UNIVERSITY OF CAPE TOWN
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UCT HR Employee Self-Service (ESS) guide for managers

Issued by UCT Human Resources
August 2026

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Logging in to UCT HR Employee Self-Service (ESS)

Background

Staff members in a management role have additional access in HR Employee Self-Service to allow them to manage their team's leave requests along with approving paid-on-claim hours and PASS overtime/standby hours.

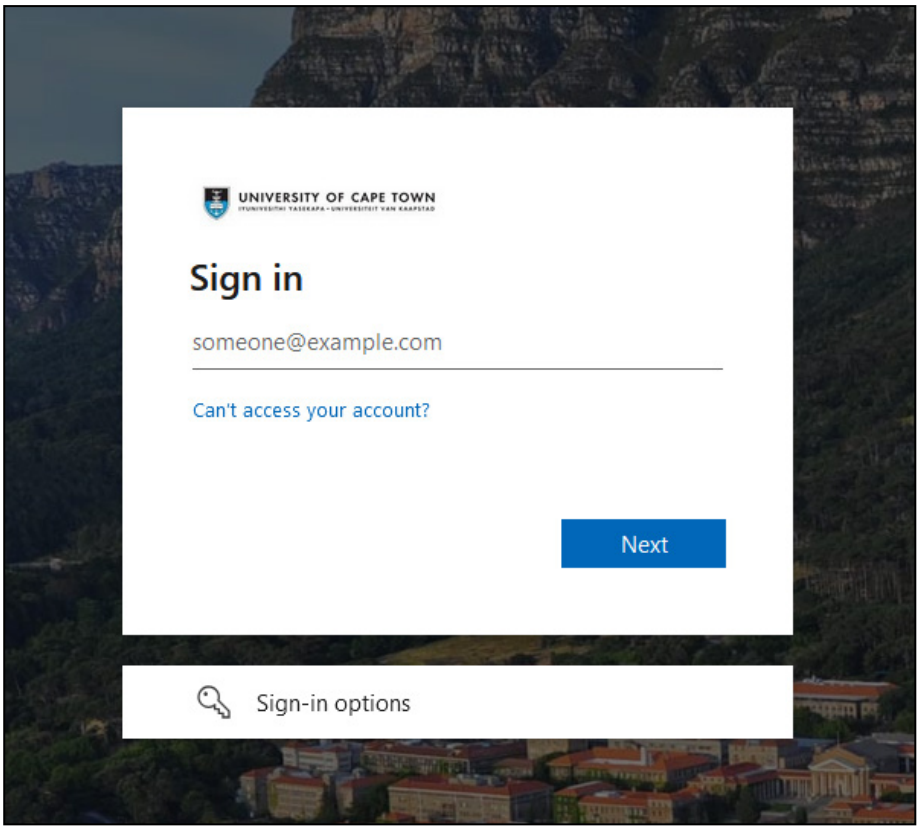
Support

The HR Employee Self-Service page on the HR website contains instruction guides, Frequently Asked Questions and demonstration videos.

If you are unable to access HR Employee Self-Service or are experiencing other technical difficulties, please contact the ICTS Helpdesk. If you have an HR-related query, please contact the HR Administrator for your area.

Procedure

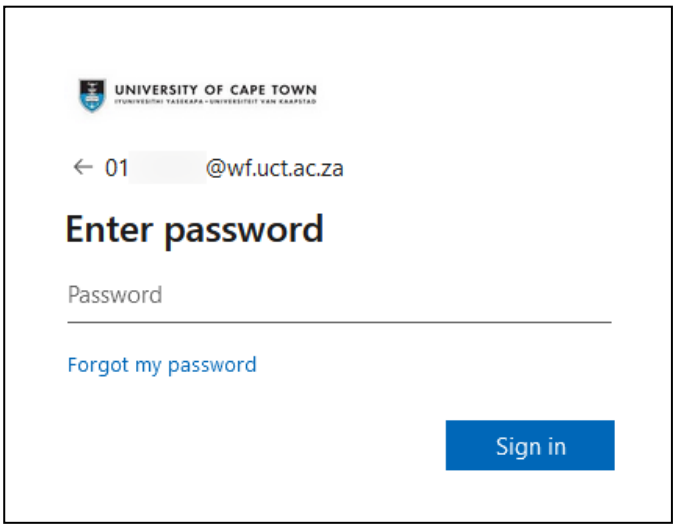
1. Open a web browser (e.g. Google Chrome, Mozilla Firefox, Microsoft Edge).
2. Log in to UCT HR Employee Self-Service via https://sapfiori.uct.ac.za.
   Note: You can also access Employee Self-Service via the HR website by clicking *HR Employee Self-Service* at the top of the page.
3. If not already logged in, the *Sign in to your account* page appears. If already logged in, the *Home* page immediately appears (see step 5).



   - Enter your UCT staff number followed by @wf.uct.ac.za, e.g. 01234567@wf.uct.ac.za.
     Note: UCT staff number only, third party "T" accounts do not have access to HR Employee Self-Service.
   - Click Next.

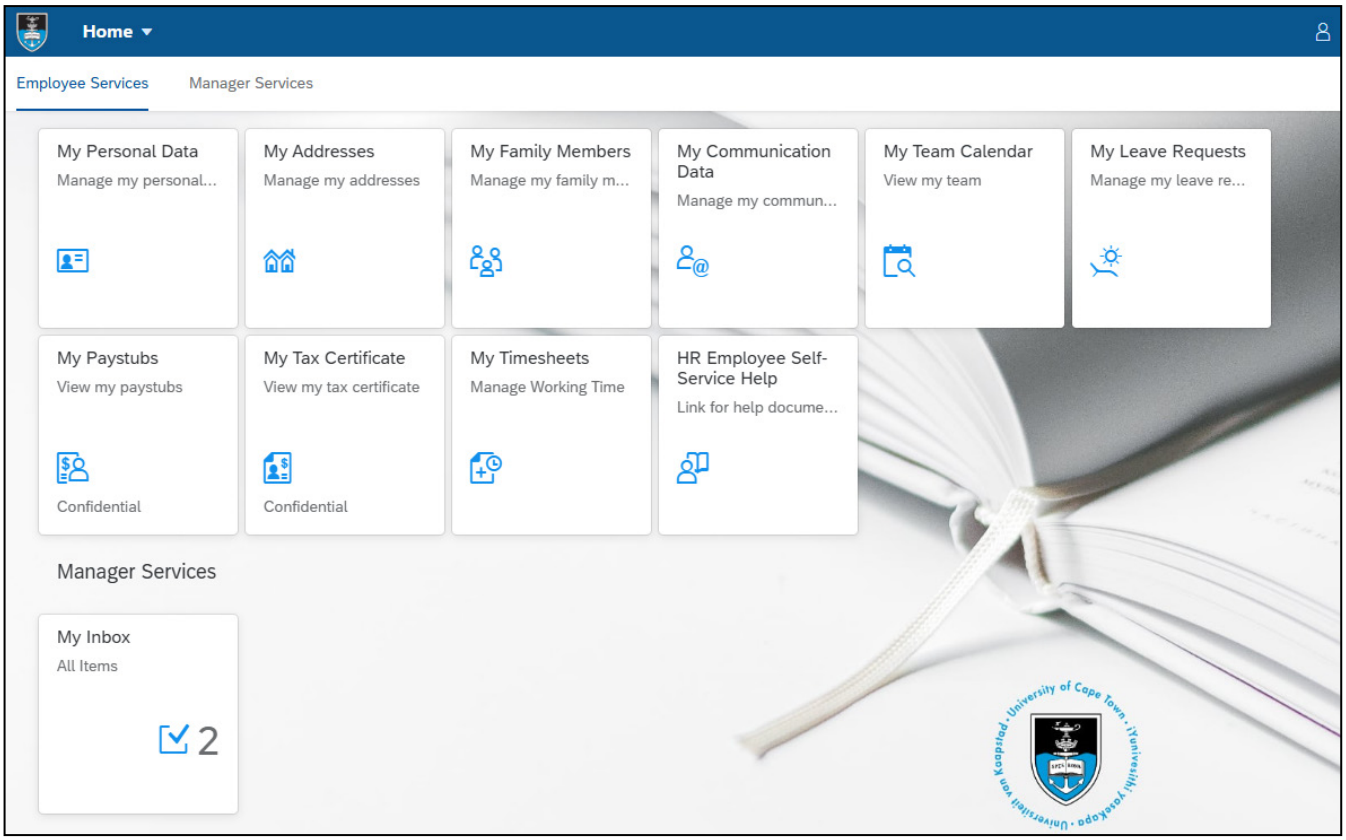
Logging in to UCT HR Employee Self-Service (ESS)

4. The *Enter password* page appears.



- In the *Password* field, enter your network password.
- Click Sign in.
- You will be prompted to verify your login either via Microsoft Authenticator or a code sent to your phone as an SMS.

5. The *Home* page appears.



- For assistance with the features listed under *Employee Services*, view the HR Employee Self-Service (ESS) guide.

Logging in to UCT HR Employee Self-Service (ESS)

If you want to..	then..
Review and process a team member's leave request	Click *My Inbox*. See: Reviewing and processing a leave request
Create a leave request on behalf of a team member (including viewing a team member's leave balances and leave request history)	In the *Employee Services* tab, click *My Leave Requests.* See: Creating a leave request on behalf of a team member
Approve PASS overtime, PASS standby or paid-on-claim hours	Click *My Inbox*. See: Approving PASS overtime, PASS standby and paid-on-claim hours
Add a substitute manager to process leave requests on your behalf	Click *My Inbox*. See: Adding a planned manager substitution Adding an unplanned manager substitution
accept or activate an unplanned manager substitution	Click *My Inbox*. See: Accepting (activating) an unplanned manager substitution
stop or deactivate an unplanned manager substitution	Click *My Inbox*. See: Stopping (deactivating) an unplanned manager substitution
review your substitutions to others or substitutions from others to you	Click *My Inbox*. See: Reviewing all manager substitutions
delete an existing manager substitution	Click *My Inbox*. See: Deleting a manager substitution

Reviewing and processing a leave request

Background

The HR website outlines the types of leave available to UCT staff members, how each leave type accrues and the circumstances under which the leave may be taken.

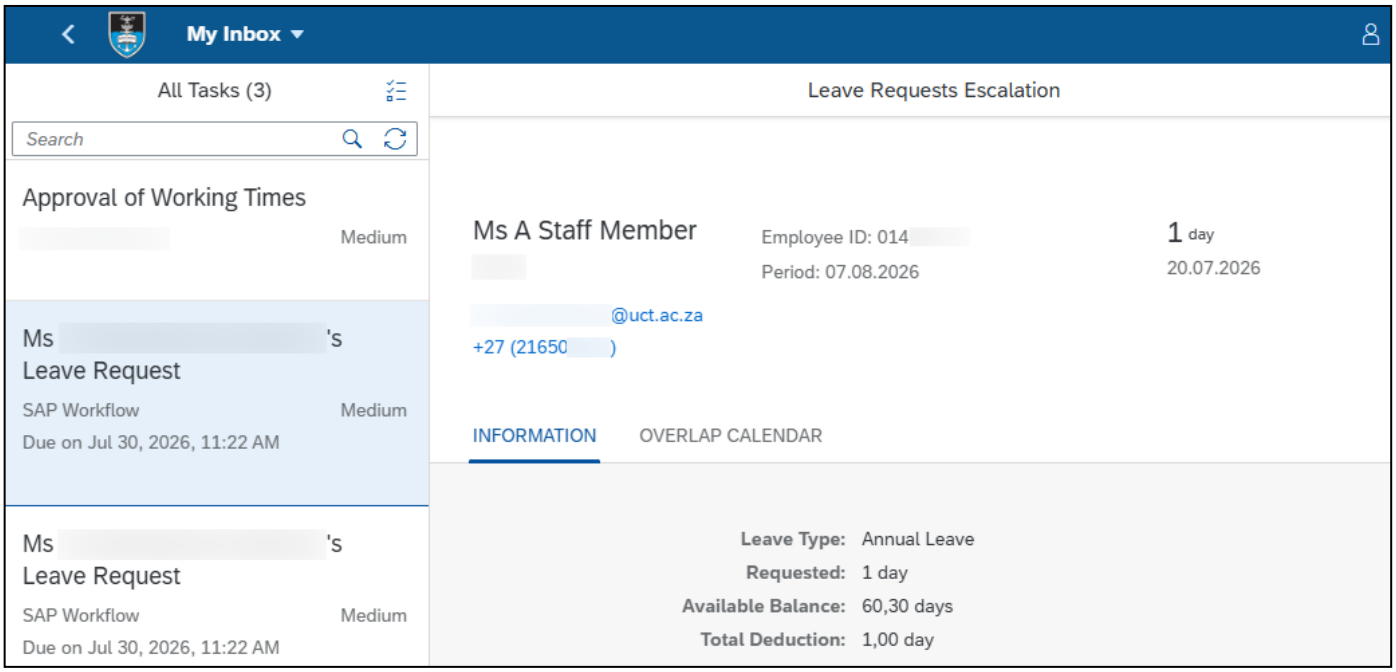
Staff category	Leave information
PASS staff	Leave policy (including annual, sick, parental and family responsibility leave) Study and examination leave Leave FAQ (Frequently Asked Questions)
Academic staff	Leave policy (including sick, parental and family responsibility leave) Leave FAQ (Frequently Asked Questions) Study & research and contact leave

Escalation of leave requests

Leave requests that are not approved within 10 calendar days will be escalated to the next level of management for approval.

Procedure

1. After logging in to HR Employee Self-Service, click *My Inbox*.
2. The *My Inbox* page appears, displaying any pending leave requests. If there are approvals of working time/s in the *Inbox*, see Approving PASS overtime, PASS standby and paid-on-claim hours.

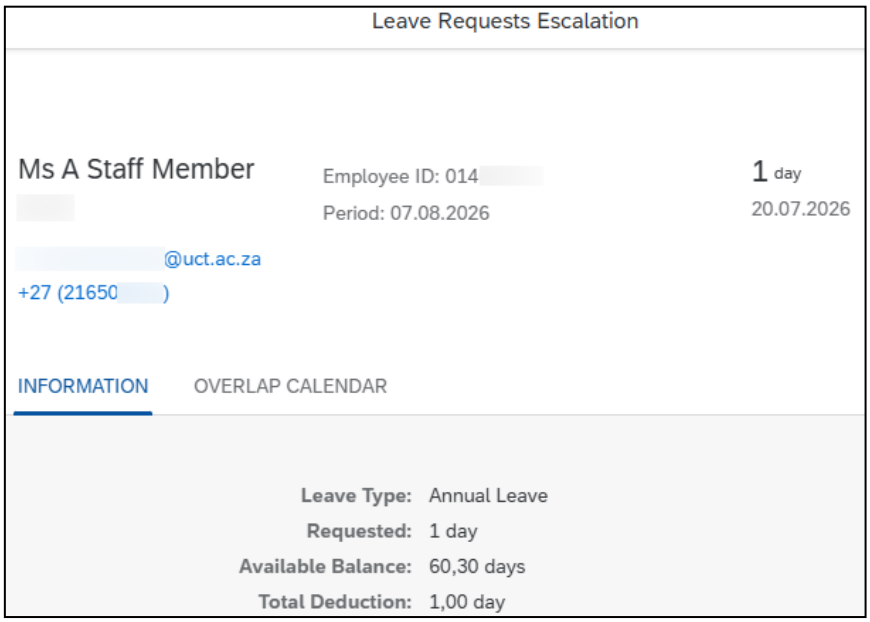


- Select the appropriate leave request on the left. The current leave request is indicated by blue shading.

