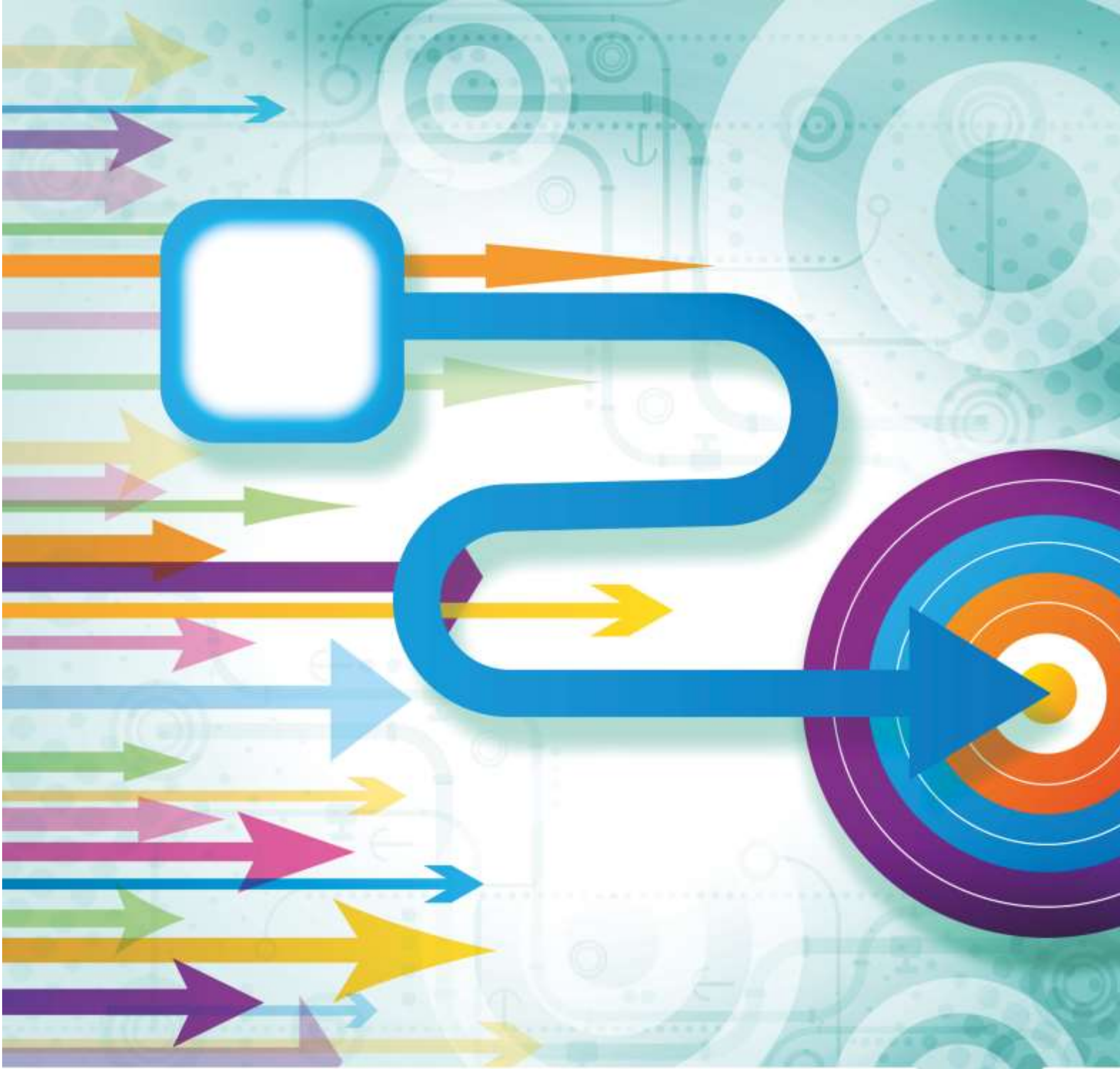
