

Forwarding Approval Requests - Approver Oleeo User Guide

This document will provide you with step-by-step guidance on how to forward approval requests automatically, to a Nominated Approver, *in advance* of any absence.

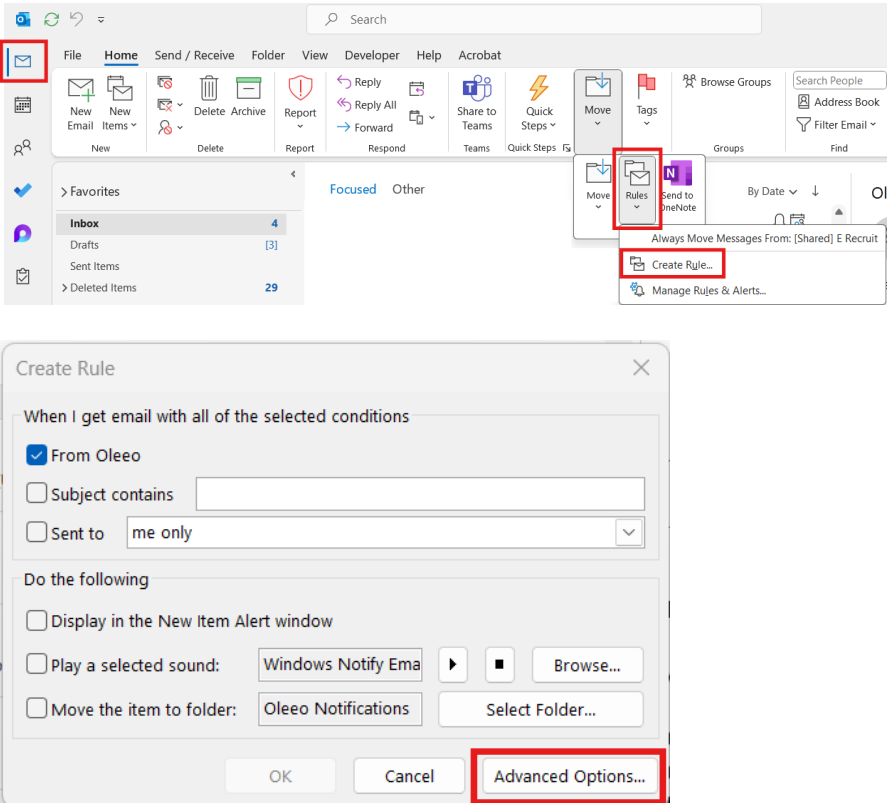
This guide must only be applied if you (Designated Approver) are going on a period of leave and require all upcoming Oleeo approval requests to be forwarded to a Nominated Approver during your absence. If you have already received an Oleeo approval request and would like to delegate the request to another Approver, please follow the "[How to Delegate Existing Approval Requests](#)" user guide.

Important Note: Ensure you inform the relevant Recruitment and Operations teams of who your Nominated Approver is and the period they will be approving on your behalf so that posts are not sent back for approval again.

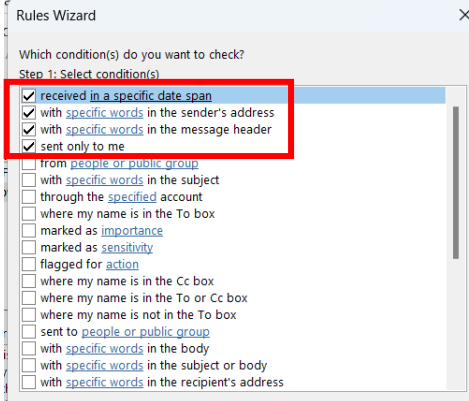
Before you start, please ensure your Nominated Approver:

- 1) Is permitted to approve recruitment and contract variation requests within your area.
- 2) Has an "Approver" profile on Oleeo.
- 3) Has the appropriate Oleeo Organisation Level 2 access to view the request (can be checked with IT).
- 4) Is aware of their responsibility regarding Oleeo approvals during your absence.
- 5) Follows the steps outlined on page 4 within this document.

For account/access queries, please contact the [IT Service Desk](#).