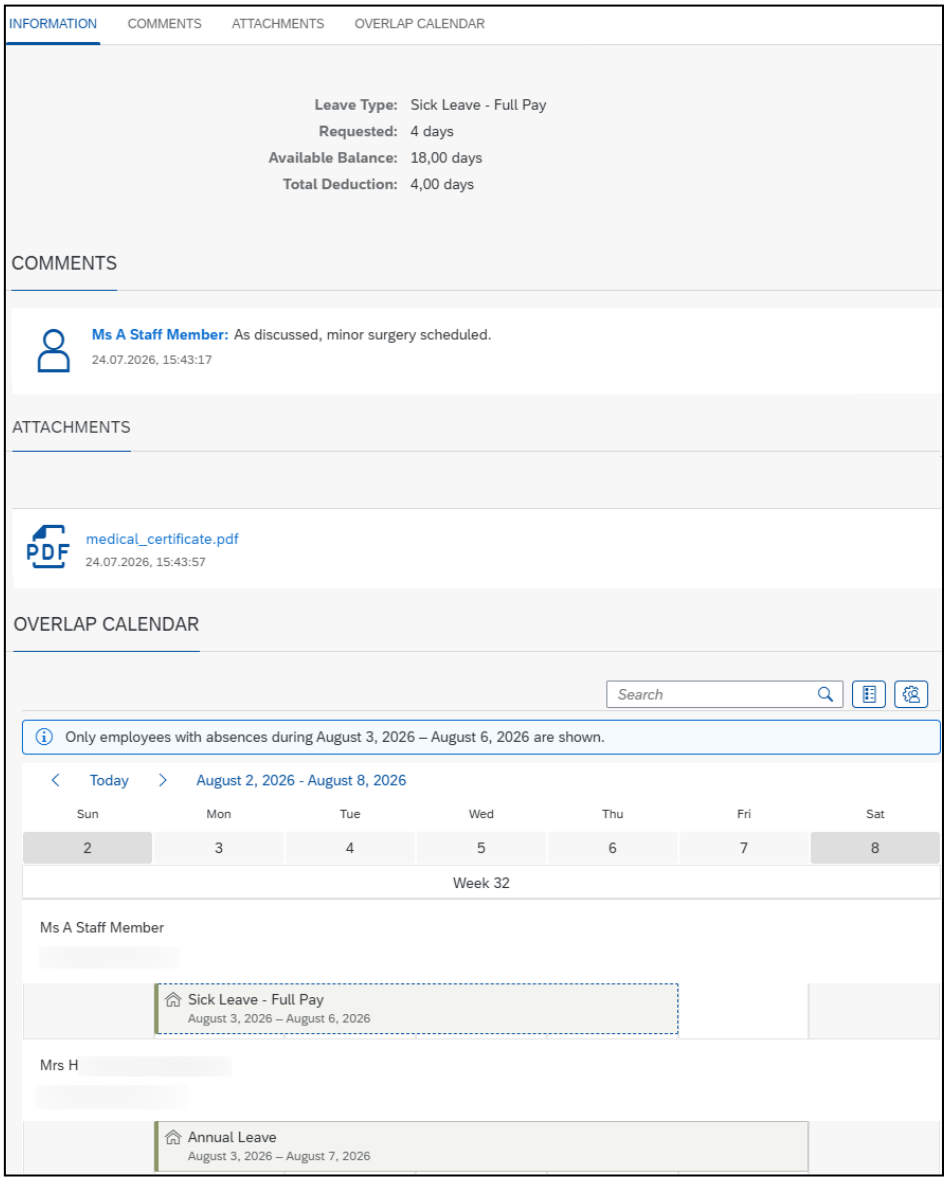
  Note: Leave requests that aren't processed by the *Due on* date will be escalated to the next level of management.

Reviewing and processing a leave request

- Details of the selected leave request appear on the right, including the staff member's *Available Balance*.

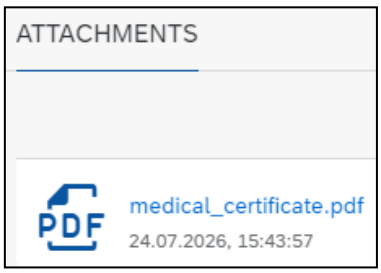


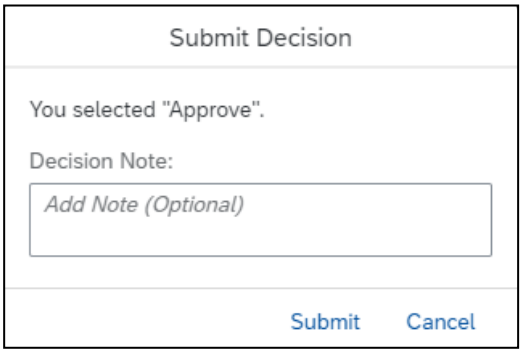
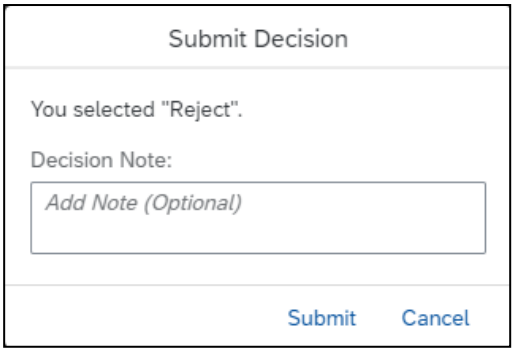
- If the leave request has comments, attachments or leave request overlaps, the applicable section/s appear below the *INFORMATION* section.



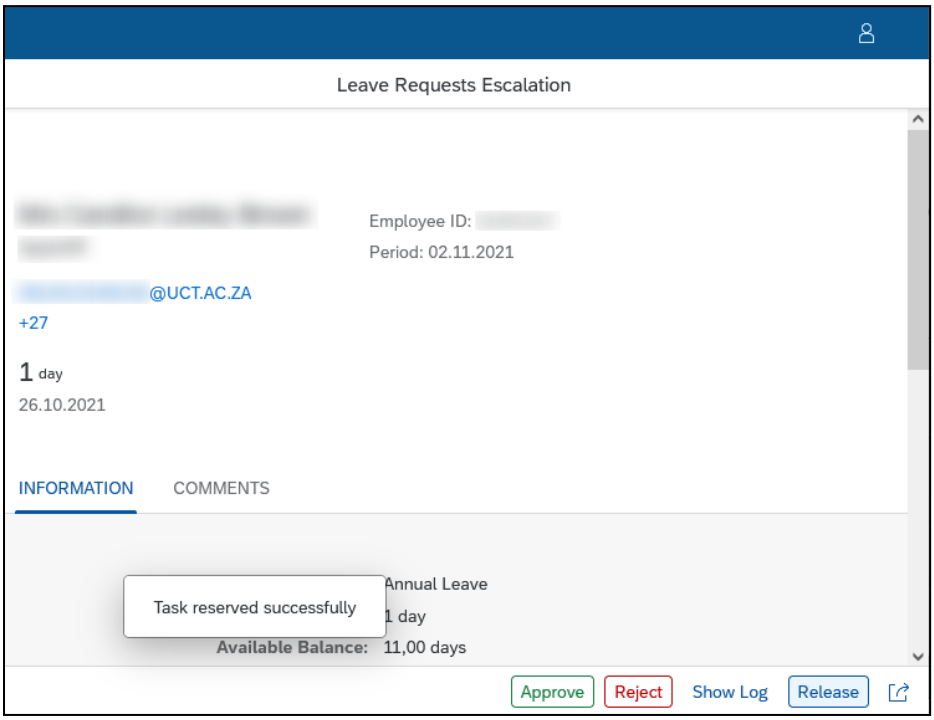
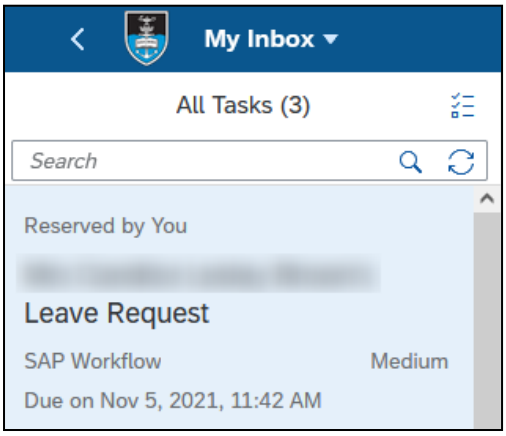
Reviewing and processing a leave request

- Review the leave request details.
- If there are attachments, click the blue hyperlinked text in the *ATTACHMENTS* section to open and view the attachment.



If you want to..	Then..
approve a leave request	– Click Approve. – The *Submit Decision* dialogue box appears.  – If applicable, enter a note for the staff member in the *Decision Note* field. – Click *Submit*. – The approved leave request is removed from the inbox and a message at the bottom of the page indicates that the task was processed successfully.
reject a leave request	– Click Reject. – The *Submit Decision* dialogue box appears.  – If applicable, enter a note for the staff member in the *Decision Note* field. – Click *Submit*. – The rejected leave request is removed from the inbox and a message at the bottom of the page indicates that the task was processed successfully.

Reviewing and processing a leave request

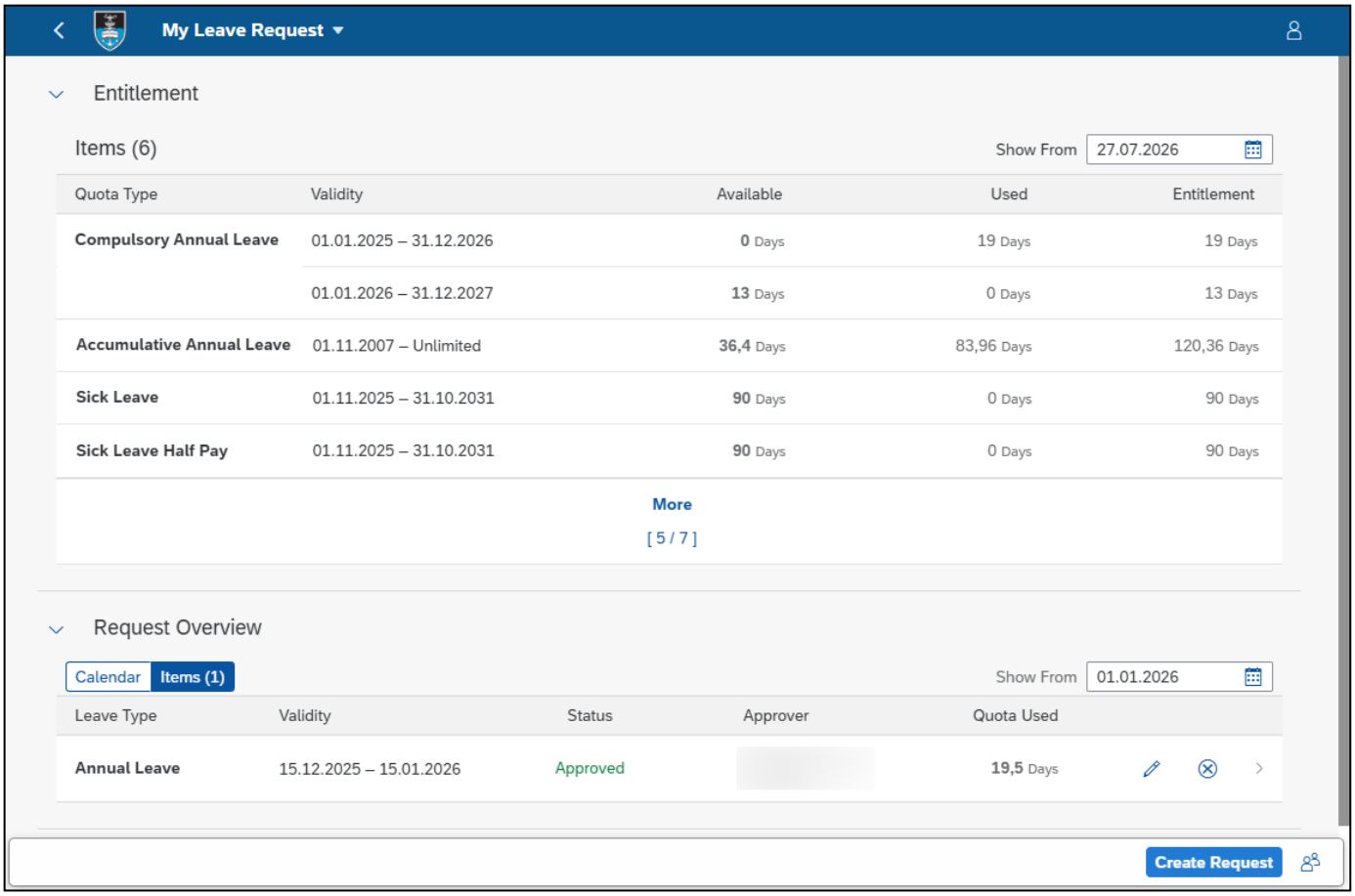
If you want to..	Then..
claim or release a leave request (only used with unplanned manager substitution)	If you have accepted (activated) an unplanned manager substitution, leave requests from that manager's team members will appear in both manager inboxes. The claim feature reserves a leave request and it will only appear in your inbox. The release feature removes the claim and the leave request will appear in both manager inboxes. – Click *Claim*.  – A message briefly appears at the bottom of the page to confirm the task was reserved successfully. – On the left, the *Reserved by You* message appears above the staff member's name.  – The leave request now only appears in your inbox. – To release a claim and return the leave request to all inboxes, click *Release*. A message briefly appears at the bottom of the page to confirm the task was released successfully.

– Click the UCT crest to return to the *Home* page.

Creating a leave request on behalf of a team member

Procedure

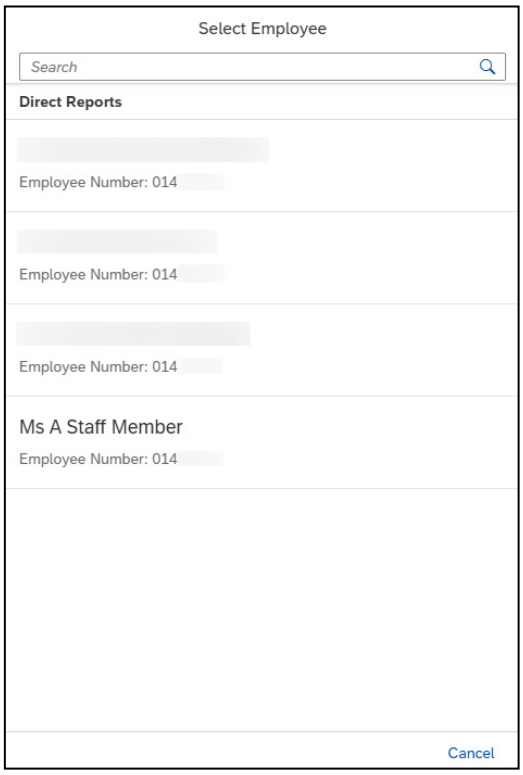
1. After logging in to HR Employee Self-Service, click *My Leave Requests* (in the *Employee Services* section).
2. The *My Leave Request* page appears, displaying your leave information.



- To act on behalf of a team member that reports to you, click *Act on behalf of another employee* (bottom right, next to *Create Request* button).