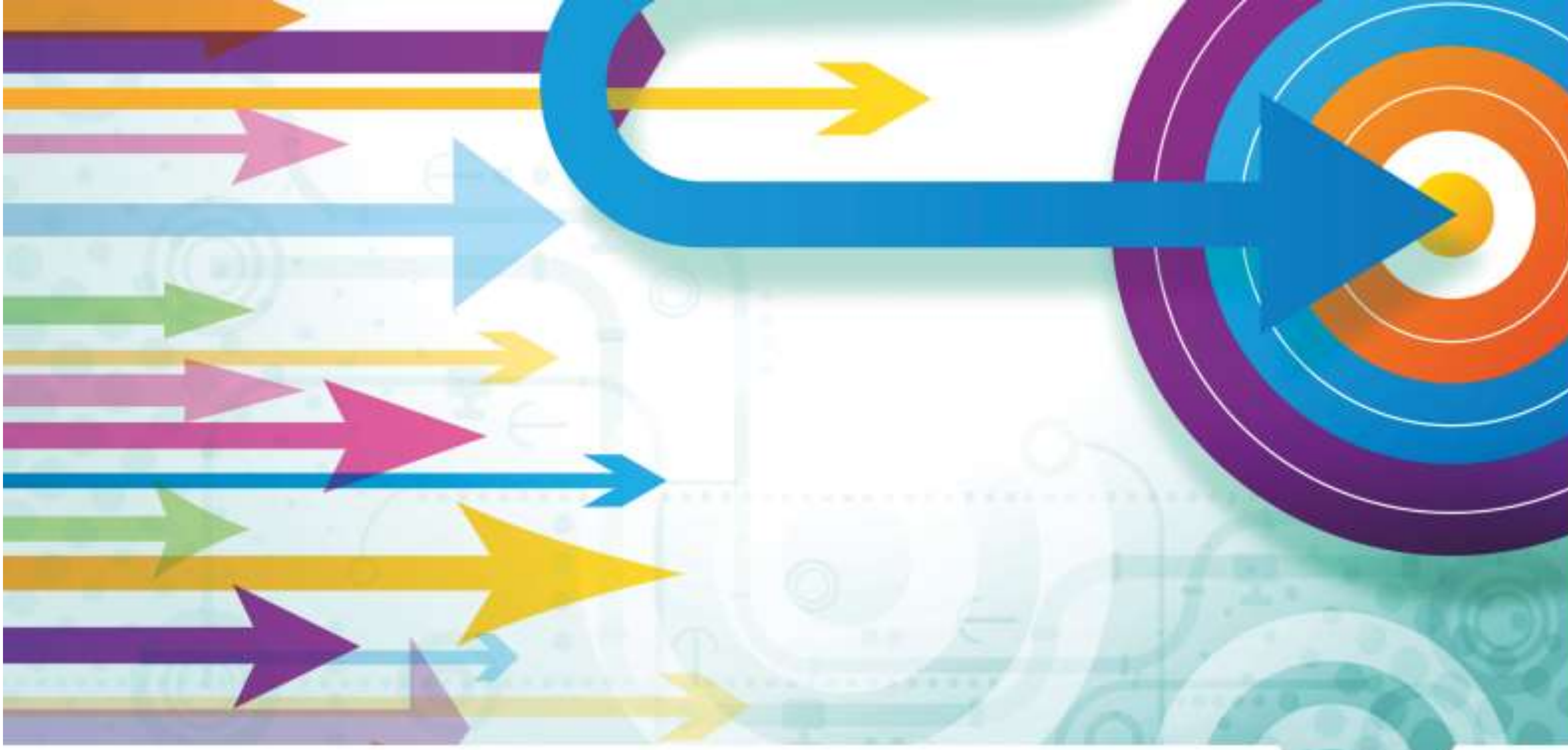