Step/Action	Example/Screenshot
<ol style="list-style-type: none"> 1) On Outlook, go to your inbox. 2) In the top ribbon, "Home" tab, select "Rules" and "Create Rule". 3) Select "Advanced Options". 	 <p>The screenshot shows the Outlook 'Home' ribbon with the 'Rules' group selected. A dropdown menu is open showing 'Create Rule...' and 'Manage Rules & Alerts...'. Below, the 'Create Rule' dialog box is open, showing conditions like 'From Oleeo' and 'Sent to me only'. The 'Advanced Options...' button at the bottom right is highlighted with a red box.</p>

- 4) Tick the following:
- “Received in a specific date span”
 - “With specific words in the sender’s address”
 - “With specific words in the message header”
 - “Sent only to me”



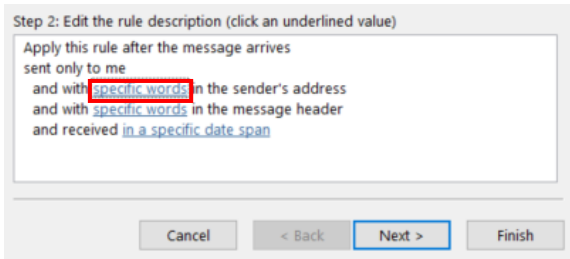
Rules Wizard

Which condition(s) do you want to check?

Step 1: Select condition(s)

- received in a specific date span
- with specific words in the sender's address
- with specific words in the message header
- sent only to me
- from people or public group
- with specific words in the subject
- through the specified account
- where my name is in the To box
- marked as importance
- marked as sensitivity
- flagged for action
- where my name is in the Cc box
- where my name is in the To or Cc box
- where my name is not in the To box
- sent to people or public group
- with specific words in the body
- with specific words in the subject or body
- with specific words in the recipient's address

- 5) Click “specific words in the sender’s address”.

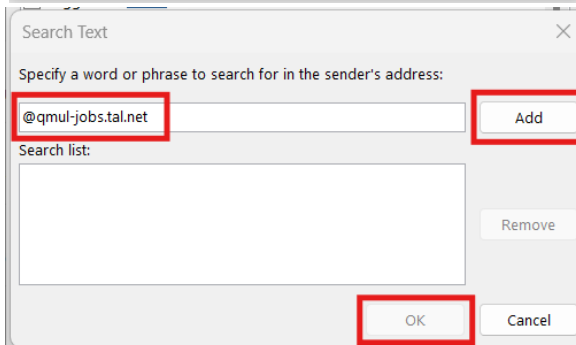


Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
sent only to me
and with specific words in the sender's address
and with specific words in the message header
and received in a specific date span

Cancel < Back Next > Finish

- 6) Type “@qmul-jobs.tal.net”. Select “Add” and then “OK”.



Search Text

Specify a word or phrase to search for in the sender's address:

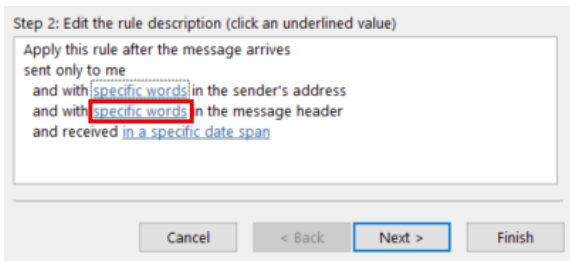
Add

Search list:

Remove

OK Cancel

- 7) Click “specific words in the message header”.

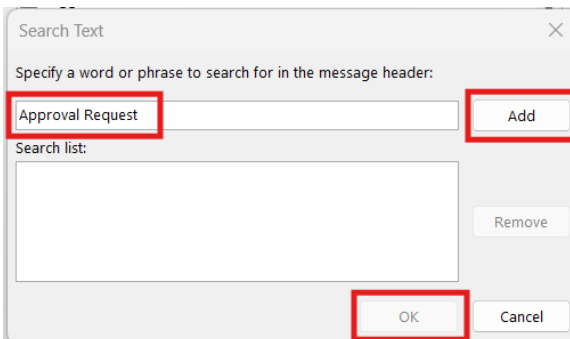


Step 2: Edit the rule description (click an underlined value)

Apply this rule after the message arrives
sent only to me
and with specific words in the sender's address
and with specific words in the message header
and received in a specific date span

Cancel < Back Next > Finish

- 8) Type “Approval Request”. Select “Add” and then “OK”.