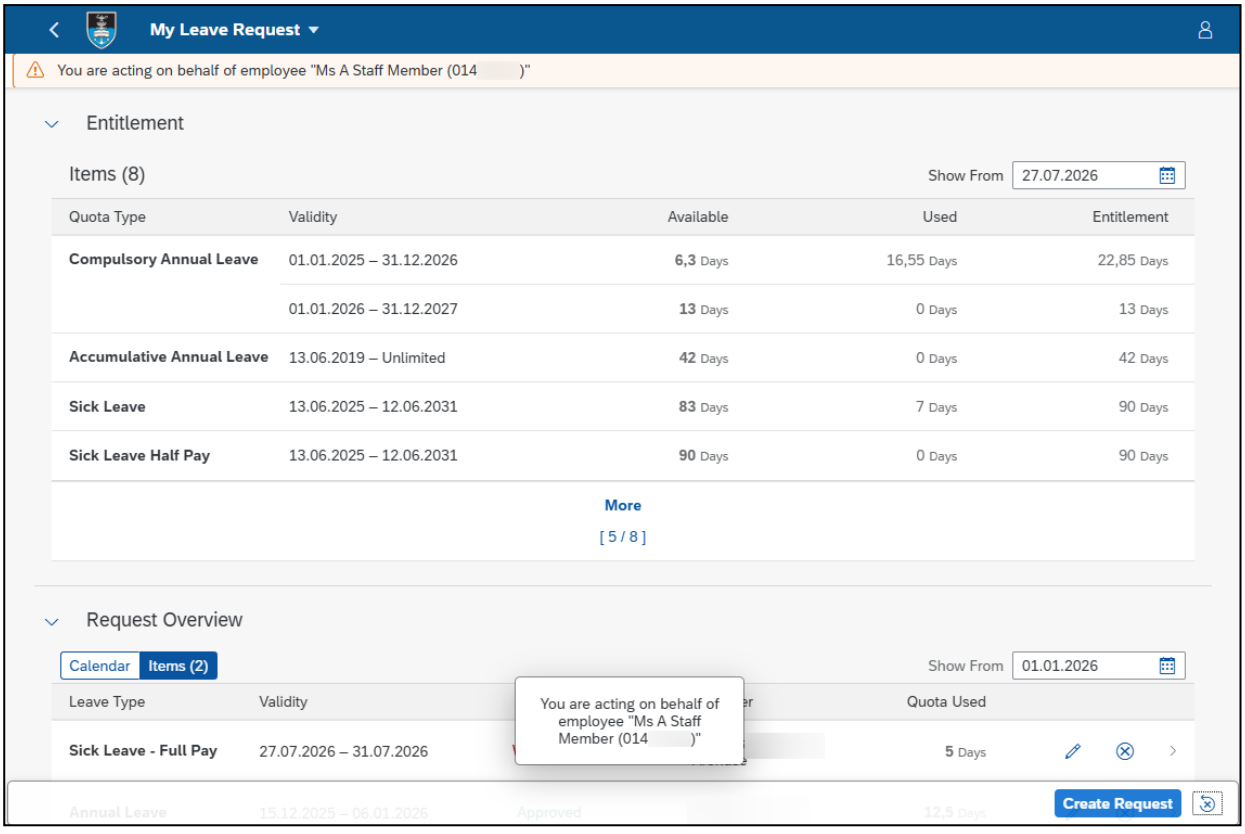
Creating a leave request on behalf of a team member

- The *Select Employee* dialogue box appears, listing all direct reports.
  Note: Only team members that report directly to the manager are available to select.



- Select the appropriate team member.

3. The *My Leave Request* page reappears. The orange line at the top of the page indicates which team member you are acting on behalf of. A message briefly appears at the bottom of the page to confirm the selected team member.



- View leave balances, create leave requests, change leave requests or delete leave requests using the instructions in the HR Employee Self-Service (ESS) guide.

Creating a leave request on behalf of a team member

- When finished working with the team member's leave, click *Act as Yourself* (bottom right, next to *Create Request* button).

4. The *My Leave Request* page reappears, displaying your leave information. A message briefly appears at the bottom of the page to confirm you are acting for your own employee number.

- Click the UCT crest to return to the *Home* page.

Approving PASS overtime, PASS standby and paid-on-claim hours

Background

PASS overtime and standby

PASS staff who worked overtime or standby hours can record these on Employee Self-Service (ESS). The captured hours are submitted to the staff member's manager for approval.
Note: Time off in lieu of overtime must be submitted as a leave request using the leave type *Time Off in Lieu Overtime*.

Paid-on-claim hours

Some departments have Time Administrators who capture paid-on-claim hours worked. These hours will also appear in ESS for the manager to approve.

Pay run deadline

Paid hours approved by the end of the 15th of the month will be included in the pay run.

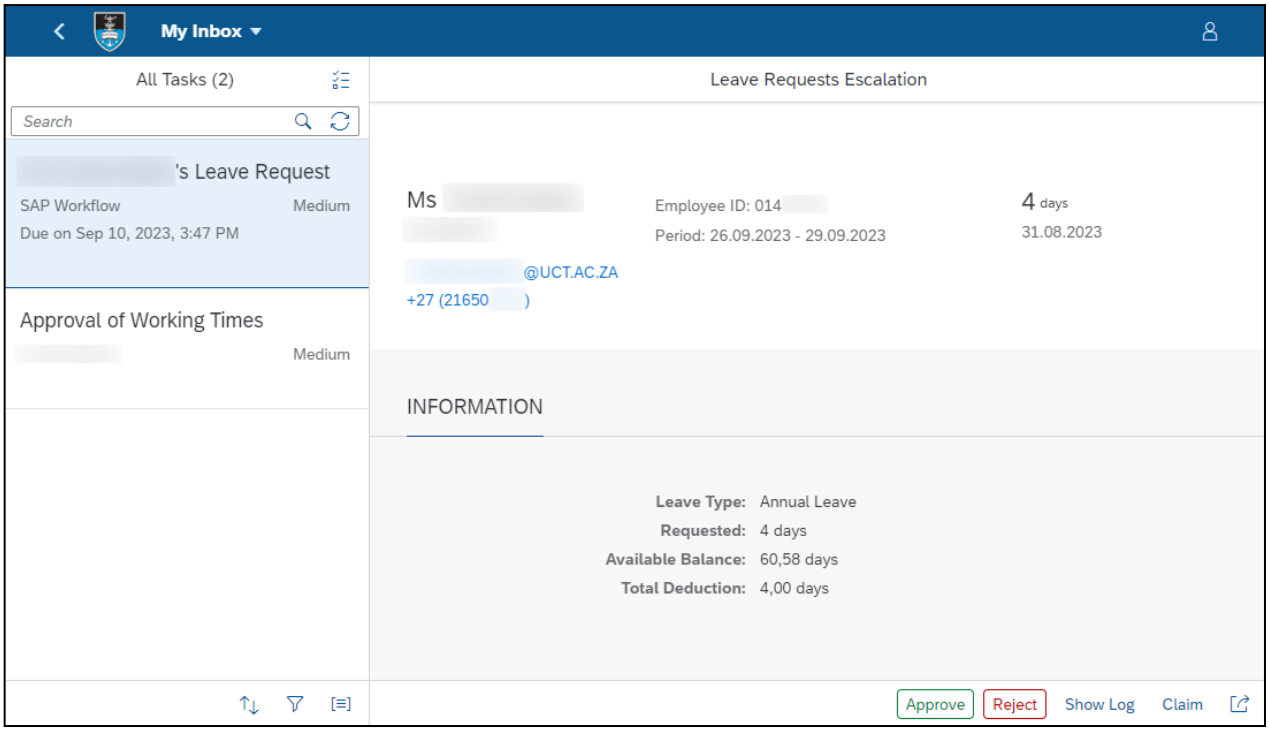
Maximums

PASS overtime	PASS standby	Paid-on-claim hours worked
3 hours per working day 10 hours per non-working day 10 hours total per week	24 hours per day	12 hours per day 60 hours total per week

See: PASS overtime policy and guidelines on the HR website.

Procedure

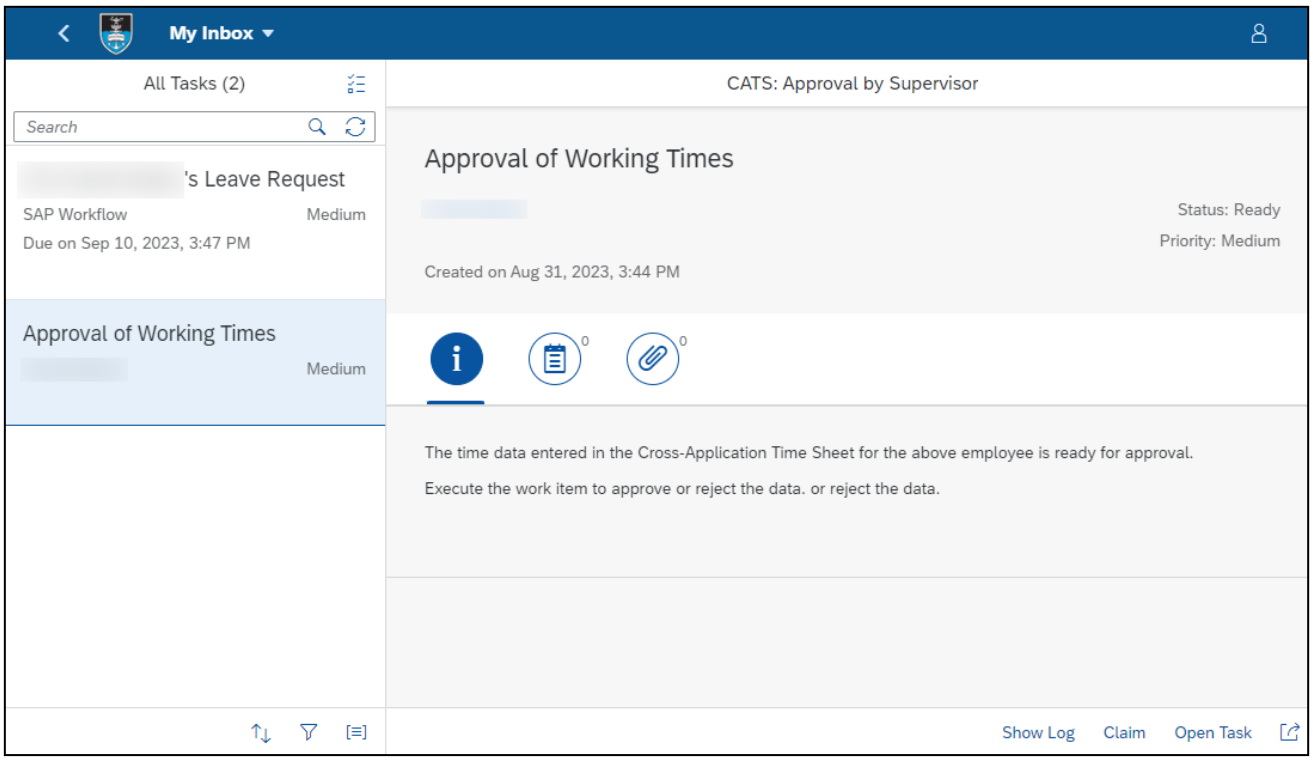
1. After logging in to HR Employee Self-Service, click *My Inbox* (in the *Manager Services* section).
2. The *My Inbox* page appears displaying working time approvals. If there is a leave request, see: Reviewing and processing a leave request.



- Select the *Approval of Working Times* task on the left.

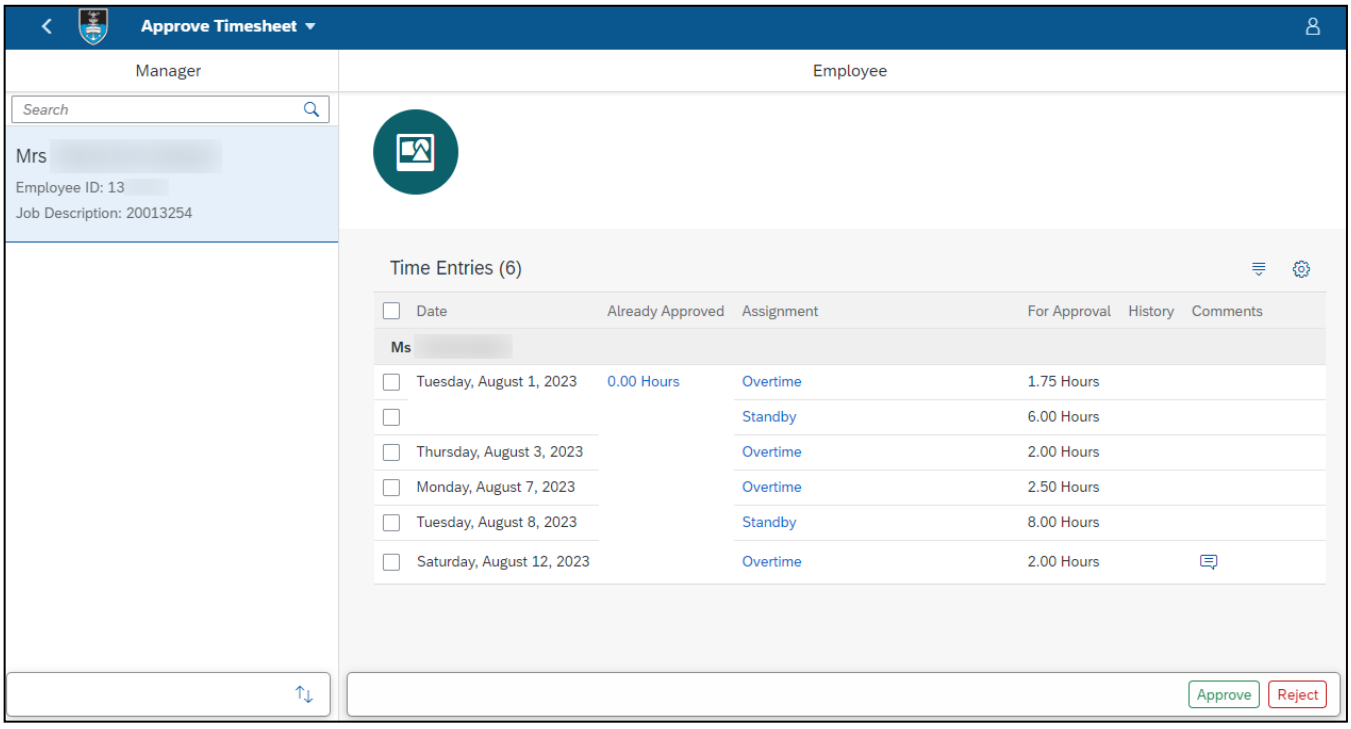
Approving PASS overtime, PASS standby and paid-on-claim hours

- Details of the selected approval appear on the right.



- Click *Open Task* (bottom right).

3. The *Approve Timesheet* page opens in a new browser tab.



- The hours for approval are grouped by employee with the type of hours (e.g. Overtime, Standby) shown in the *Assignment* column. Paid-on-claim hours will show as *No assignment*. Hours submitted for the same day will appear together with the date on the first line.

Approving PASS overtime, PASS standby and paid-on-claim hours

- If applicable, click *Comments* in the *Comments* column to read a comment from the staff member.
- To change the displayed columns, click *Table Settings for Time Entries*.
- Select hours to approve or reject using the checkboxes on the left or click the top checkbox next to the *Date* column to select all hours.

