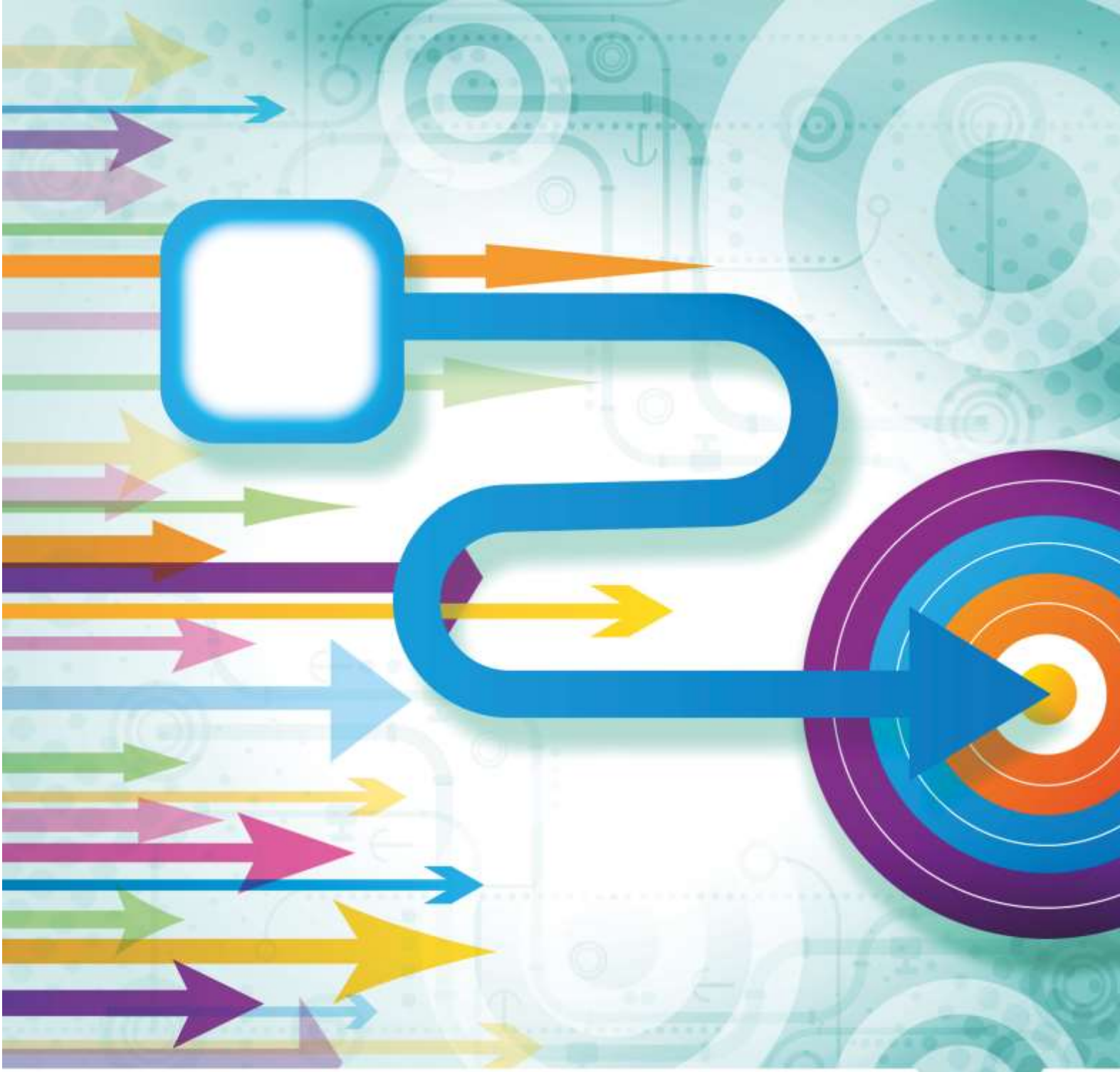