WARWICK

# How to…record variable hours in SuccessFactors



# This guide applies to workers who need to input all hours worked for a variable/temporary work assignment.

This guide details how to record hours worked by variable workers in SuccessFactors.

The following list details occasions where a variable worker will not be able to record the hours that they have worked within the timesheet functionality in SuccessFactors:

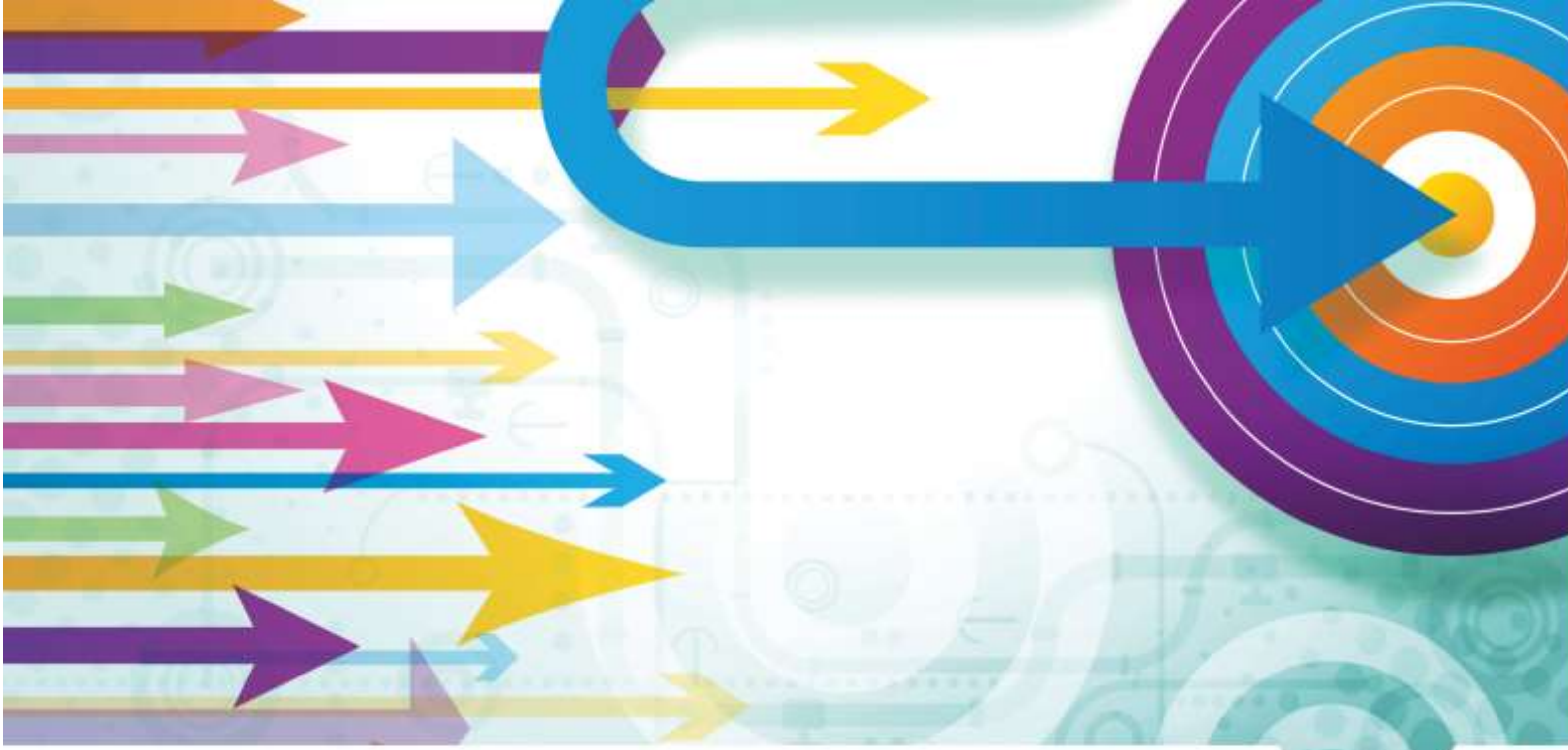
- Where a variable worker holds two or more assignments of the same type of work but with differing rates of pay
- Where payment for a variable work assignment is to be made on a ‘lump sum’ basis rather than on an hourly rate

In the above cases, instructions as to how such hours need to be recorded and submitted to Payroll will be available from your Department Administrator.

This should be used in conjunction with the Process Map for Temporary/Variable Worker Timesheet.