Date	Already Approved	Assignment	For Approval	History	Comments
Ms					
Tuesday, August 1, 2023	0.00 Hours	Overtime	1.75 Hours		
		Standby	6.00 Hours		
Thursday, August 3, 2023		Overtime	2.00 Hours		
Monday, August 7, 2023		Overtime	2.50 Hours		
Tuesday, August 8, 2023		Standby	8.00 Hours		
Saturday, August 12, 2023		Overtime	2.00 Hours		

- Approve or reject the hours by following the steps below:

Approving hours

- Click Approve.
- A message at the bottom of the page confirms that the time entries were successfully approved.

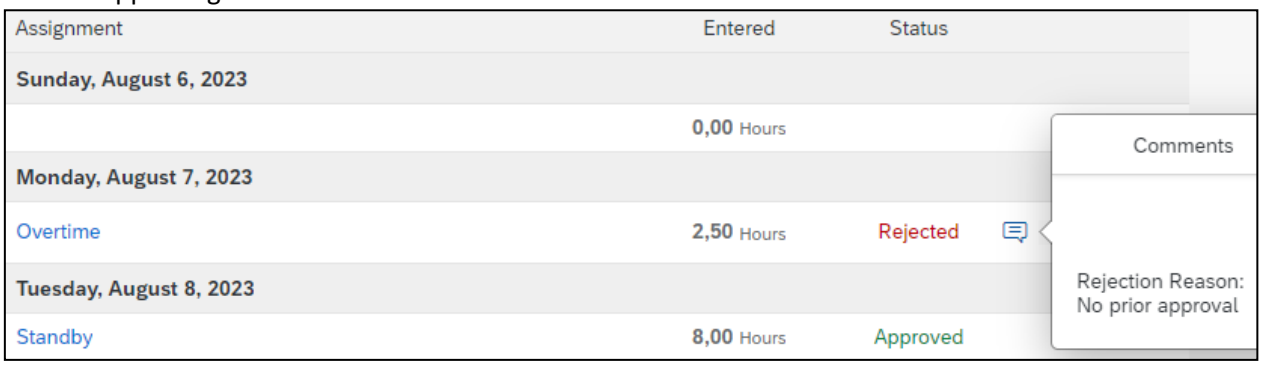
Rejecting hours

- Click Reject.
- The *Reject* dialogue box appears.

- Select the appropriate rejection reason.
  Note: If changing to time off in lieu, the staff member must complete a leave request on ESS for *Time off in Lieu Overtime*.
- Click Reject.
- A message at the bottom of the page confirms that the time entries were successfully rejected.

Approving PASS overtime, PASS standby and paid-on-claim hours

- If the staff member views the hours in *My Timesheet* they will see approvals and rejections, with rejection reasons appearing as comments.



- Close the *Approve Timesheet* tab in your browser to return to your *Inbox*.
- Click the UCT crest to return to the *Home* page.

Adding a planned manager substitution

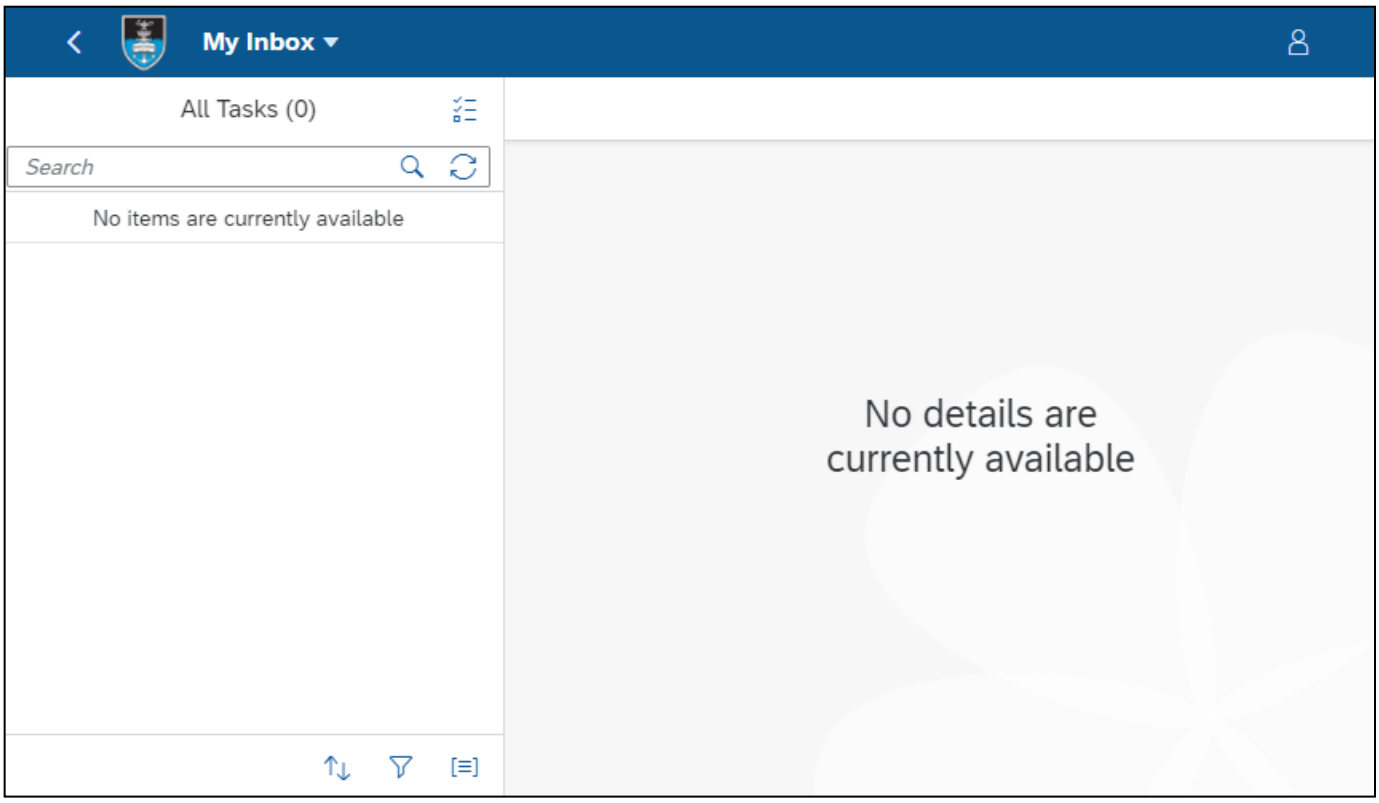
Background

A planned substitution can be set for a period or continuously with no end date. All pending leave requests in the inbox will move to the selected manager on the start date of the substitution. It is recommended that you process all existing leave requests before a substitution becomes active. Any leave requests submitted during the substitution period will go to the substitute manager and will not appear in your inbox.

See also: Adding an unplanned manager substitution.

Procedure

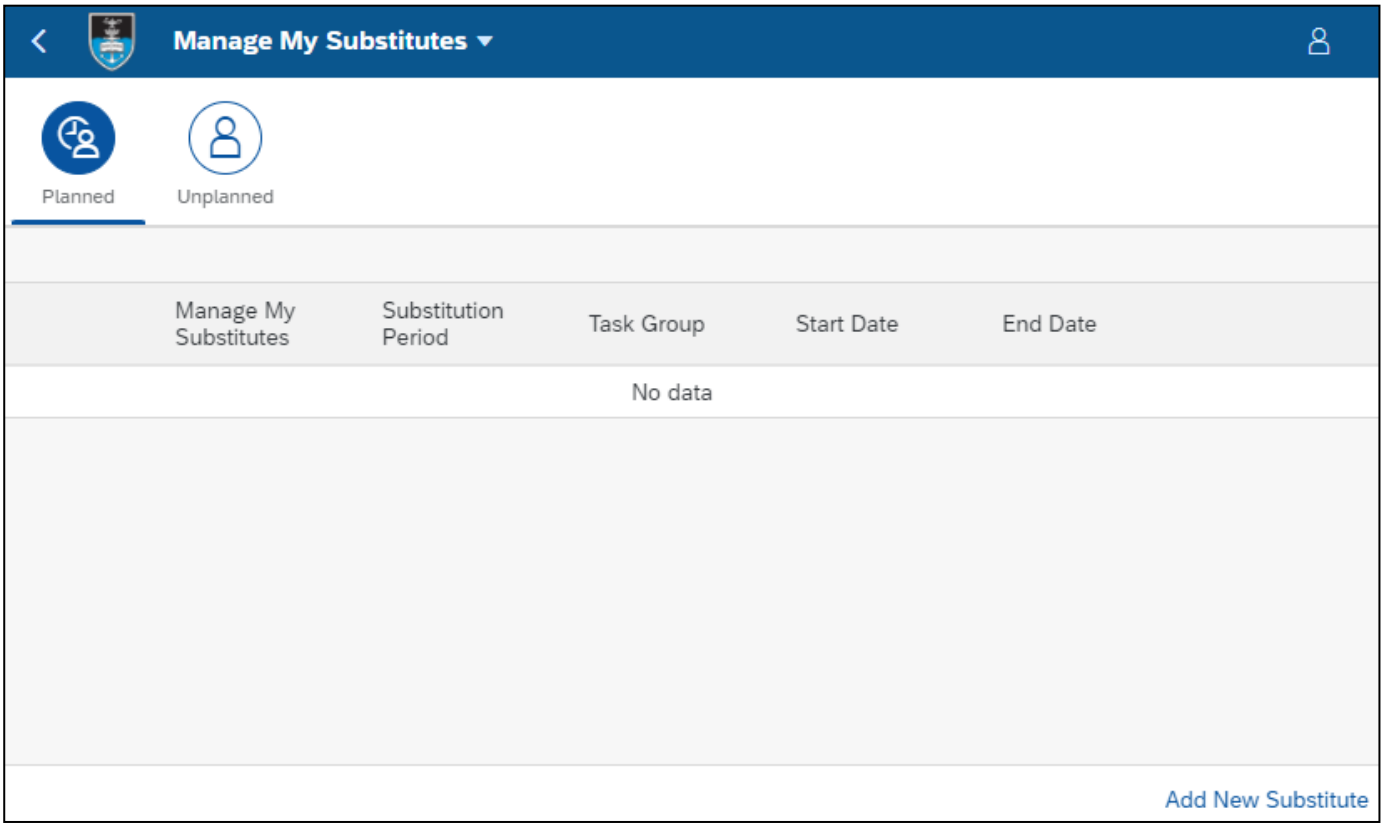
1. After logging in to HR Employee Self-Service, click *My Inbox* (in the *Manager Services* section).
2. The *My Inbox* page appears. If applicable, any pending leave requests will be listed.



- Click (top right) and choose Manage My Substitutes.

Adding a planned manager substitution

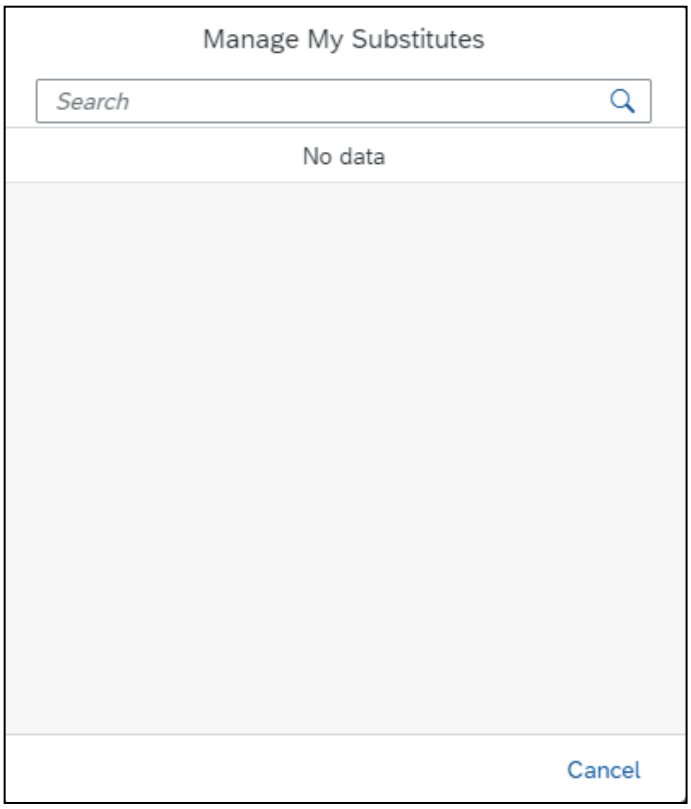
3. The *Manage My Substitutes* page appears.



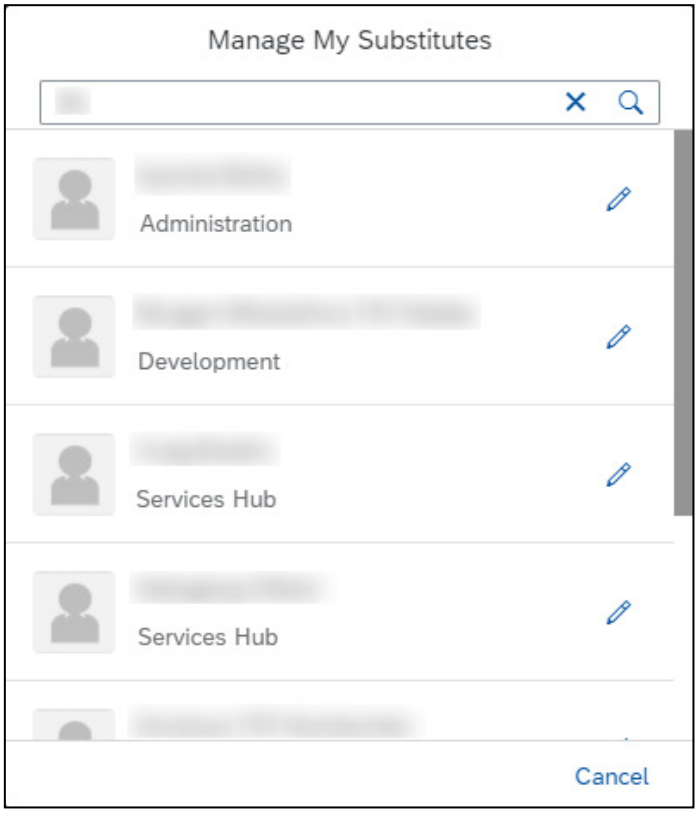
- Ensure Planned is selected.
- Click *Add New Substitute* (bottom right).

Adding a planned manager substitution

4. The *Manage My Substitutes* dialogue box appears.



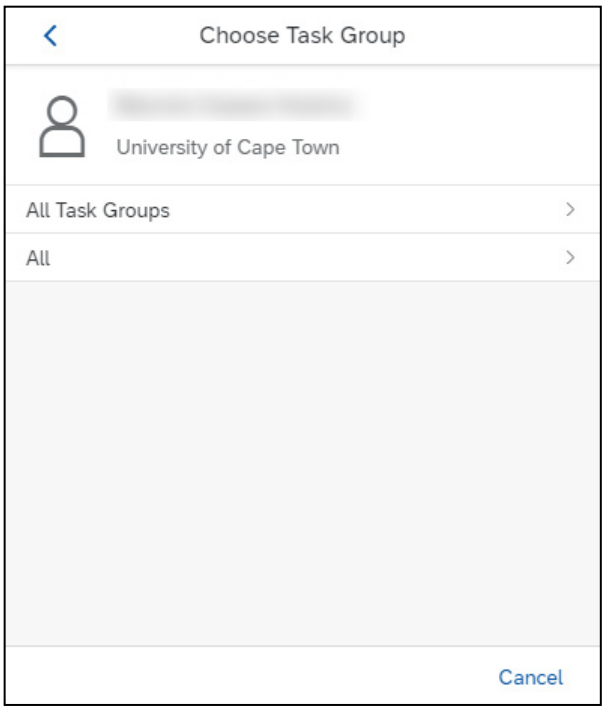
- Enter the manager's first name, last name or staff number in the *Search* field.
  Note: Only a staff member who is already a manager with the appropriate access can be selected as a substitute.
- Click *Search*.
- Any staff members who match the search criteria are listed.