Search Text

Specify a word or phrase to search for in the message header:

Add

Search list:

Remove

OK Cancel

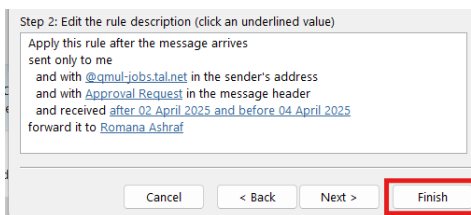
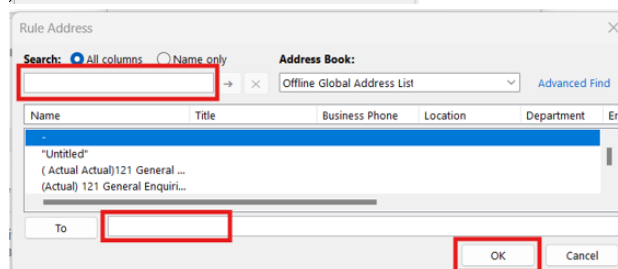
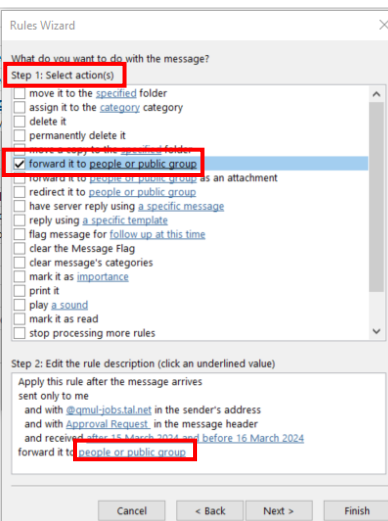
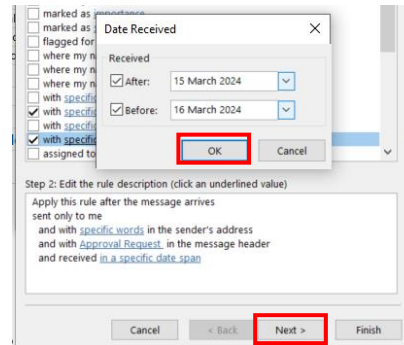
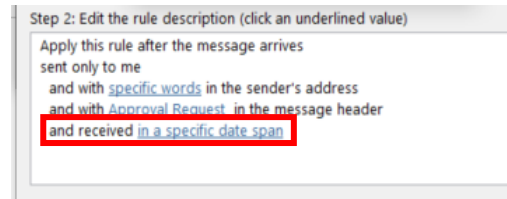
9) Click “in a specific date span”.

10) Enter the dates according to your absence/leave period. Select “OK” and then “Next”.

11) In the “Step 1: Select actions(s)” box, tick “Forward it to people or public group”. Then in the “Step 2” box, click “people or public group”.

12) Search for the person you wish to forward the approval requests to during your absence and double click their name. The name should appear in the “To” box. Then click “OK”.