## Version History

| Version | Date Published | Authored By | Summary of Key Changes |
|---|---|---|---|
| 1.0 | 28/09/19 | E Shield/B Hatfield | N/A – first publication |
| | | | |
| | | | |



## Contents

# Section A – Worker Guidance

## Introduction - definitions

Workers are responsible for ensuring that all hours worked are recorded and submitted to Payroll. In most cases, this will mean recording those hours in SuccessFactors. This guide explains how to do this.

Within SuccessFactors, whether a request to undertake a piece of work is classified as a unique assignment is determined by the type of work that someone undertakes. There are currently three different types of work that can be undertaken and paid for via the variable payroll:

- Exam invigilation equivalent to grades 1 – 4
- Sessional teacher in WMG, WMS, WBS equivalent to grade 5 – 9 or external examiner
- Other non-academic work equivalent to grade 9

It is only possible to set one hourly rate per assignment and when your first variable work assignment was set up in SuccessFactors this hourly rate will have been set against the assignment record. Therefore, if you are subsequently asked to take up an additional assignment with a different rate of pay, you will not be able to record hours worked for either assignment within the SuccessFactors timesheet tool. For example, if you hold an assignment for a piece of work that is classified as 'Non-Teaching Professional' at £20 per hour and are then asked to undertake another piece of work of a similar type to be paid at £23 per hour, you will not be able to use the timesheet function to record your hours worked. In this case, your department will advise payroll of the amount you should be paid via the transmission of a spreadsheet.

Similarly, if payment for your assignment is due to be made in one or more fixed amounts rather than on an hourly basis, you will not need to record your hours in SuccessFactors as your department will inform Payroll directly when a payment needs to be made.

Your Department Administrator should advise you of which method you should be using to record your hours worked.

## Overview of Process

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

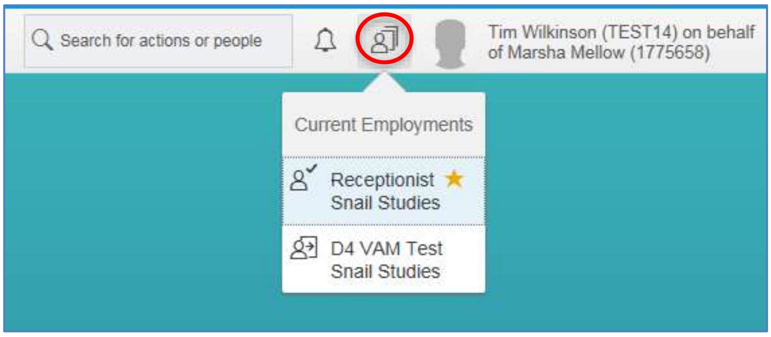
Once the inputted hours have been submitted, your line manager will receive an email notification instructing them to review and authorise/decline accordingly. Dependant on local arrangements in some departments the local finance contact may need to authorise in addition to the line manager.

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

## Step-by-step instructions

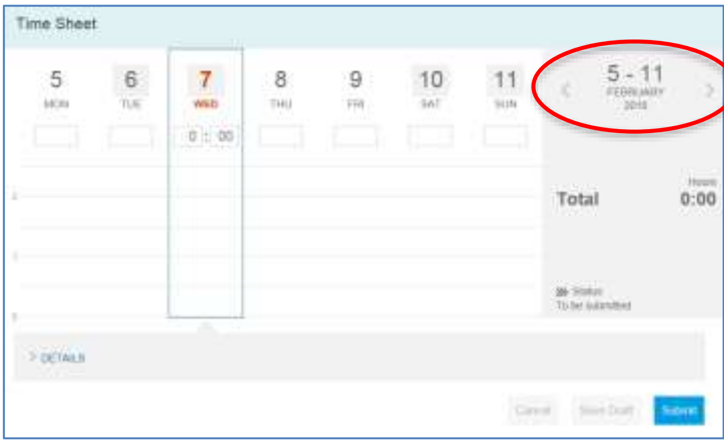
1. Log in to SuccessFactors and you will be taken to your home screen.