- Select the appropriate staff member by clicking their line.

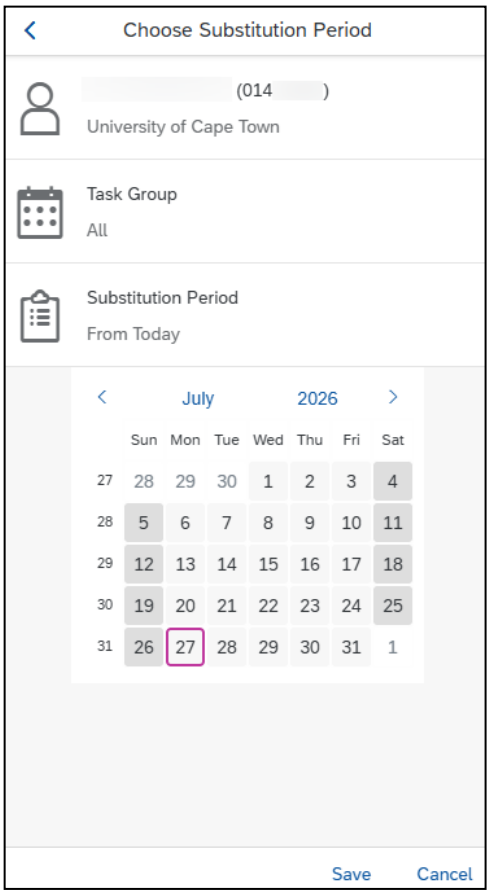
Adding a planned manager substitution

5. The *Choose Task Group* dialogue box appears.



   - Click *All*.

6. The *Choose Substitution Period* dialogue box appears.



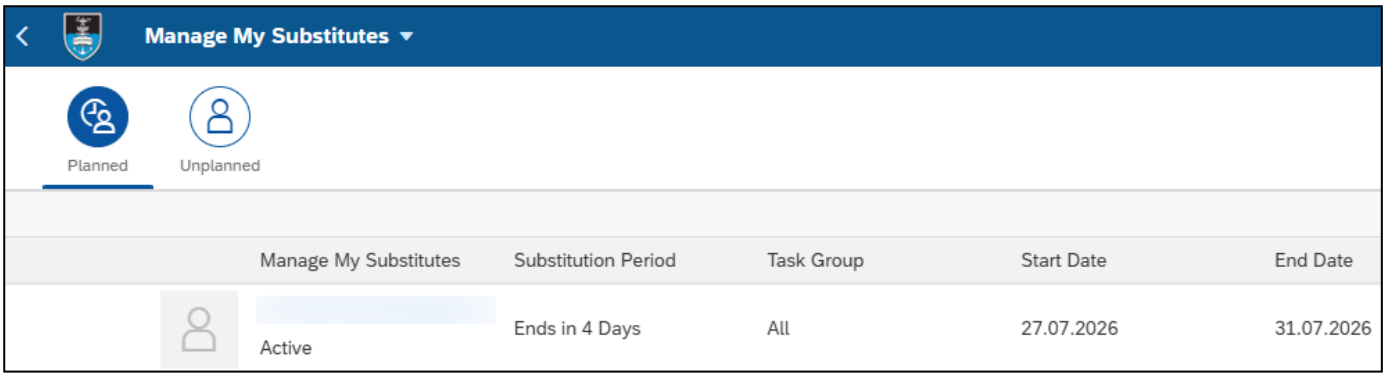
   - Select the start date from the calendar.
   - If applicable, select the substitution end date on the calendar. If an end date is not selected, the substitution will be ongoing without no end date.
   - Click *Save*.

Adding a planned manager substitution

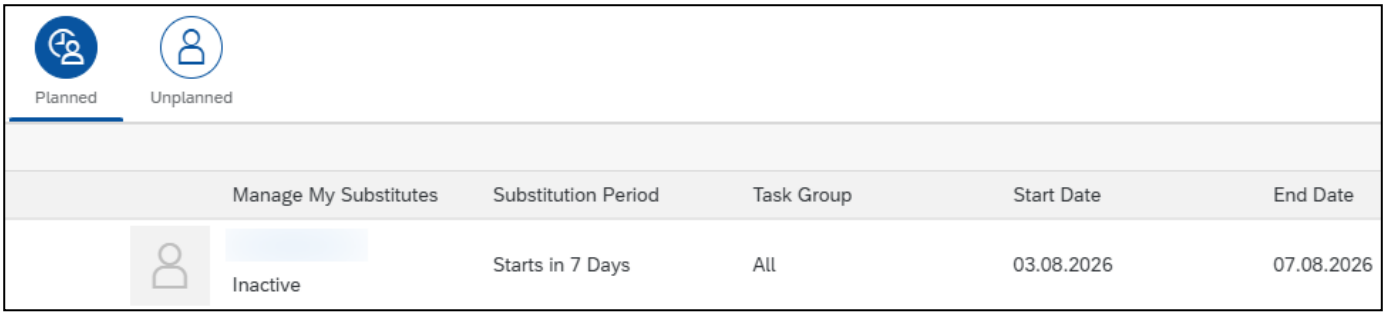
7. The *Manage My Substitutes* page reappears, displaying the new substitution. A message briefly appears at the bottom of the page to confirm the substitution rule was created. All pending leave requests in the inbox will move to the selected manager on the start date of the substitution

   Note: If you have an unplanned substitution to the same manager, it will automatically adjust according to the end date selected for the planned substitution. If the planned substitution is ongoing, the unplanned substitution to the same manager will be deleted.

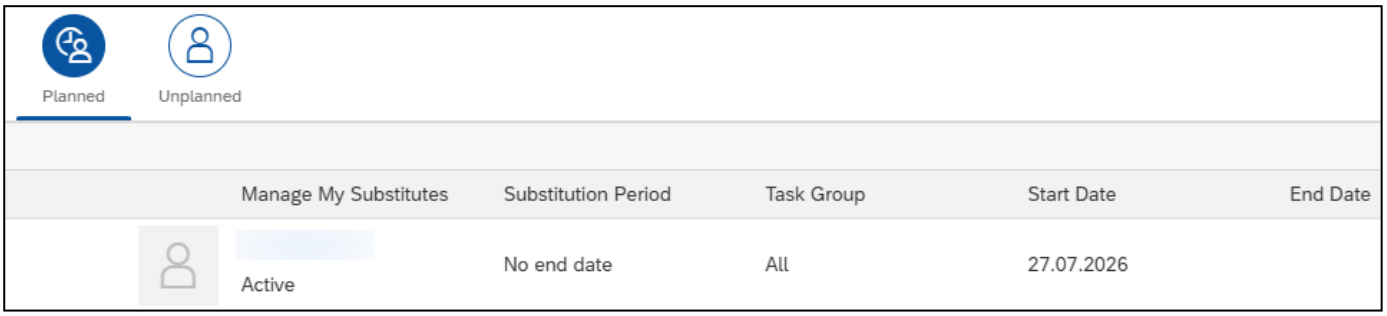
   Example: Planned substitution from today until an end date.



   Example: Future planned substitution with start and end date specified.

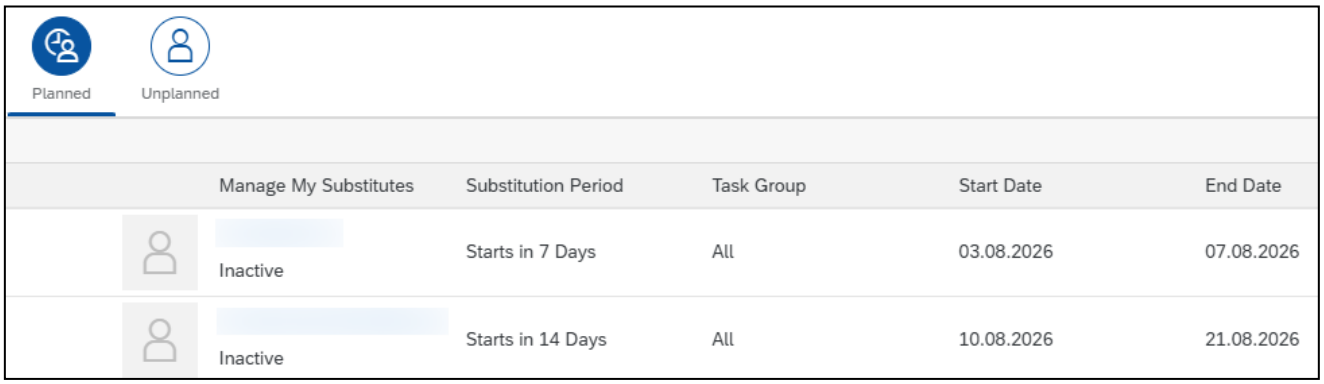


   Example: Planned substitution from today with no end date.



Adding a planned manager substitution

- To create another planned substitution, repeat from step 3 above. This can be used to add multiple substitute managers to cover a longer absence.



- Ensure that the manager is informed of the planned substitution. Any leave requests from your team members will automatically appear in their inbox from the start of the planned substitution.
- Click the UCT crest to return to the *Home* page.

Adding an unplanned manager substitution

Background

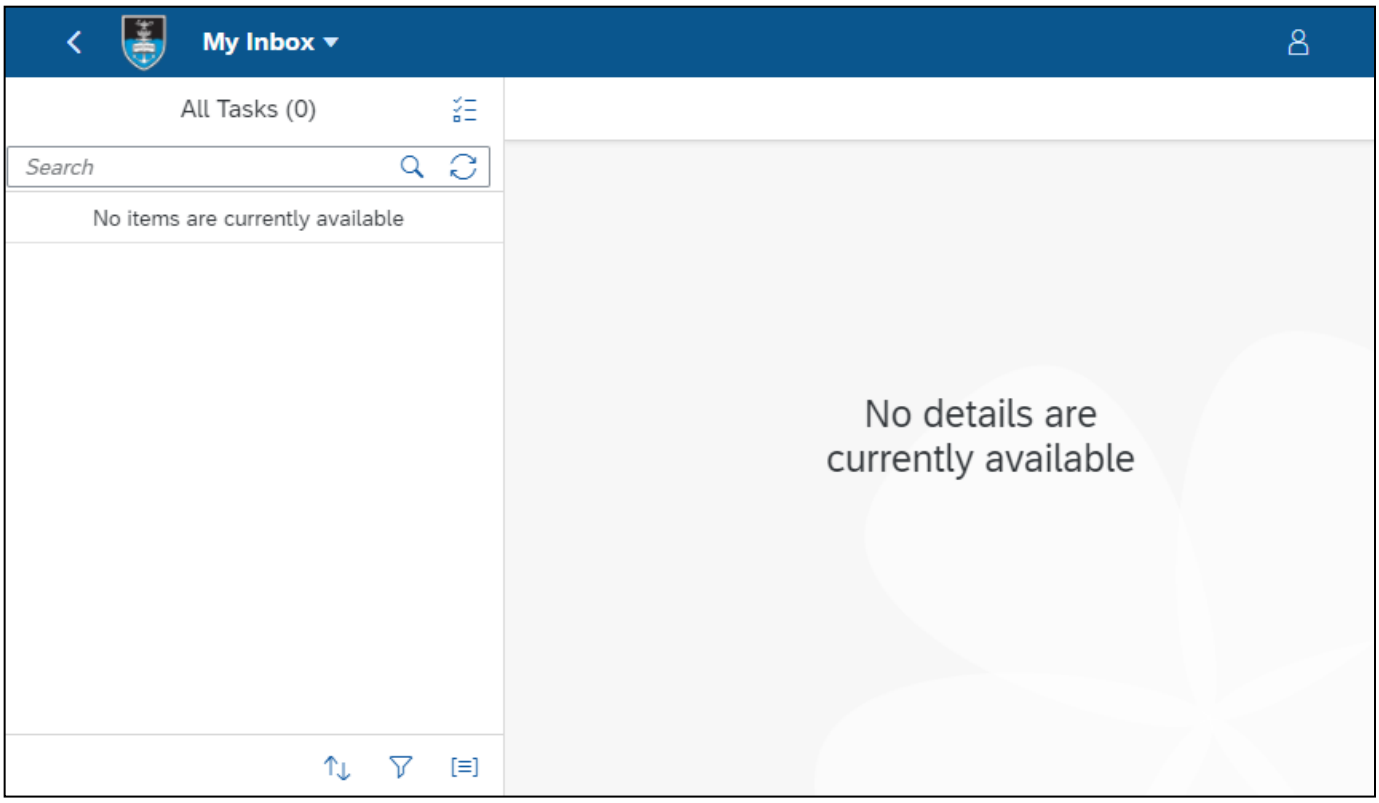
Unplanned manager substitutions can be set up ahead of time, allowing the substituted manager to use the feature when required (e.g. you are unexpectedly ill and unable to add a substitution).

An unplanned manager substitution is set from today onwards with no end date. The substituted manager must accept/activate the unplanned substitution to make it active. All pending and future leave requests will appear in both managers' inboxes while the unplanned substitution is active.

See also: Adding a planned manager substitution.

Procedure

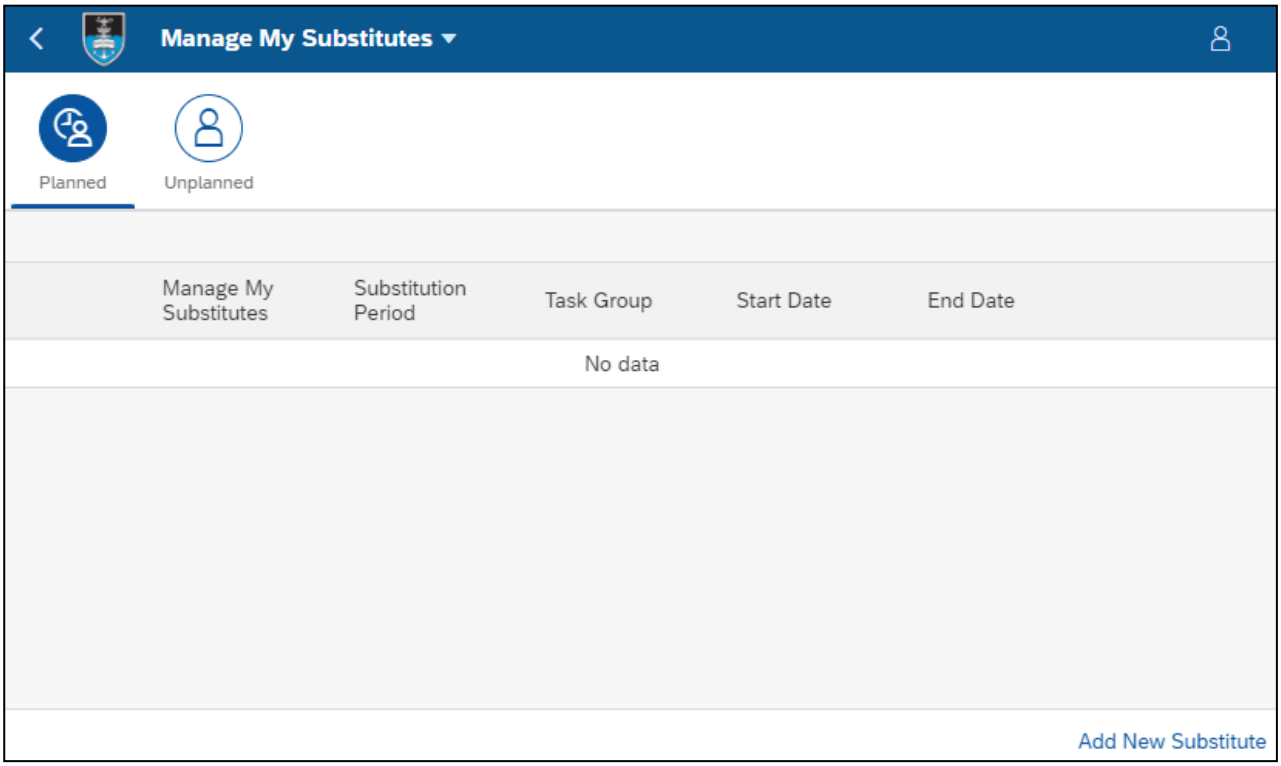
1. After logging in to HR Employee Self-Service, click *My Inbox* (in the *Manager Services* section).
2. The *My Inbox* page appears. If applicable, any pending leave requests will be listed.



