated to advise the supervisor that a Themis transaction is awaiting their approval. If you have multiple transactions awaiting your approval, you will receive the notifications in a single email. **Note:** Themis email notifications are generated in an overnight process and sent to the supervisor on the following day. Depending on the preferences you have set, the email notification will either allow you to select a response to the transaction (i.e.: approve, reject, return for correction or forward) in the email itself, or will require you to log in to your Themis account to review and action the notification.

Timeout of notifications

To ensure you receive and are able to action a transaction notification within the required timeframe we strongly recommend that you sort your email listing by Date Sent (rather than an alternative field such as Subject or Sender). This will enable you to view and action all notifications as they are received.

Many self service requests require you to action them within 7 days. If a request notification is not actioned within this 7-day period it will time out and progress to the next level of supervision (i.e.: the person to whom you report) for action.

If the escalated request is not actioned within a further 7 days, the request will time out again and return to the staff member who initiated it with a status of Rejected. They will then have to resubmit the request (see diagram below for process).

If you will be unable to access/action your worklist for a period of time, you should use the Vacation Rules function to delegate your notifications to a suitable staff member for action. Refer to the Setting Vacation Rules section on page 2 for further details.
Setting vacancy rules

The Vacation Rules function in Themis allows you to handle your Themis notifications automatically when you are not available to manage them yourself (e.g.: when you are on leave, attending a conference, away on University business, etc). You may set a vacation rule to apply the same action to all your notifications, or you can specify individual actions for different types of notifications.

Important: when you delegate a notification you will still be accountable for the decision made.

For further details refer to the Setting your vacation rules reference card:

Approving transactions in the personal home page

Your Personal Homepage (PHP) Worklist provides you with a direct link to any documents awaiting your approval (you will also receive an overnight email notification alerting you to awaiting documents).

The Worklist preview pane will display up to 25 notifications at one time. To view additional notifications click on the Next 25 link located at the top (and bottom) of the Worklist preview pane.

Click on the Full List button to view further details or to specify the notifications displayed (e.g.: closed notifications, FYI notifications, all notifications, etc).
Viewing notification details

To view further details or action the notification, click on the **Subject** link of the notification you would like to view/action. The Notification Detail screen will display. This screen provides additional information (such as notes/comments and approval history), and enables you to action the notification.

Actioning a notification

You will receive an overnight email notification that a document requires your approval. **Note:** you do not have to wait for the email in order to action a notification.

Once you have received a notification you will need to action it (Approve or Reject, etc). **Important:** some notifications will be automatically forwarded/reassigned if you do not action them within the required period of time (e.g.: requests for leave of absence will be automatically reassigned to your 1-up supervisor if you do not action them within 7 days).

**Approving notifications**

1. Click on the required notification to open the Notification Details screen.
2. Enter any comments to the staff member submitting the application in the Note field, if desired.
3. Click on the **Approve** button.

**Rejecting notifications**

1. Click on the required notification to open the Notification Details screen.
2. Enter a reason or comments for non-approval, in the Note field.
3. Click on the **Reject** button.

For further information refer to the *Understanding your Themis worklist and notifications* reference card.
Getting help

The Themis website provides written support in a variety of formats. Please visit the Manage my staff records support page for the following documents:

- Reference cards (step-by-step instructions for specific tasks)
- Information sheets (overview of specific module, function or responsibility)
- Trouble-shooting and Frequently Asked Questions

Themis Service Desk

The Themis Service Desk team provides technical assistance from 9am to 5pm, Monday to Friday. You may lodge Themis queries:

- Online: https://bsm.app.unimelb.edu.au/
- By phone: 8344 9500

Further Information

Setting your Themis email notification preferences reference card
Using your Personal Home Page worklist reference card
Understanding your Themis worklist and notifications reference card