2. If you have more than one assignment you must ensure that you select and record the hours against the appropriate assignment 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 assignment on the system). The system will have defaulted to your master assignment which is denoted by a gold star and a tick will be showing. If you wish to select a different assignment then click on it accordingly. The screen will then update, please give it time to do so before following the next steps.



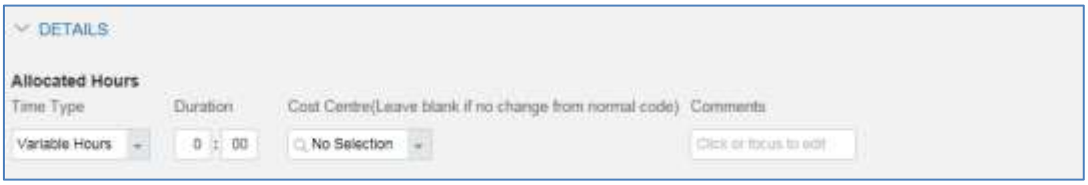

3. Navigate to the **'My Info'** section then click on the **'Time Sheet'** tile.


You will then see the following screen:



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

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




5. The 'time type' will default to **'Variable Hours'**, this is only time type that will be available to you.

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 assignment, otherwise leave this field blank.

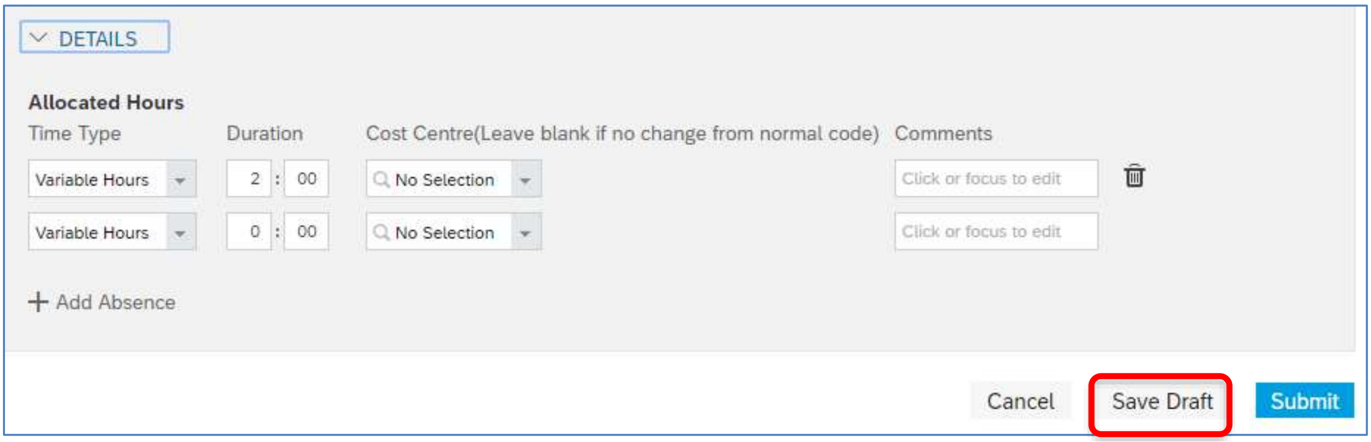
8. If you want to add a comment to remind yourself why you did the additional hours you can do so in the **'Comments'** box, otherwise leave the field blank. If you have added a different cost centre in the cost centre field in step 7, you must indicate this in the **'Comments'** box.

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

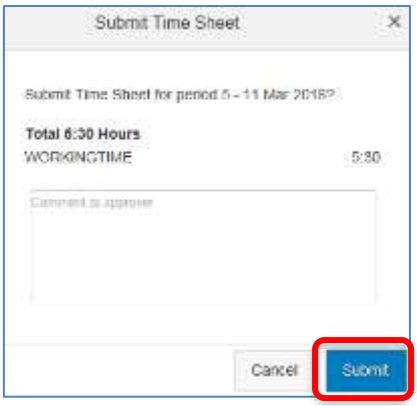
Note: If you make a mistake you can delete an entry by clicking on the bin icon which will appear at the end of each row of entries made.