- Click (top right) and choose Manage My Substitutes.

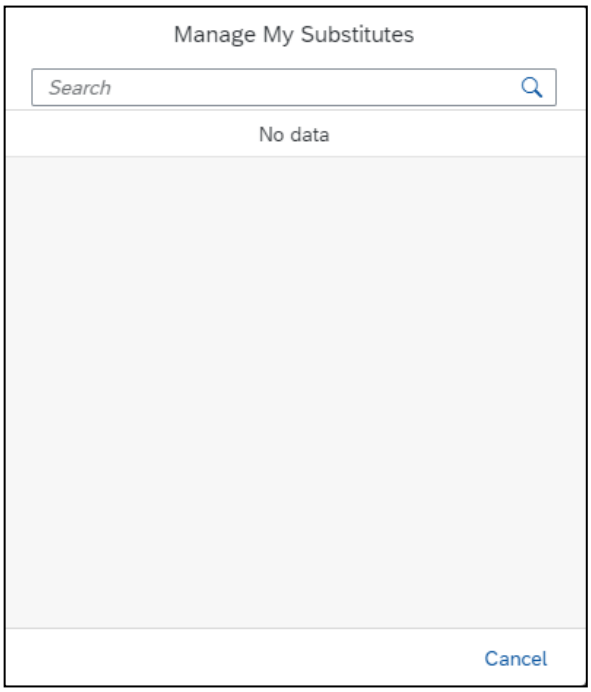
Adding an unplanned manager substitution

3. The *Manage My Substitutes* page appears.



- Click Unplanned.
- Click *Add New Substitute* (bottom right).

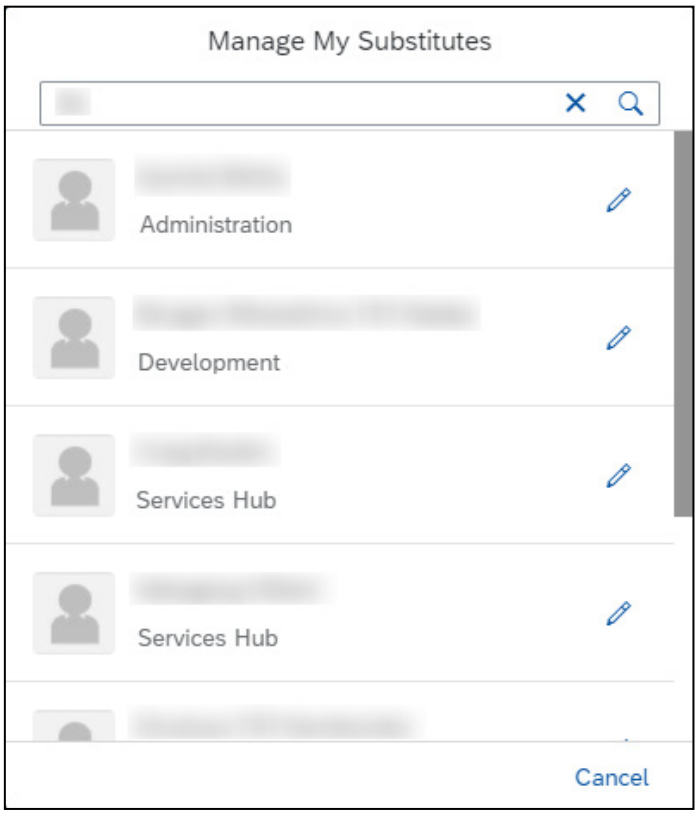
4. The *Manage My Substitutes* dialogue box appears.



- Enter the manager's first name, last name or staff number in the *Search* field.
  Note: Only a staff member who is already a manager with the appropriate access can be selected as a substitute.
- Click *Search*.

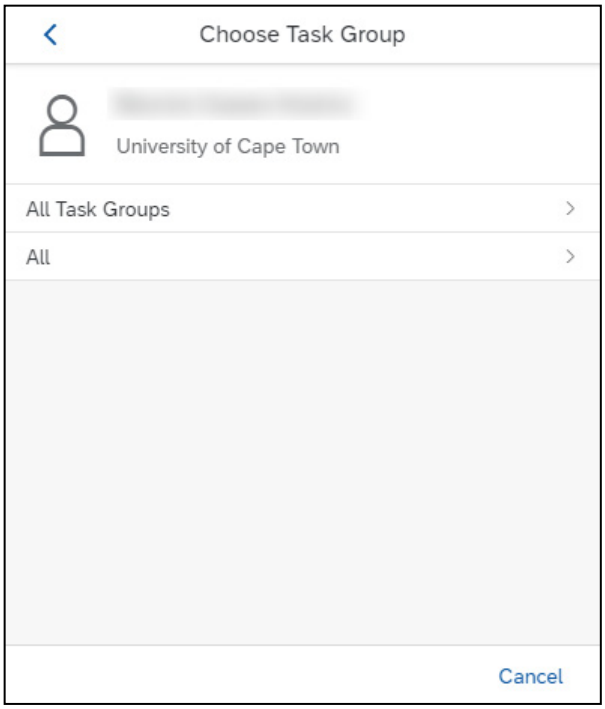
Adding an unplanned manager substitution

- Any staff members who match the search criteria are listed.



- Select the appropriate staff member by clicking their line.

5. The *Choose Task Group* dialogue box appears.

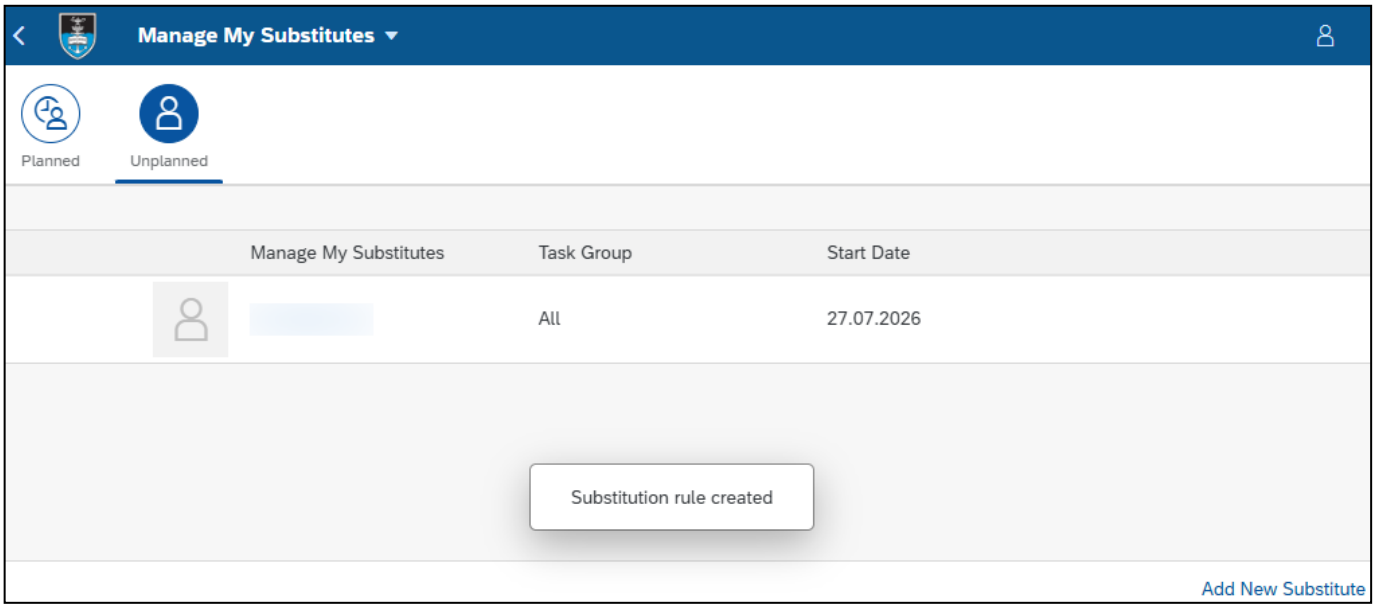


- Click *All*.
- Click *Save* (button appears after selecting *All*).

Adding an unplanned manager substitution

6. The *Manage My Substitutes* page reappears, displaying the new substitution. A message briefly appears at the bottom of the page to confirm the substitution rule was created.

   Note: If you have a planned substitution to the same manager, it will be deleted and replaced by the new unplanned manager substitution. The planned substitution can be recreated but the dates will determine which substitutions are active or deleted.



- To create another unplanned substitution, repeat from step 3 above.
- The substitute manager must accept (activate) the unplanned substitution when required. No leave requests will be sent to the substitute manager's inbox without this step.
- Click the UCT crest to return to the *Home* page.

Accepting (activating) an unplanned manager substitution

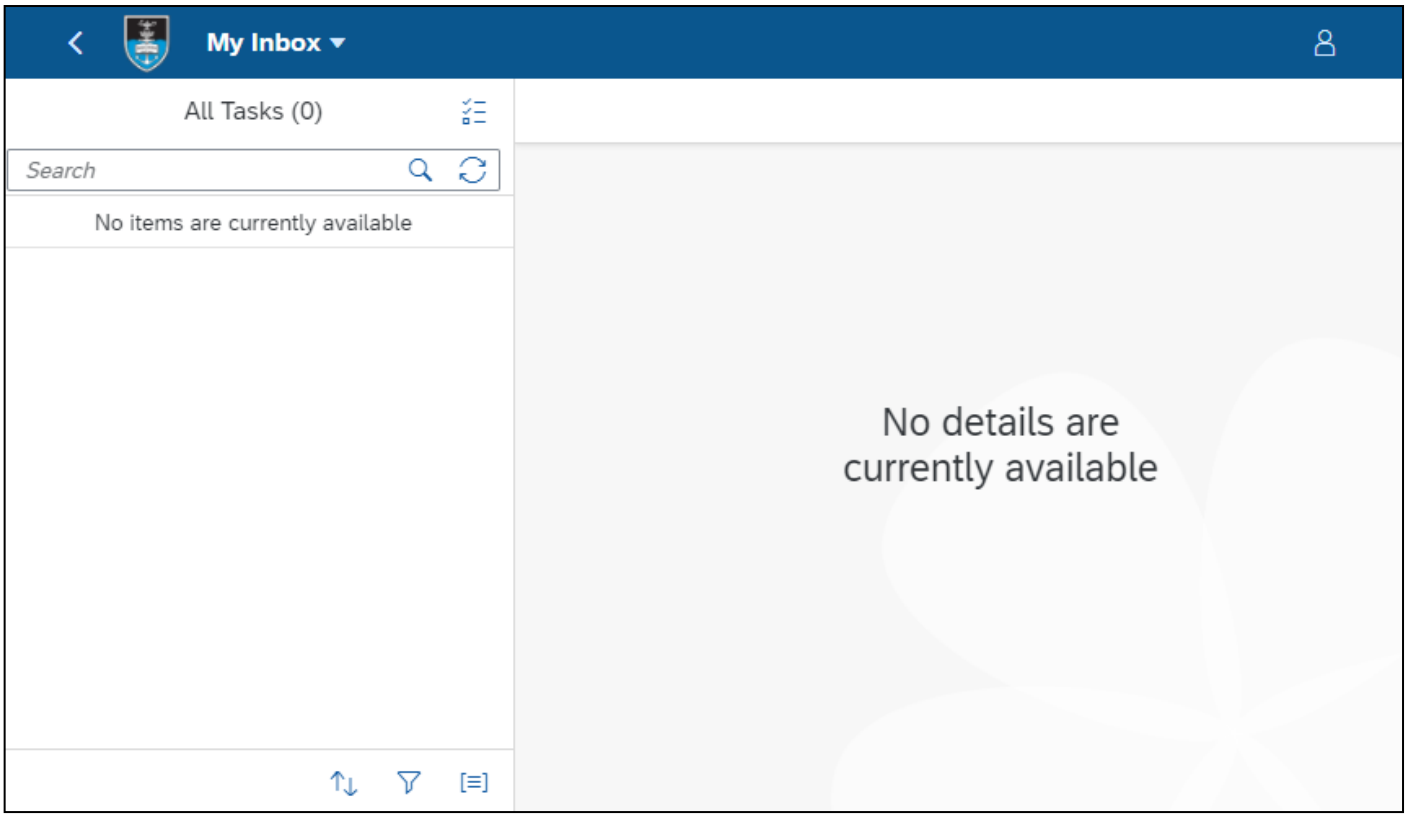
Background

The substituted manager must accept (activate) the unplanned substitution to make it active. All pending and future leave requests will appear in both managers' inboxes while the unplanned substitution is active. An unplanned substitution can be stopped (deactivated) until required again.

See also: Adding an unplanned manager substitution.

Procedure

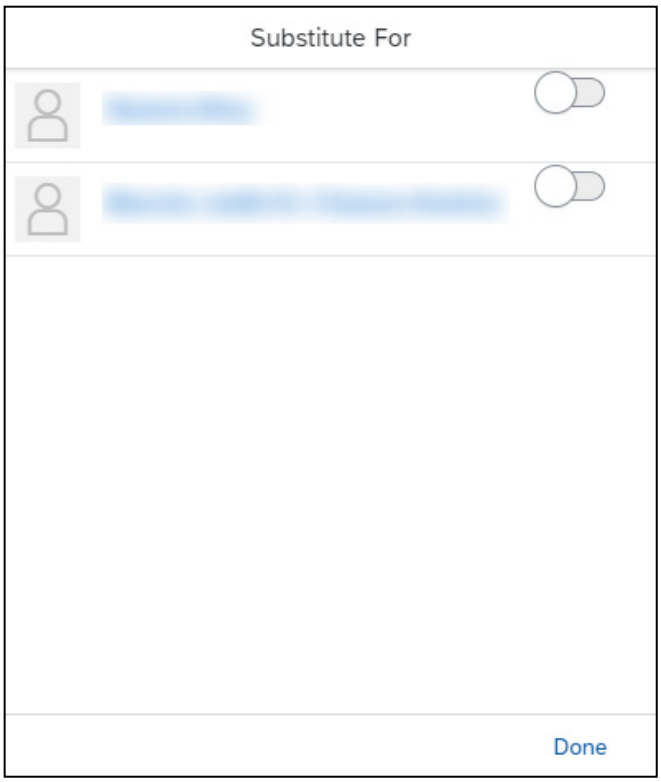
1. After logging in to HR Employee Self-Service, click *My Inbox* (in the *Manager Services* section).
2. The *My Inbox* page appears. If applicable, any pending leave requests will be listed.