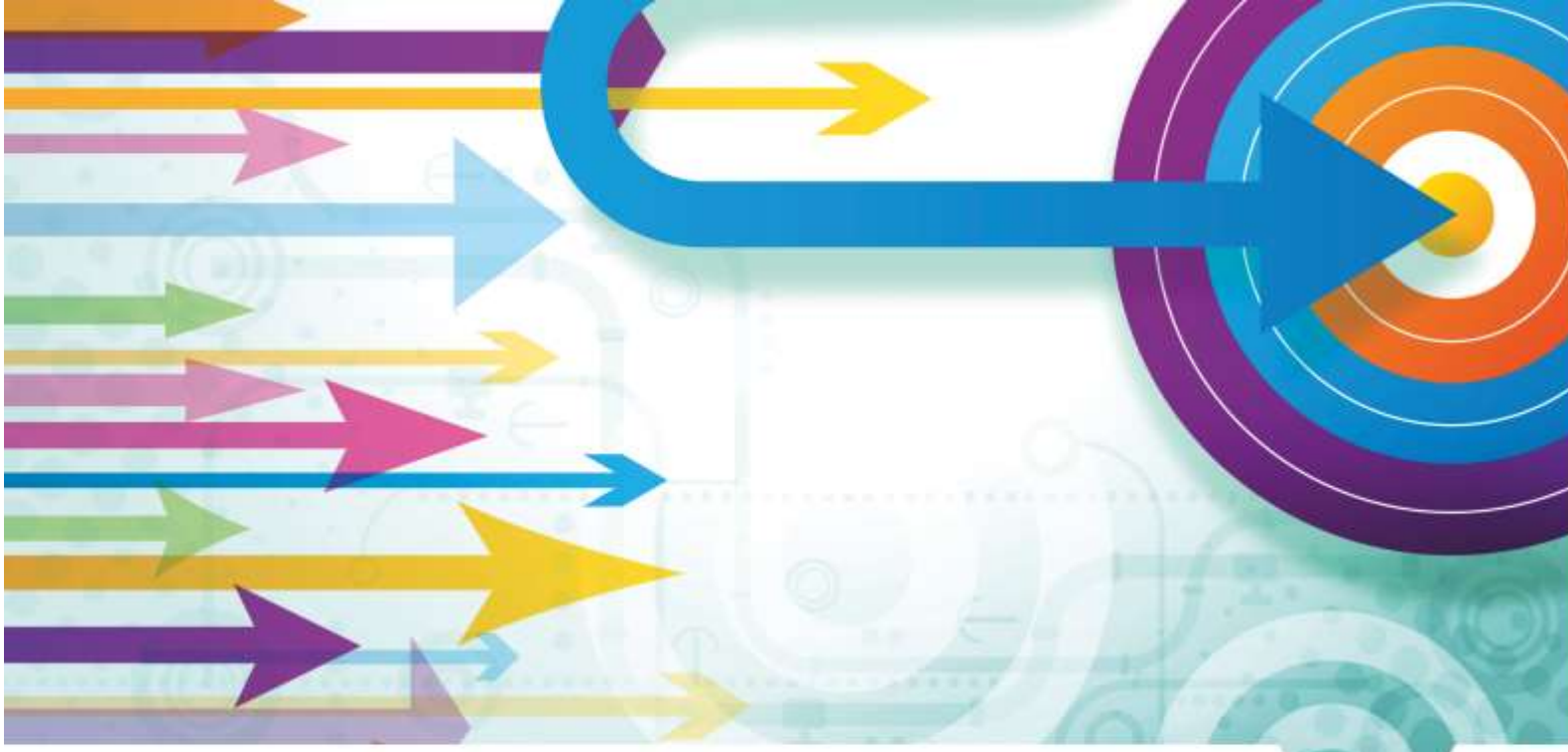