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 hours worked 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. 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 timesheet 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 automatically for payment in the next available monthly pay run. 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

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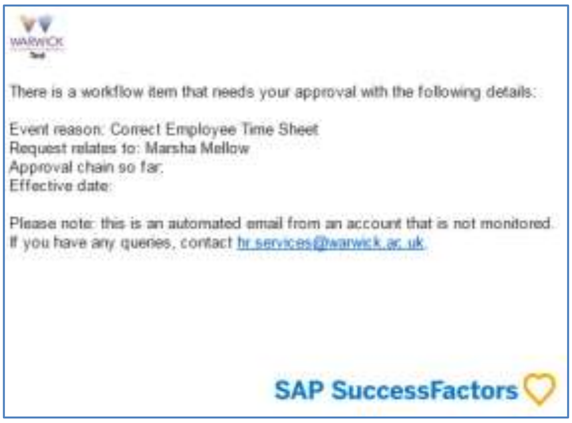
# Section B – Line Manager Guidance

## Introduction

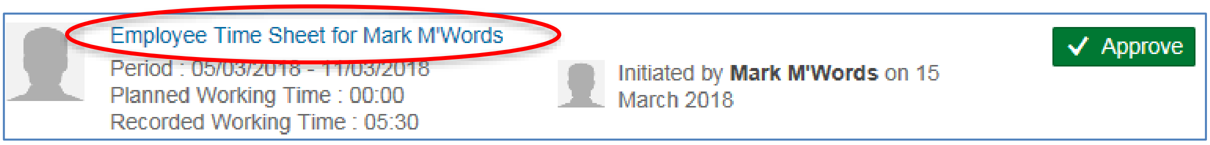
When an individual submits hours worked for a variable worker assignment in SuccessFactors, their line manager's authorisation will be required and where a Local Finance Contact has been specified, the workflow will also go to them for final approval.

## Step-by-step instructions

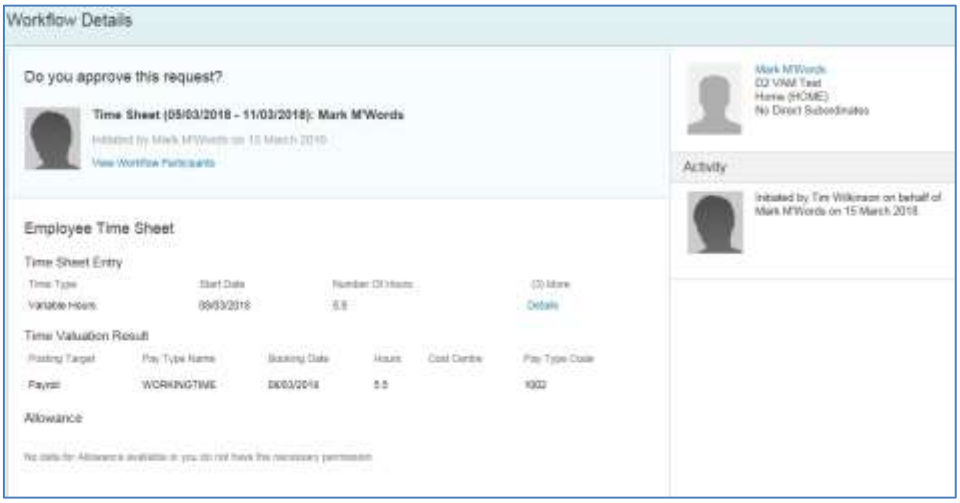
1. When a variable worker for whom you are the designated approver submits hours worked for an assignment within SuccessFactors you will receive a notification email, such as the one shown below, informing you that a workflow is awaiting your review and approval:




2. From your SuccessFactors home screen under the **'To Do'** section click on the **'Approve Requests'** tile, then click on the relevant blue hyperlink 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 worked hours 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 individual who made the request will receive a notification email to inform them that their request has been approved. The hours worked will be transferred into the University's payroll system automatically for payment in the next available monthly pay run.