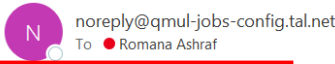
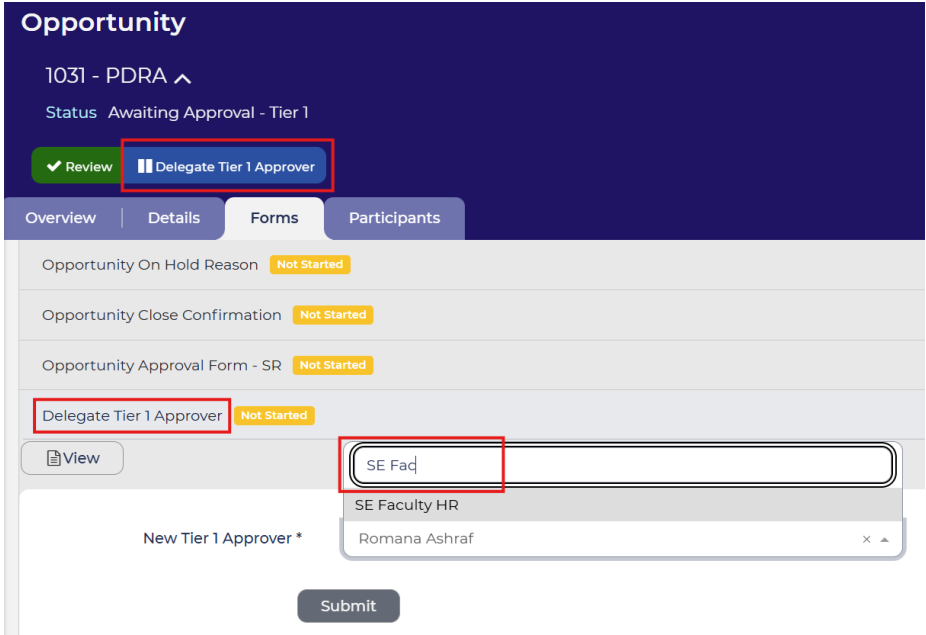
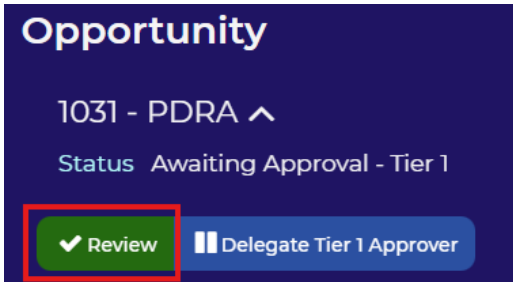
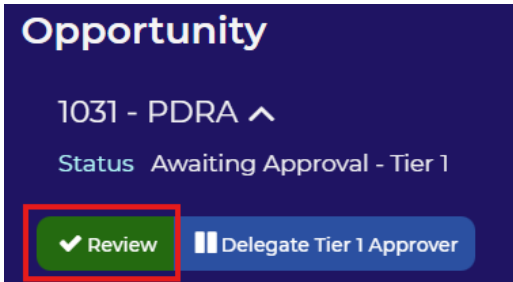
13) Select “Finish”.



You have now set up the forwarding rule within your Outlook and the Nominated Approver will receive all Oleeo approvals during the period you have indicated.

Nominated Approver - Oleeo User Guide

The Nominated Approver must be logged in with their Approver profile and follow the below steps to ensure approvals are captured within Oleeo correctly.

Step/Action	Example/Screenshot
<p>1) Click the Oleeo link in the forwarded Approval Request. This will take you directly to the approval request in Oleeo.</p> <p><i>Please note any forwarded approval requests will include an auto forwarded label within the email as seen here.</i></p>	<p>[EXTERNAL] EHV - 1650 - Approval Request</p> <p> This message was AutoForwarded.</p> <p style="background-color: #fff9c4; padding: 5px;">CAUTION: This email originated from outside of QMUL. Do not click links, scan QR codes or open attachments unless you recognise the se</p> <p>Candidate Name: Test_EHV Test_Last Name Application ID: 1650</p> <p>Visiting application. This request has been raised for the above candidate which requires your approval.</p> <p>Please log into Oleeo to review and action.</p> <p>Note - The link above will take you directly to the request.</p>
<p>2) Click the blue “Delegate Approver” button.</p>	 <p>Opportunity 1031 - PDRA ^ Status Awaiting Approval - Tier 1</p> <p>Review Delegate Tier 1 Approver</p> <p>Overview Details Forms Participants</p> <p>Opportunity On Hold Reason Not Started</p> <p>Opportunity Close Confirmation Not Started</p> <p>Opportunity Approval Form - SR Not Started</p> <p>Delegate Tier 1 Approver Not Started</p> <p><input type="text" value="SE Facd"/> SE Faculty HR</p> <p>New Tier 1 Approver * <input type="text" value="Romana Ashraf"/> x ^</p> <p style="text-align: center;">Submit</p>
<p>3) A Delegate Approver Form will be presented. Type your name as the new Approver and then click “Submit”.</p>	 <p>Opportunity 1031 - PDRA ^ Status Awaiting Approval - Tier 1</p> <p>Review Delegate Tier 1 Approver</p>
<p>4) Once submitted, click the green “Review” button. This will load the approval request form and will allow you to input your approval decision.</p>	 <p>Opportunity 1031 - PDRA ^ Status Awaiting Approval - Tier 1</p> <p>Review Delegate Tier 1 Approver</p>

Full guidance on how to review and approve requests can be found on the [Oleeo Approver Guides page](#).