WARWICK

How to…input Overtime in SuccessFactors (including Call Out)



This guide applies to employees who need to input overtime (including call out).

This guide details how to input Overtime (including Call Out) in SuccessFactors.

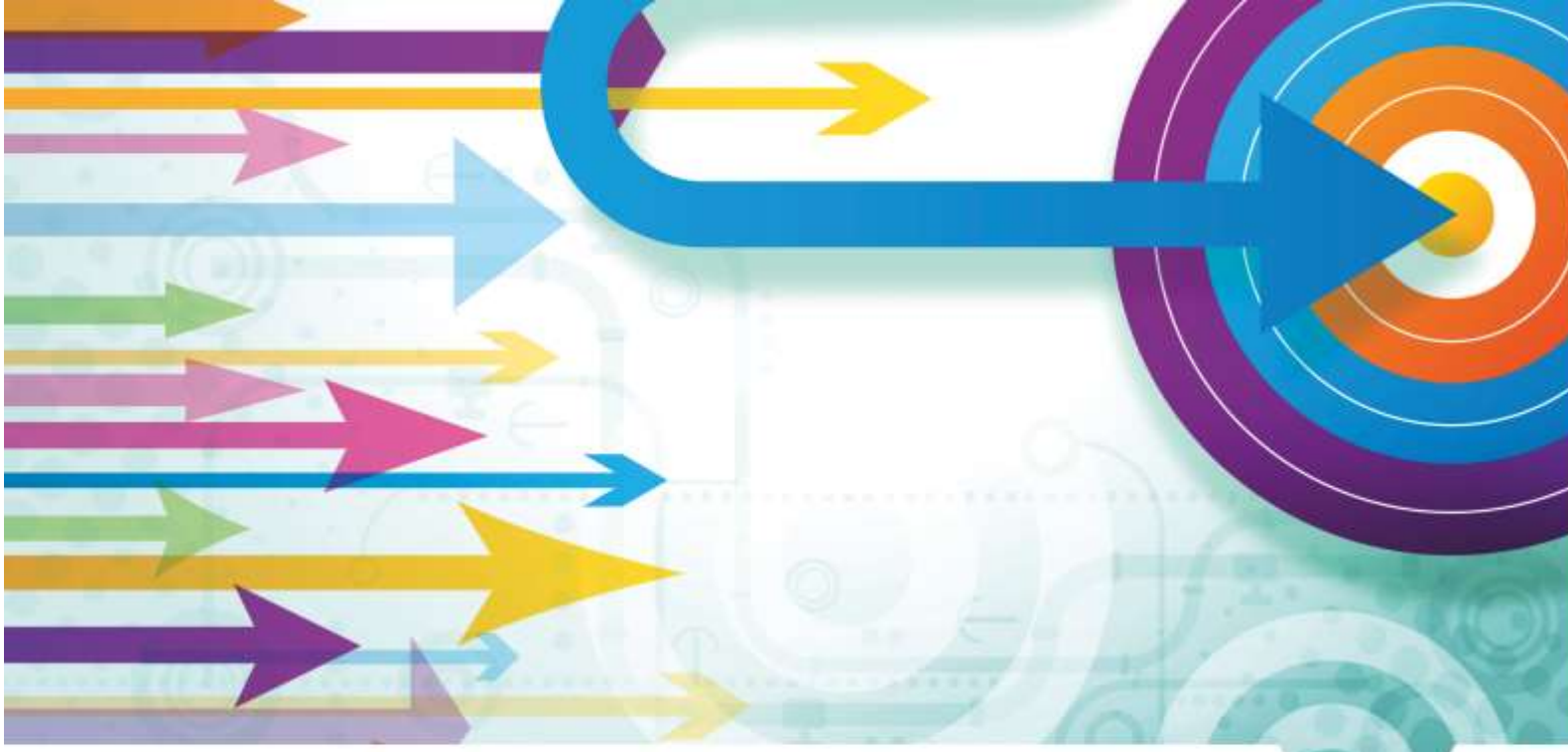
This should be used in conjunction with the Process Map for Overtime.

Please note that the following do not have access to process overtime in SuccessFactors as they are either not entitled to claim overtime or an out of system process applies to them instead. They may however still use the processes outlined within this guide for recording additional hours or call-out:

- All employees on grades 6-9
- Graduate Development Programme
- STP
- Overseas Bureau (Venice and Singapore)
- Non-paid arrangements (i.e. visiting/honorary associates and external secondees not paid by UoW, retired staff association and Emeritus)
- Visiting/Honorary Associates paid by UoW
- Warwick Innovation
- TUPE transferred employees remaining on their original terms & conditions of employment (incl. RCN, BSMMHFT, IFP Academic and Support Staff)

Version History

Version	Date Published	Authored By	Summary of Key Changes
1.0	19/09/19	E Shield/B Hatfield	N/A – first publication



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Contents

Section A – Employee Guidance 3

Introduction 3

Step-by-step instructions 3

Section B – Line Manager Guidance 8

Introduction 8

Step-by-step instructions 8

Approving A Request 9

Delegating A Request 9

Declining A Request 10

Section C – Local Finance Contact Guidance (where applicable) 12

Introduction 12

Step-by-step instructions 12

Approving A Request 13

Delegating A Request 13

Declining A Request 14

Section A – Employee Guidance

Introduction

Employees are responsible for recording any overtime (including call out) in SuccessFactors. This guide explains how to do this.

If you have more than one employment contract you must ensure that you select and record the additional hours against the appropriate contract record.

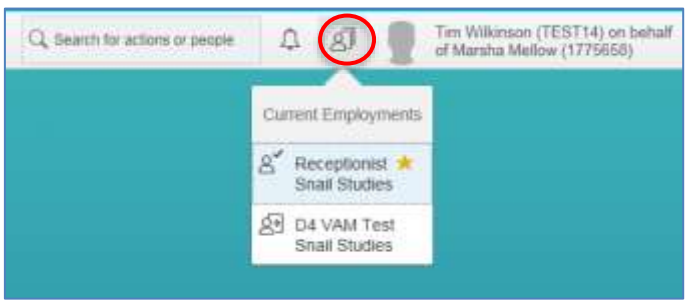
Once additional hours have been submitted, your line manager will receive an email notification instructing them to review and authorise/decline accordingly. Dependant on local arrangements, in some departments the local finance contact will need to authorise claims for additional hours in addition to the line manager.

Once the data has been authorised the additional hours will be transferred into the University's payroll system automatically for payment in the next available monthly pay run.