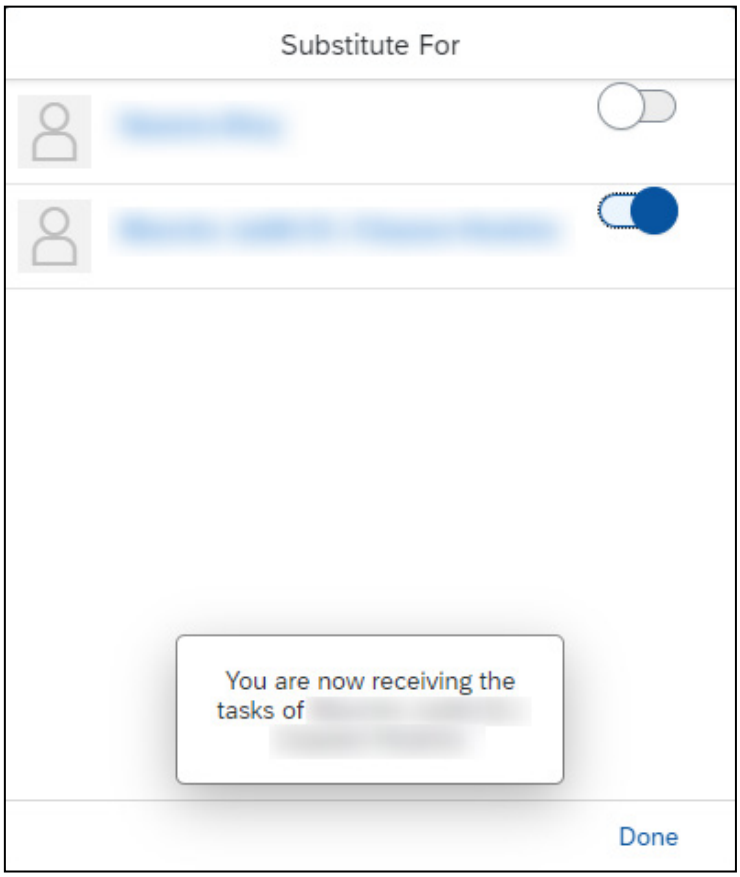
- Click (top right) and choose Substitute For.

Accepting (activating) an unplanned manager substitution

3. The *Substitute For* dialogue box appears, displaying any available unplanned substitutions.



- Use the button to accept (activate) an unplanned substitution. A message briefly appears at the bottom of the page to confirm you are now receiving tasks for the selected manager.



- Click *Done* to return to the *My Inbox* page.
- Click the UCT crest to return to the *Home* page.

Stopping (deactivating) an unplanned manager substitution

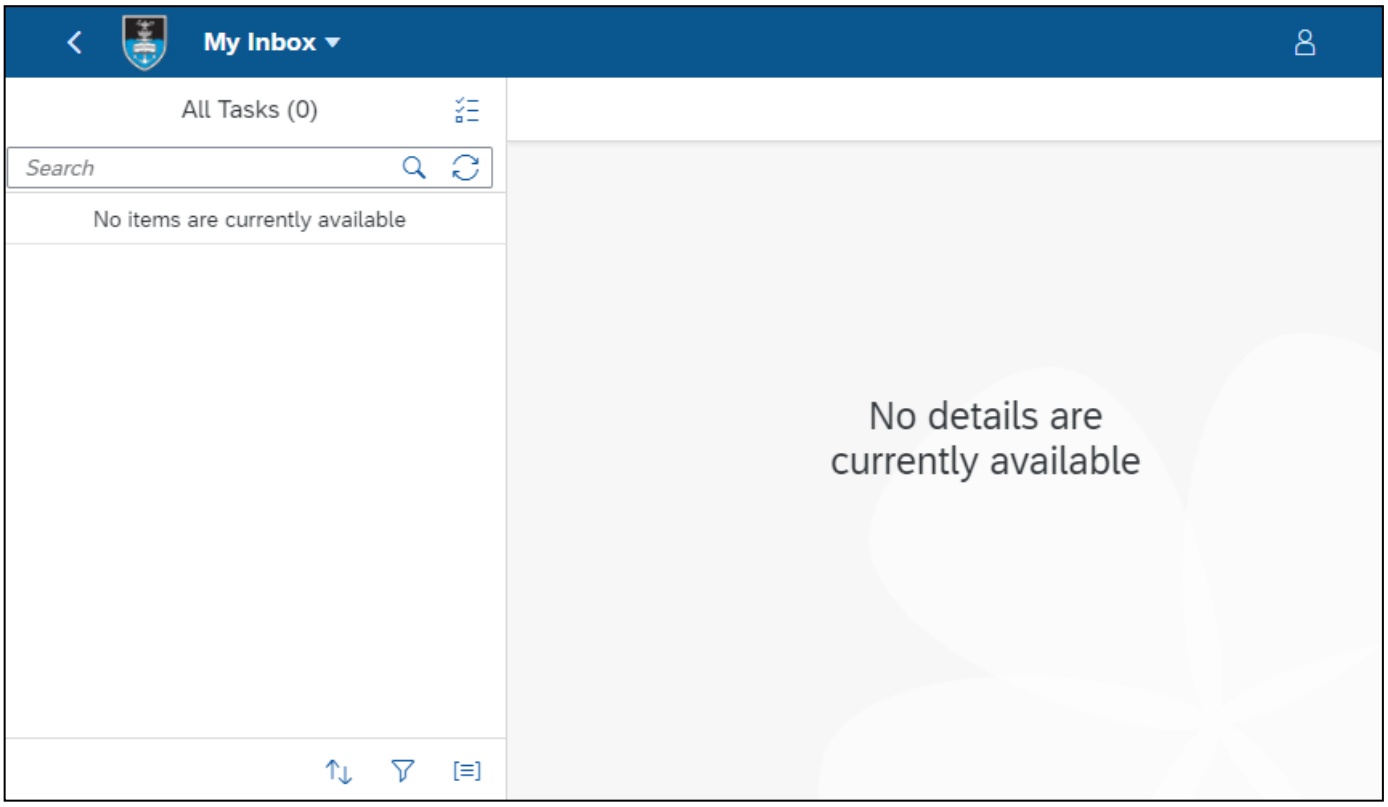
Background

An unplanned manager substitution can be stopped (deactivated) until required again. This procedure is completed by the substitute manager.

If the unplanned manager substitution should be deleted, see: Deleting a manager substitution.

Procedure

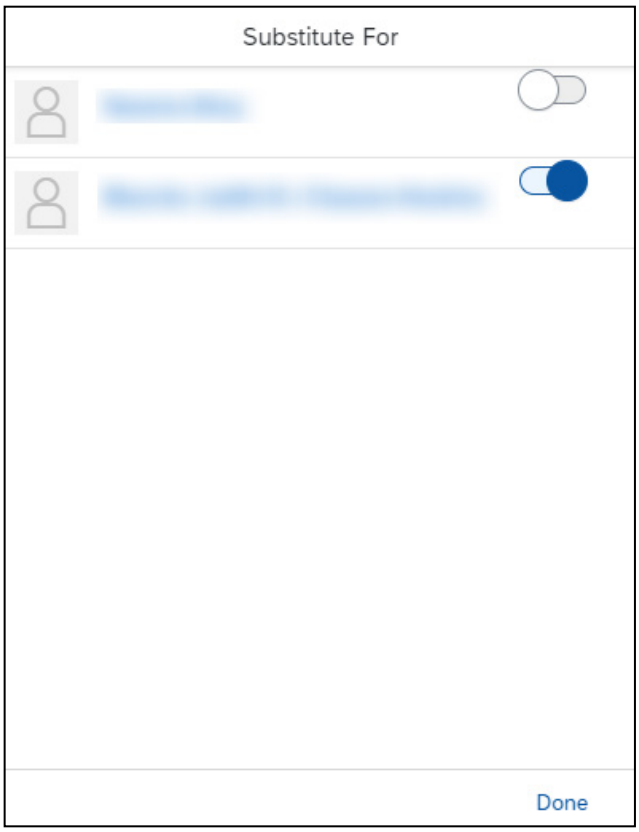
1. After logging in to HR Employee Self-Service, click *My Inbox* (in the *Manager Services* section).
2. The *My Inbox* page appears. If applicable, any pending leave requests will be listed.



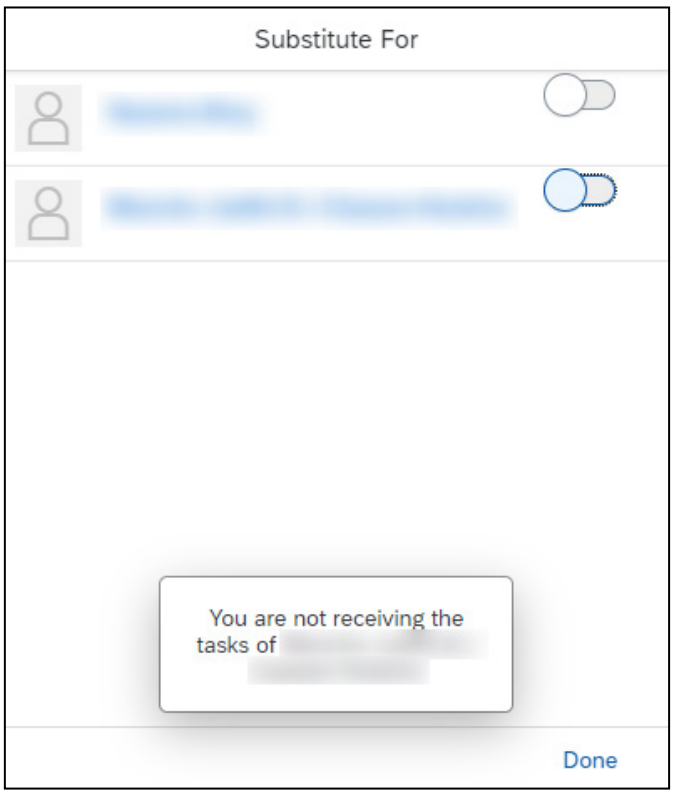
- Click (top right) and choose Substitute For.

Stopping (deactivating) an unplanned manager substitution

3. The *Substitute For* dialogue box appears.



- Use the button to stop (deactivate) an unplanned substitution. A message briefly appears at the bottom of the page to confirm you are not receiving tasks for the selected manager. Any pending leave requests will be removed from the substitute manager's inbox.

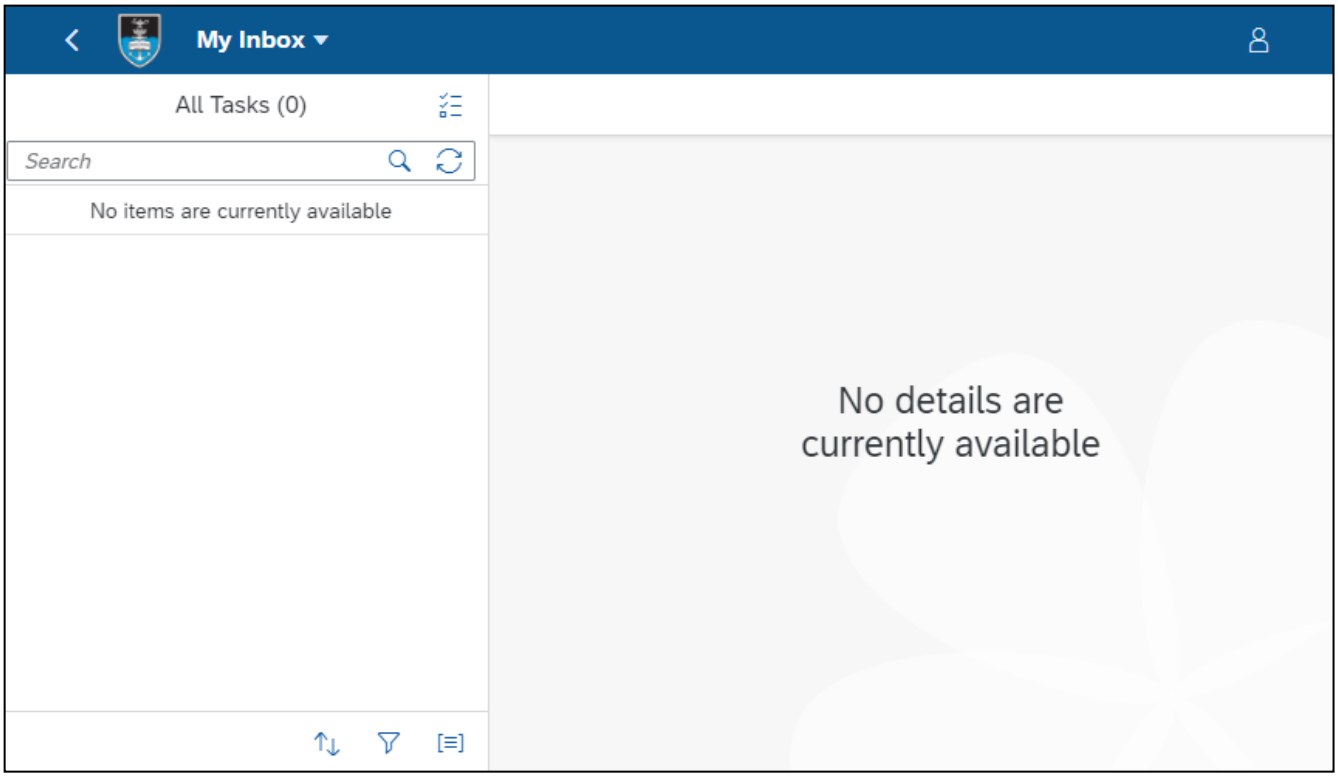


- Click *Done* to return to the *My Inbox* page.
- Click the UCT crest to return to the *Home* page.

Reviewing all manager substitutions

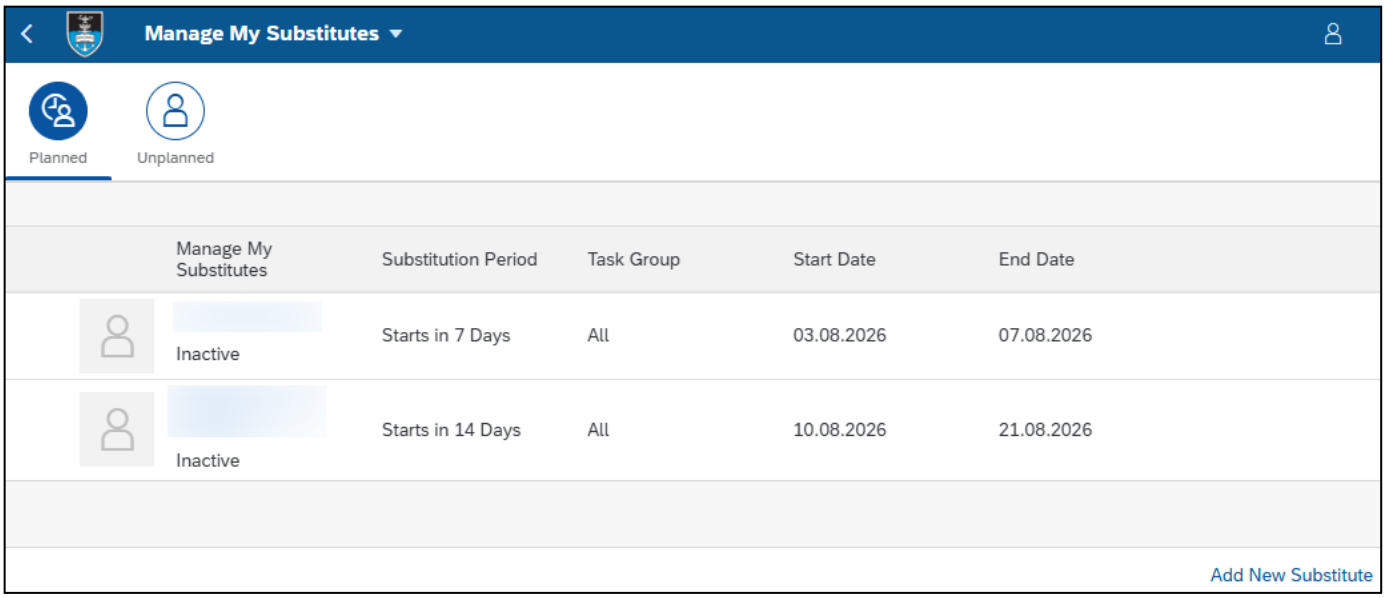
Procedure

1. After logging in to HR Employee Self-Service, click *My Inbox* (in the *Manager Services* section).
2. The *My Inbox* page appears. If applicable, any pending leave requests will be listed.