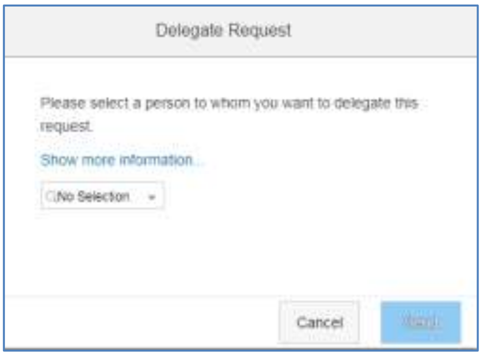
Where there is a local finance contact, your approval will trigger a further workflow request to them to review the request before it is transferred to the University's payroll system.

## Delegating A Request

6. If you decide to delegate the approval of the request (e.g. in cases where the hours were 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.

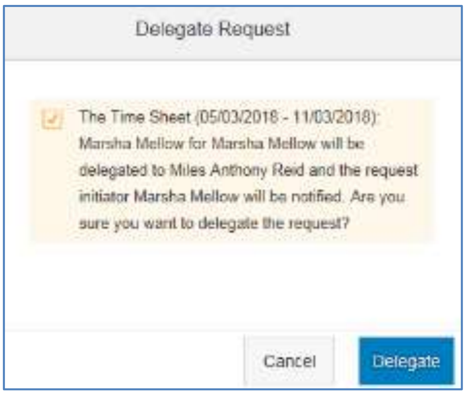
Note: When you use the **'Delegate'** function, the person you are delegating to will be able to see all details contain within the request you have sent to them, regardless of the permissions that they have in the system. They will not, however, have the same access as you outside of the request concerned (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 another 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 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:

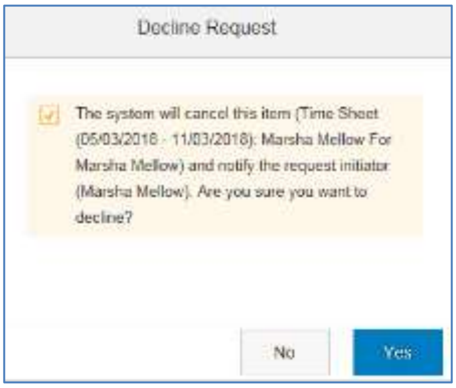


10. To confirm, click on the **'Delegate'** button and the person you have delegated to will receive an email to notify them about the delegation.  If you have selected the wrong person click on the **'Cancel'** button and you will be returned to the workflow details screen where you can repeat the process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

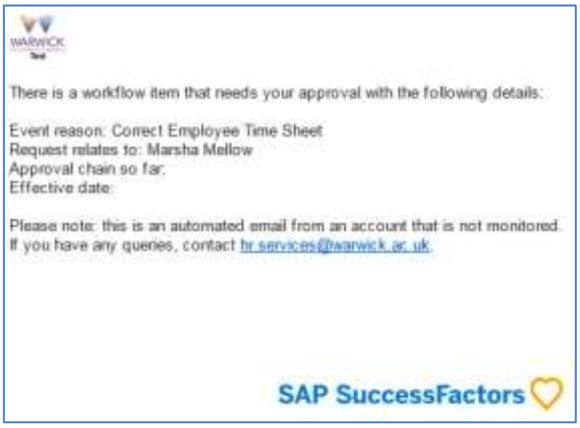
# Section C – Local Finance Contact Guidance (where applicable)

## Introduction

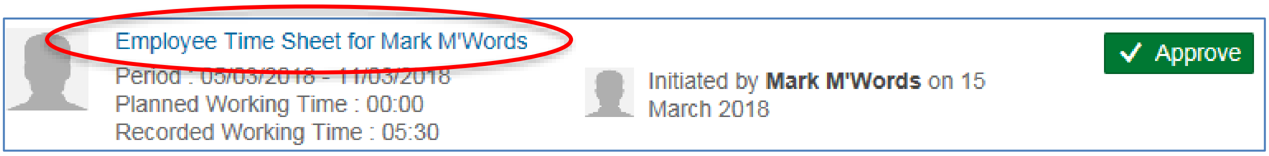
When a worker submits data for the hours they have worked in SuccessFactors, their line manager's authorisation will be required. Once a line manager has approved a request within Successfactors, the workflow will go to the Local Finance Contact for final review where the department has requested a system role of Local Finance Contact.