Step-by-step instructions

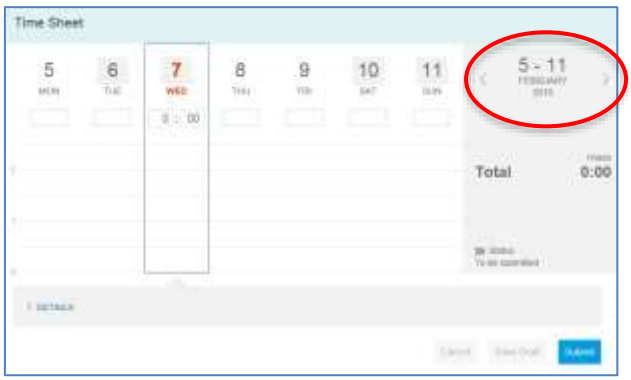
1. Log in to SuccessFactors. You will be taken to your home screen.

2. If you have more than one contract you must ensure that you select and record the hours against the appropriate contract record. To do this click on the icon on the header bar as circled in red below (this icon will only appear if you have more than one contract on the system). The system will have defaulted to your master contract which is denoted by a gold star and a tick will be showing. If you wish to select a different contract then click on it accordingly. The screen will then update, please give it time to do so before following the next steps.



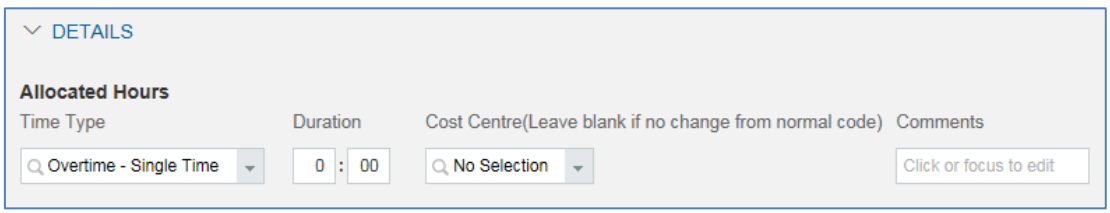
3. Navigate to the **'My Info'** section then click on the **'Time Sheet'** tile.

You will then see the following screen:

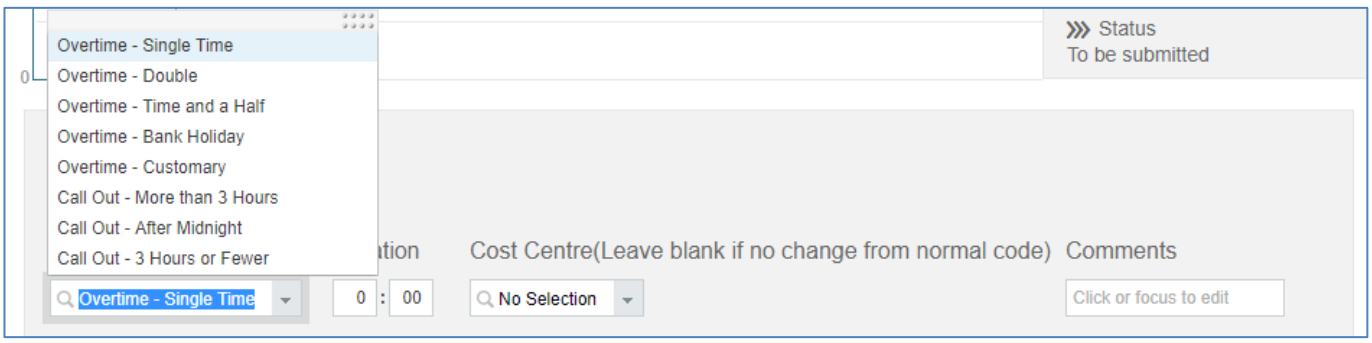


Note: The screen will default to the current week and day. If you wish to record overtime for a different week, click on the left arrow as circled in red above. If you wish to change the day the overtime is relevant to then click on the appropriate date column.

4. Once you have selected the correct day/week, click on **'Details'** in the bottom left hand corner. The following information will appear:



5. Select the appropriate 'time type' from the drop down (it will default to 'Overtime - Single Time'). The options available to an employee who is eligible for overtime are shown in the screenshot below:



Note: The dropdown list that is available to you will only show the types of additional hours that you are eligible to claim, based on your terms and conditions. However, please ensure that you carefully select the correct time type when you are entering a claim for additional hours.

Note: If you need to use any time type that is not currently listed in the dropdown options available, you should submit your request by raising a ticket in the AskHR portal and uploading an additional payment form with the relevant details. The AskHR portal is located on your home page (you should use the Service Category of **'Pay & Benefits'** and the Incident Category of **'General Pay Queries'**).

6. Input the appropriate hours and minutes into the **'Duration'** fields, then click outside of the fields for the data to populate.

7. Only input a cost code into the **'Cost Centre'** field if the cost is to be charged to a code that is different to the one that is already set against your contract, otherwise leave blank.

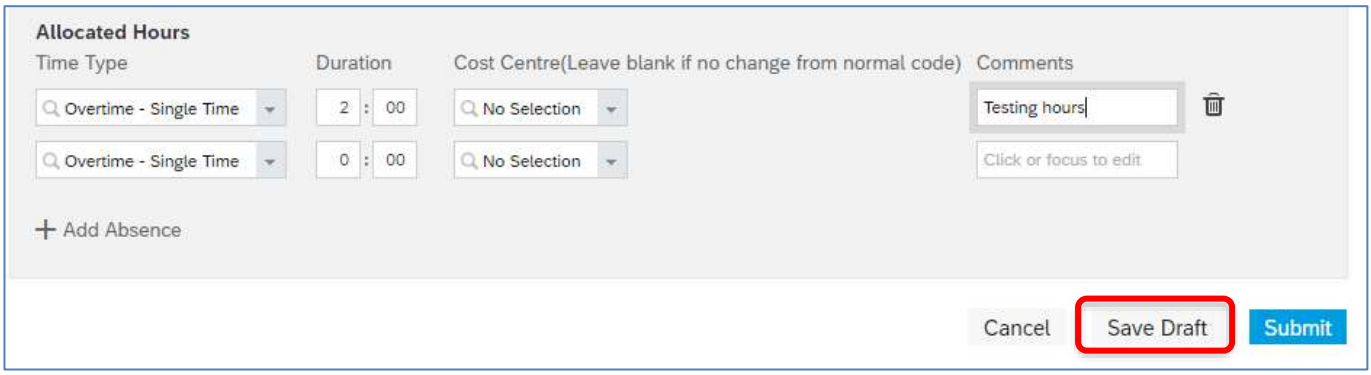
8. If you want to add a comment to remind yourself why you did the additional hours you can do so in the **'Comments'** box, otherwise leave the field blank.

9. Repeat the above steps for each day of the week as appropriate.

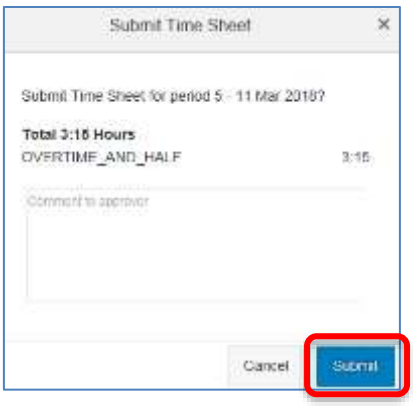
Note: If you make a mistake you can delete an entry by clicking on the bin icon which will appear at the end of each row of entries made.

Note: Only one timesheet can be submitted per week, therefore please ensure you input the complete data for any one week otherwise you will have to either 'withdraw' and re-submit if the original submission has not yet been authorised or 'make amendment' and re-submit if the original submission has already been authorised. The 'withdraw' and 'make amendment' links will show on the timesheet screen in the bottom right hand side of the appropriate week accordingly.

10. If you want to record your additional hours as you go through the week, there is an option to save a draft of your weekly submission so that you can come back to it later on and amend/update it prior to submission. To do this, simply click on the **'Save Draft'** button at the bottom of the screen once you have partially completed your form:



11. When you have ensured that you have recorded all the time for a given week, click on **'Submit'** in the bottom right hand corner. The following pop up screen will appear:



This gives you an opportunity to check the data and to make any comments that you wish to send to your line manager regarding the reason for the additional hours. Click on **'Cancel'** to be taken back to the previous screen to make any amendments. If you are happy then click on **'Submit'**.

12. A notification email will then automatically be sent to your line manager instructing them to authorise the overtime within the system. Your line manager will then review the information submitted and either approve, delegate or decline the request.

13. If your line manager 'declines' your request, the status **'Declined by approver'** will show on the timesheet screen for the appropriate week. You can make any changes and re-submit the request where appropriate otherwise this will be the end of the process.

14. Once your line manager has authorised the workflow within the system it will go to your local finance contact (if your department has requested someone to act in this capacity) before being transferred into the University's payroll system. However, whether the payment details/changes will be processed in the current or following month's payrun is dependent on whether the request has been approved by Payroll before the monthly deadline. Please see here on the HR webpages for further details about the monthly cut-off date.

15. You will receive a notification email to inform you of the outcome of the request such as the one shown below, and the status **'Approved'** will show on the timesheet screen for the appropriate week. The status will only update when the request has been approved by both the line manager and the local finance contact where the local finance contact exists.