## Step-by-step instructions

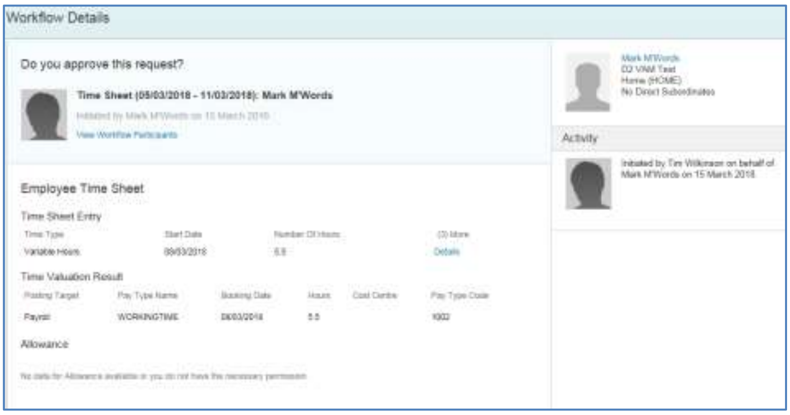
1. When one of your department's line managers authorises variable hours worked for an individual's assignment within SuccessFactors you will receive a notification email such as the one shown below informing you that a workflow is awaiting your review and approval:




2. From your SuccessFactors home screen under the **'To Do'** section click on the **'Approve Requests'** tile, then click on the relevant blue hyperlink 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 worked hours 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.

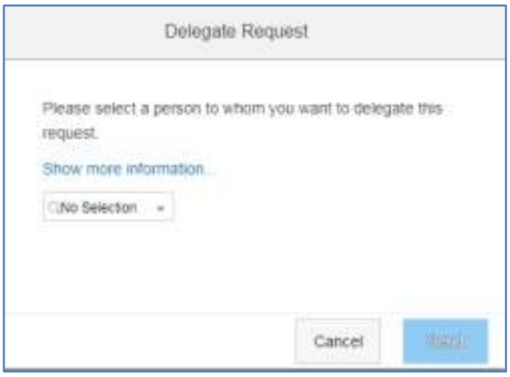
Note: The individual who made the request will receive a notification email to inform them that their request has been approved. The hours will be transferred into the University's payroll system automatically for payment in the next available monthly pay run.

## 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.

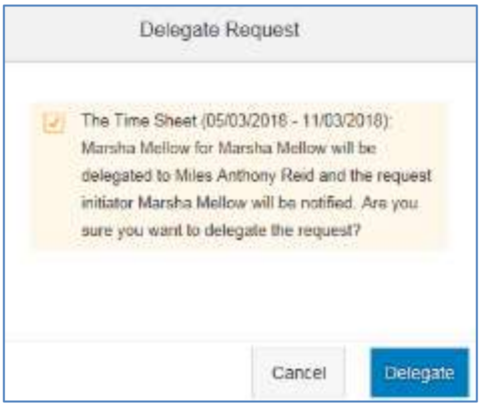
Note: When you use the **'Delegate'** function, the person you are delegating to will be able to see all details contain within the request you have sent to them, regardless of the permissions that they have in the system. They will not, however, have the same access as you outside of the request concerned (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 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:

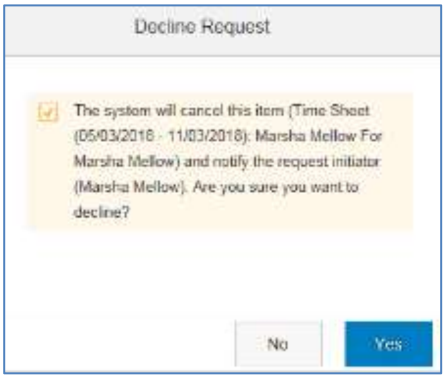



10. To confirm, click on the **'Delegate'** button and the person you have delegated to will receive an email to notify them about the delegation. If you have selected the wrong person click on the **'Cancel'** button and you will be returned to the workflow details screen where you can repeat the process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