The following action has been approved:

Event reason: Correct Employee Time Sheet
Action relates to: Marsha Mellow
Approved by: Jason Gale

Please click here for further information.

Please note: this is an automated email from an account that is not monitored.
If you have any queries, contact hr.services@warwick.ac.uk

SAP SuccessFactors

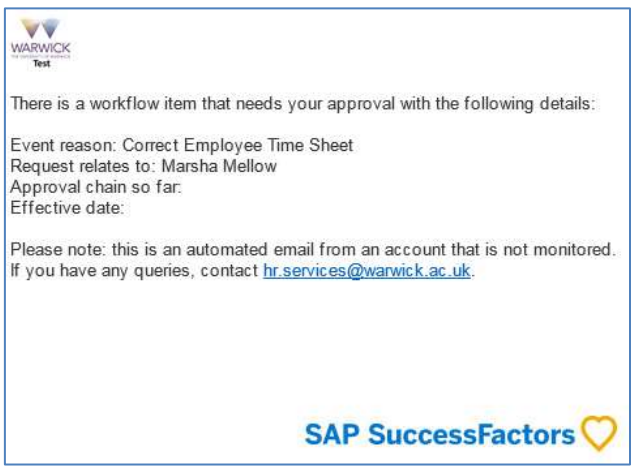
Section B – Line Manager Guidance

Introduction

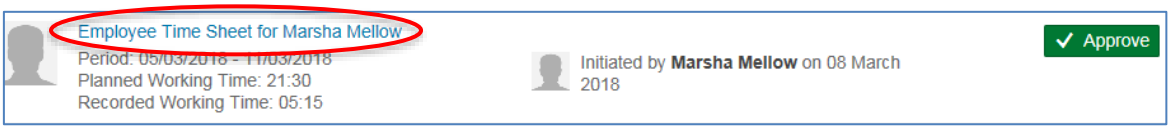
When an employee submits a request for additional hours (including call out) in SuccessFactors, their line manager's authorisation will be required.

Step-by-step instructions

1. When one of your direct reports submits a request for additional hours or overtime within SuccessFactors you will receive a notification email, such as the one shown below, informing you that a workflow is awaiting your review and approval:



2. From your SuccessFactors home screen under the **'To Do'** section click on the **'Approve Requests'** tile, then click on the relevant blue hyperlinked **'Employee Time Sheet for….'** as circled in red below:



You will then be automatically redirected to the workflow details screen as shown below:

3. If you wish you can type into the comment box then click on the **'Post'** button to save your comment on the workflow. Your comments will appear on the right hand side of the screen under **'Activity'**.

4. You now have a choice as to whether to 'Approve', 'Delegate' or 'Decline' the overtime request and each option is set out below:

Approving A Request

5. To approve a request, click on the **'Approve'** button at the bottom of the screen. A message will appear briefly on screen confirming that the changes have been successfully made. You will then be routed back to your home page and the request will have disappeared from your **'To Do'** list.

Note: Where there is no local finance contact, the employee who made the request will receive a notification email to inform them that their request has been approved. The overtime will be transferred into the University's payroll system automatically for payment in the next available monthly pay run.

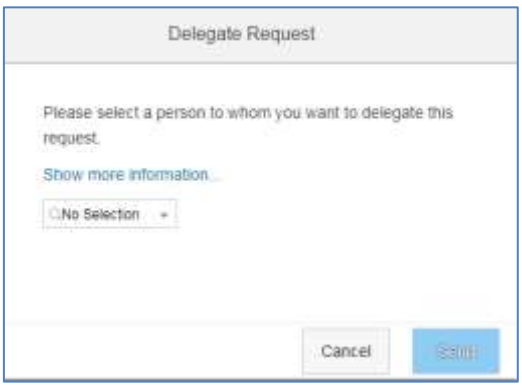
Where there is a local finance contact, your approval will trigger a further workflow request to them to review the request before it is transferred to the University's payroll system.

Delegating A Request

6. If you decide to delegate the approval of the request (e.g. in cases where the overtime has been worked on the request of another line manager), you should add some comments to explain your decision as per the instructions in step 3 above.

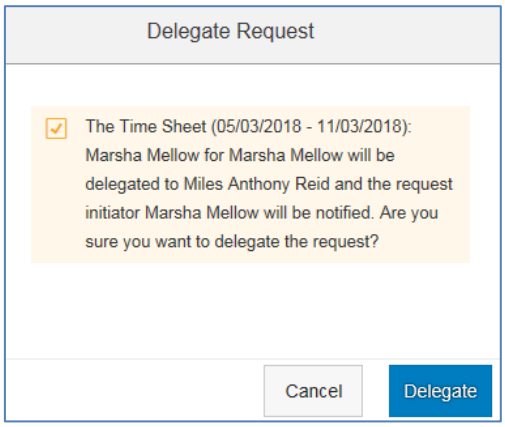
Note: When you use the **'Delegate'** function, the person you are delegating to will be able to see all details contain within the request you have sent to them, regardless of the permissions that they have in the system. They will not, however, have the same access as you outside of the request concerned (unless they do so normally). You are responsible for ensuring that you only delegate workflow requests to colleague for whom it is appropriate to see the personal data of your direct report and the type of request that they are making. This is vital for enabling compliance with data protection legislation and the University's data protection policy.

7. Click on the **'Delegate'** button and the following screen will appear:



8. Start to type into the search box either the name or University ID number of the person you are delegating the approval of the request to. The options will filter as you begin typing. Click on the correct name and click on **'Send'**.

9. You will then be given the opportunity to confirm that you wish to delegate the request:

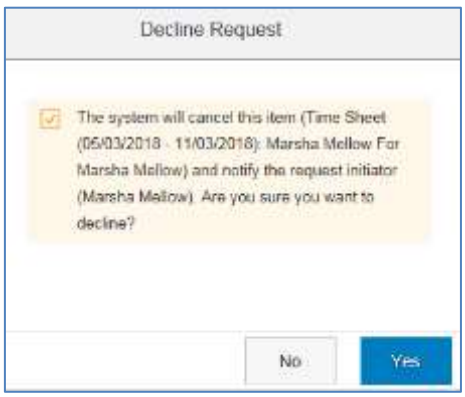


10. To confirm, click on the **'Delegate'** button and the person you have delegated to will receive an email to notify them about the delegation. If you have selected the wrong person click on the **'Cancel'** button and you will be returned to the workflow details screen where you can repeat the process and select the correct person.

Declining A Request

11. If you decide to decline the request, you should add some comments to explain your decision as per instructions in step 3 above.

12. Click on the **'Decline'** button. The following pop up screen will appear:



Click on **'Yes'** to decline the request or click on **'No'** to go back to the previous screen.

13. If you do decline, the employee who made the request will receive an email to inform them that you have declined the request and that a comment has been posted that they may wish to review. They can make any changes and re-submit the request where appropriate, otherwise this will be the end of the process.

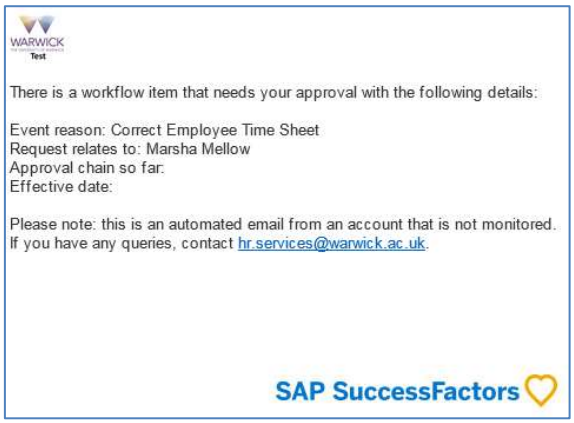
Section C – Local Finance Contact Guidance (where applicable)

Introduction

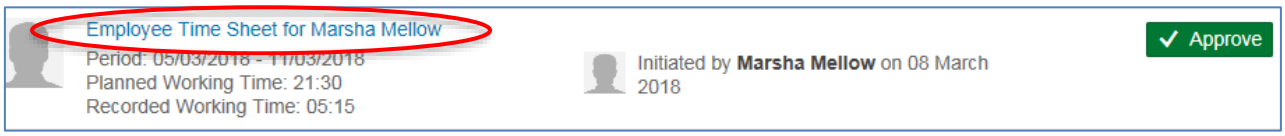
When an employee submits a request for additional hours or overtime (including call out) in SuccessFactors, their line manager's authorisation will be required. Once a line manager has approved an overtime request within Successfactors, the workflow will go to the Local Finance Contact for final review where the department has requested a system role of Local Finance Contact.

Step-by-step instructions

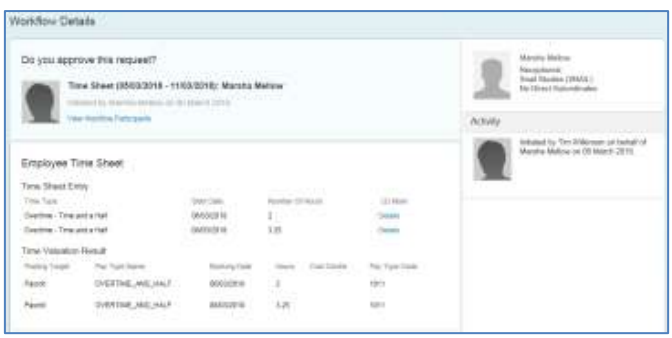
1. When one of your department's line managers authorises additional hours or overtime for an employee within SuccessFactors you will receive a notification email such as the one shown below informing you that a workflow is awaiting your review and approval:



2. From your SuccessFactors home screen under the **'To Do'** section click on the **'Approve Requests'** tile, then click on the relevant blue hyperlinked **'Employee Time Sheet for….'** as circled in red below:



You will then be automatically redirected to the workflow details screen as follows:



3. If you wish you can type into the comment box then click on the **'Post'** button to save your comment on the workflow. Your comments will appear on the right hand side of the screen under **'Activity'**.

4. You now have a choice as to whether to 'Approve', 'Delegate' or 'Decline' the overtime request and each option is set out below:

Approving A Request

5. To approve a request, click on the **'Approve'** button at the bottom of the screen. A message will appear briefly on screen confirming that the changes have been successfully made. You will then be routed back to your home page and the request will have disappeared from your **'To Do'** list.

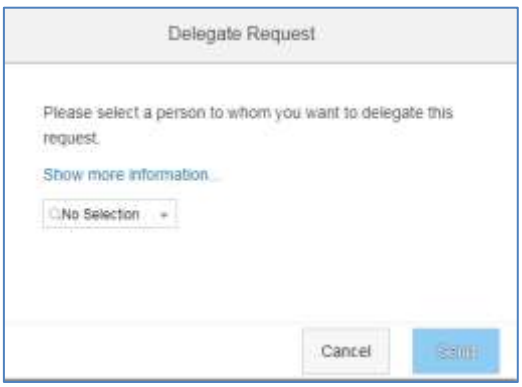
Note: The employee who made the request will receive a notification email to inform them that their request has been approved. The overtime will be transferred into the University's payroll system automatically for payment in the next available monthly pay run.

Delegating A Request

6. In the unlikely event that you decide to delegate the approval of the request (e.g. to another member of the department's local finance team), you should add some comments to explain your decision as per the instructions in step 3 above.

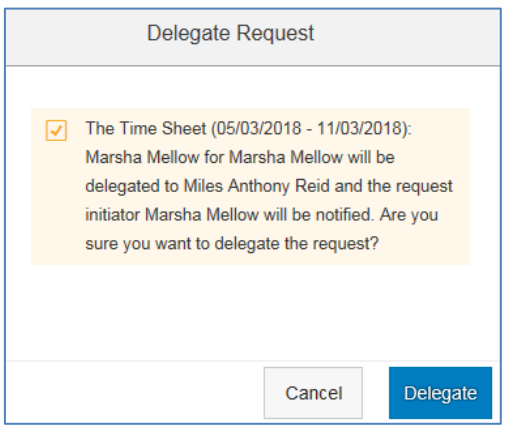
Note: When you use the **'Delegate'** function, the person you are delegating to will be able to see all details contain within the request you have sent to them, regardless of the permissions that they have in the system. They will not, however, have the same access as you outside of the request concerned (unless they do so normally). You are responsible for ensuring that you only delegate workflow requests to colleague for whom it is appropriate to see the personal data of the individual and the type of request that they are making. This is vital for enabling compliance with data protection legislation and the University's data protection policy.

7. Click on the **'Delegate'** button and the following screen will appear:



8. Start to type into the search box either the name or University ID number of the person you are delegating the approval of the request to. The options will filter as you begin typing. Click on the correct name and click on **'Send'**.

9. You will then be given the opportunity to confirm that you wish to delegate the request:

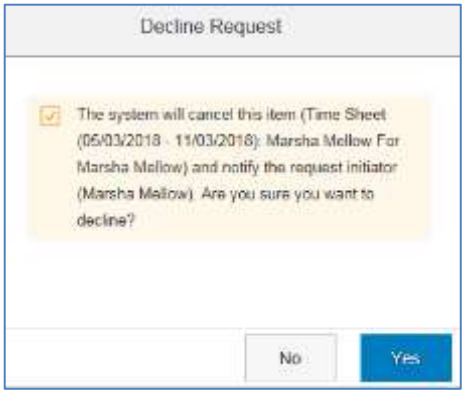


10. To confirm, click on the **'Delegate'** button and the person you have delegated to will receive an email to notify them about the delegation. If you have selected the wrong person click on the **'Cancel'** button and you will be returned to the workflow details screen where you can repeat the process and select the correct person.

Declining A Request

11. If you decide to decline the request, you should add some comments to explain your decision as per instructions in step 3 above.

12. Click on the **'Decline'** button. The following pop up screen will appear:



Click on **'Yes'** to decline the request or click on **'No'** to go back to the previous screen.

13. If you do decline, the employee who made the request and the line manager who initially authorised the request will receive an email to inform them that you have declined the request and that a comment has been posted that they may wish to review. They can make any changes and re-submit the request where appropriate, otherwise this will be the end of the process.