   - Click (top right) and choose Manage My Substitutes.

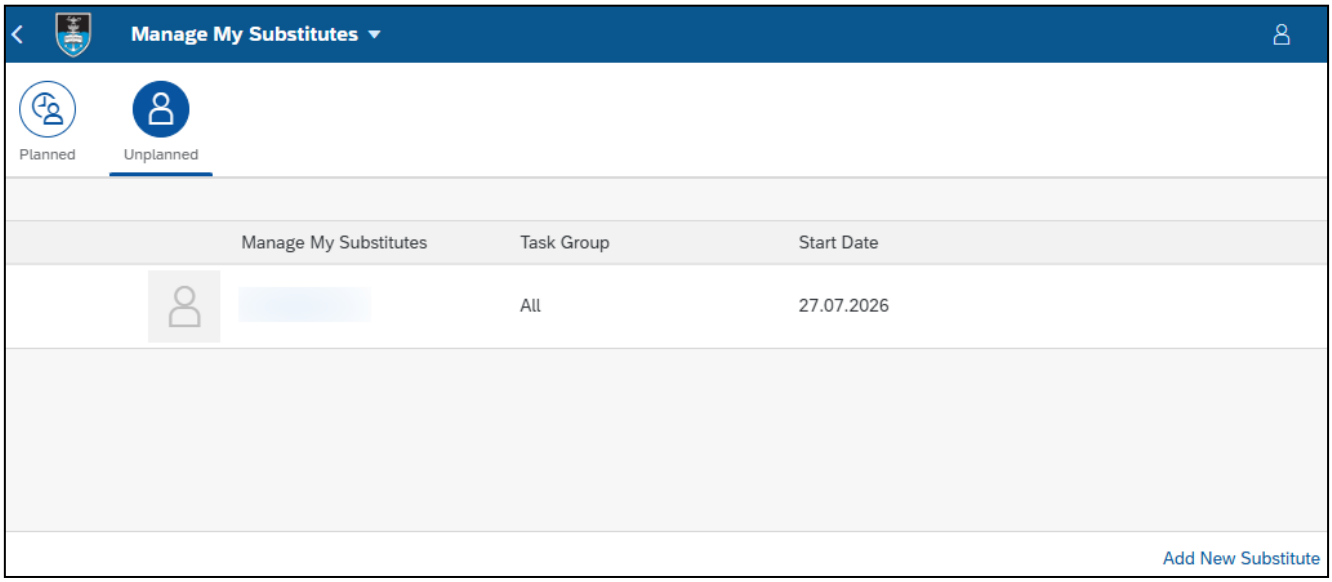
3. The *Manage My Substitutes* page appears, displaying any *Planned* substitutions you've added.



   - Click Unplanned to display any unplanned substitutions you've added.

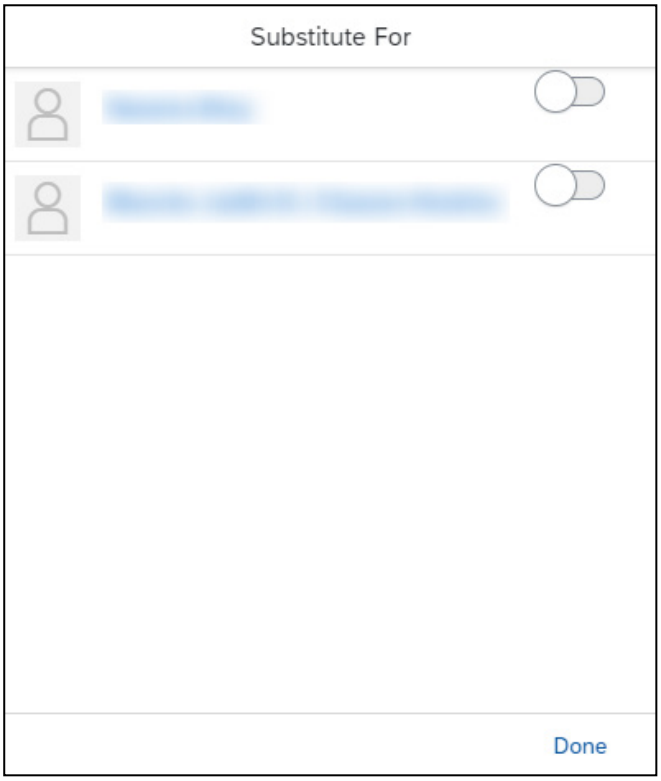
Reviewing all manager substitutions

- Unplanned substitutions are displayed.



- To see who has created an unplanned substitution to you, click (top right) and choose Substitute For.

4. The *Substitute For* dialogue box appears, displaying any unplanned substitutions you can accept (activate).
Note: It is not possible to display any planned substitutions set to you by other managers, the leave requests will automatically appear in your inbox during the substitution period.



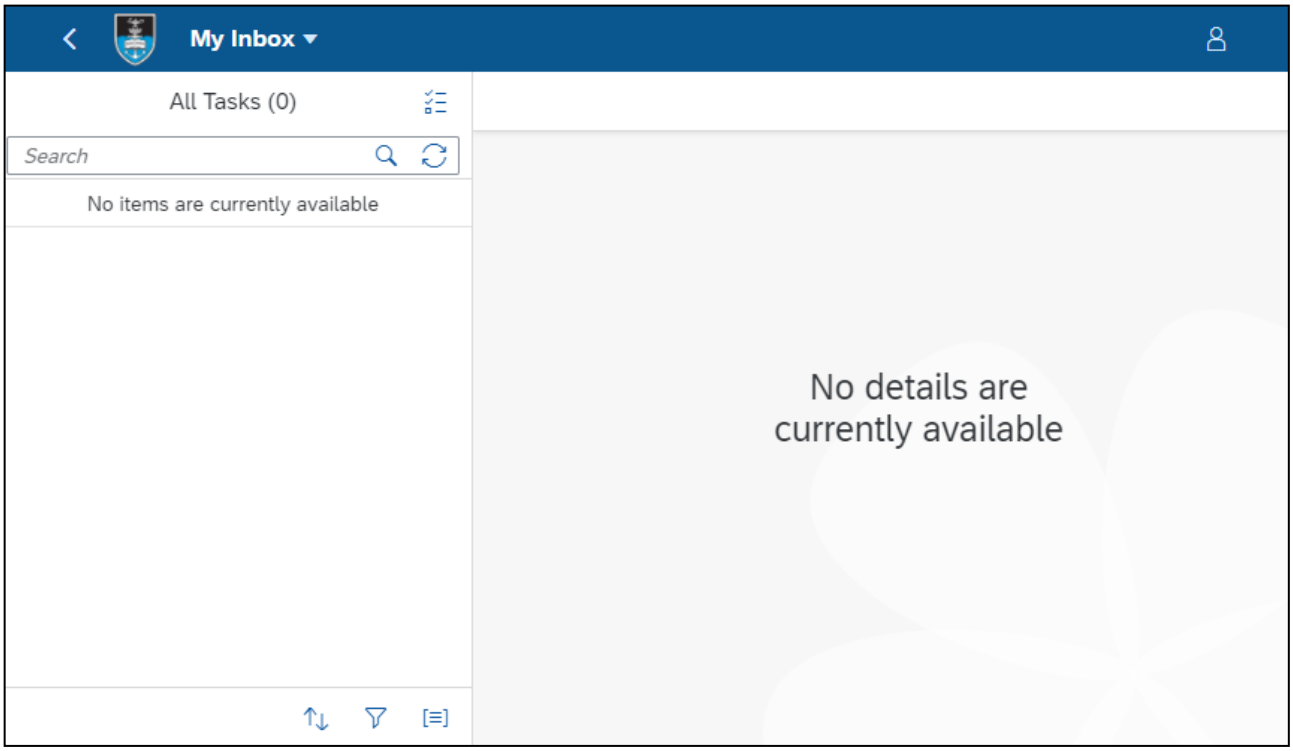
- Click *Done* to return to the *Manage My Substitutes* page.

- Click the UCT crest to return to the *Home* page.

Deleting a manager substitution

Procedure

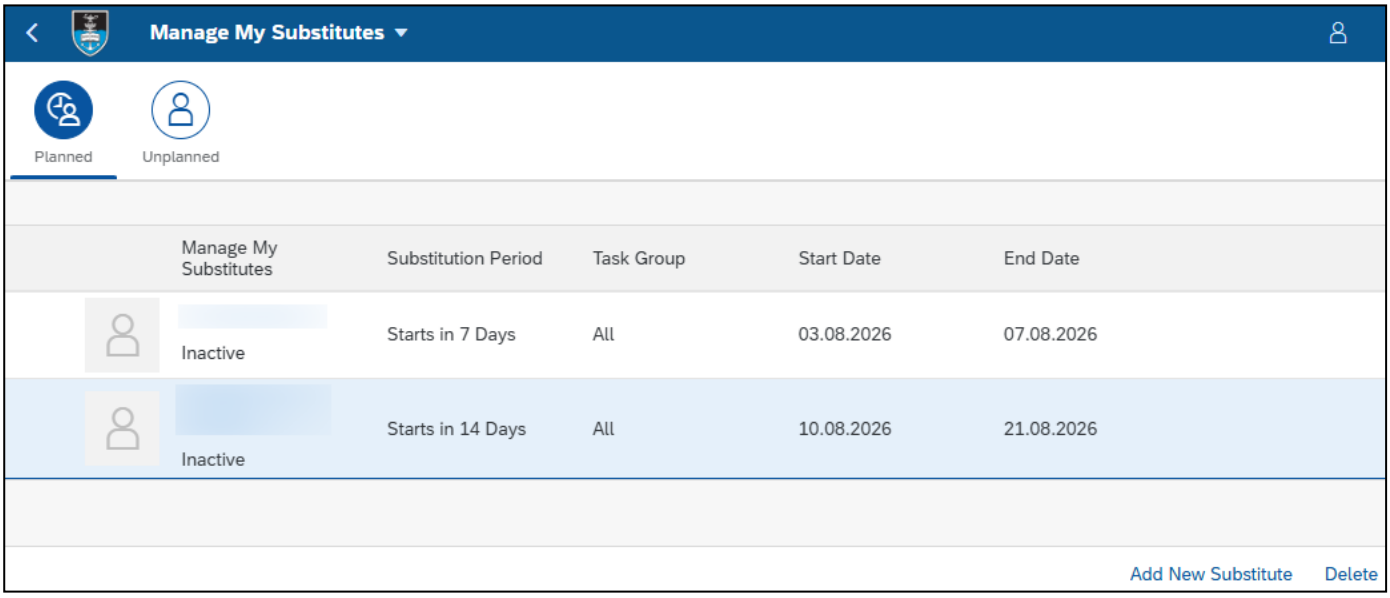
1. After logging in to HR Employee Self-Service, click *My Inbox* (in the *Manager Services* section).
2. The *My Inbox* page appears. If applicable, any pending leave requests will be listed.



   - Click (top right) and choose Manage My Substitutes.

3. The *Manage My Substitutes* page appears, displaying any *Planned* substitutions.

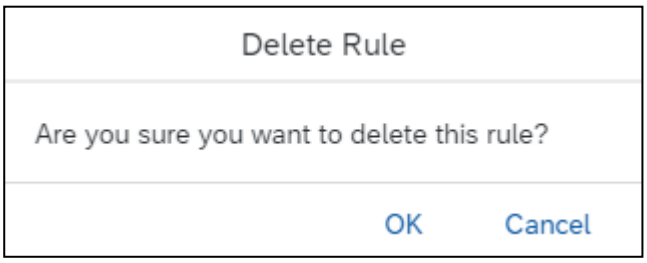
   - If deleting an unplanned substitution, click Unplanned.
   - Select the substitution line to delete.



   - Click *Delete*.

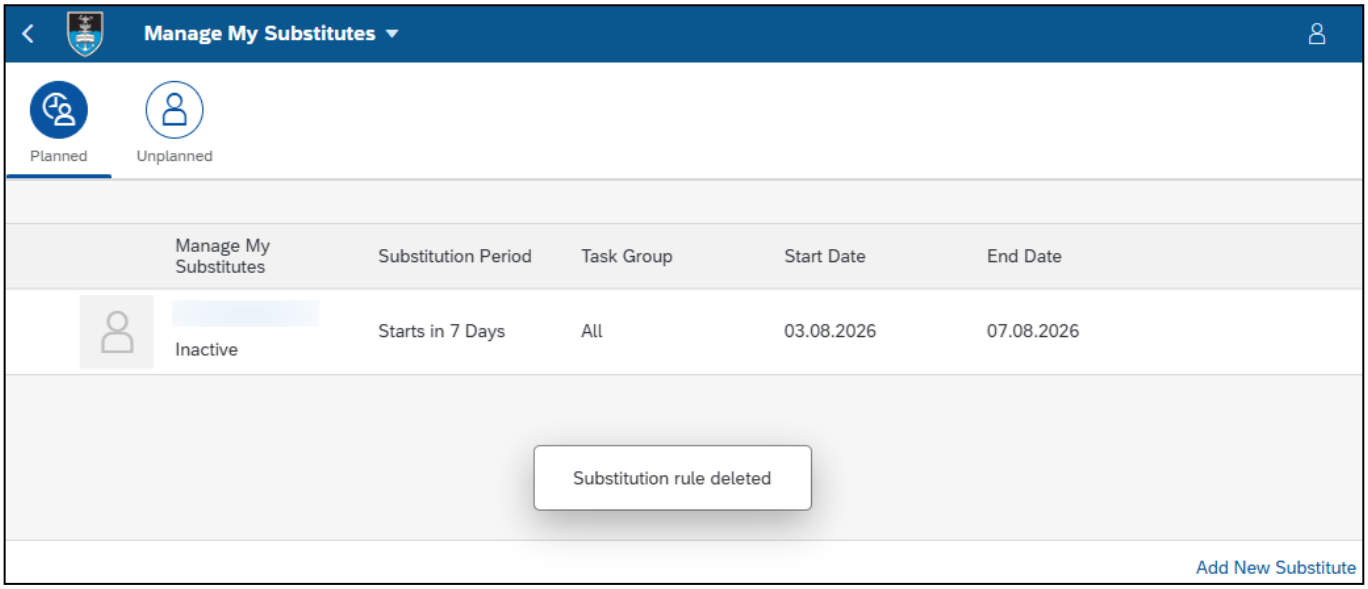
Deleting a manager substitution

4. The *Delete Rule* dialogue box appears.



   - Click *OK*.

5. The *Manage My Substitutes* page reappears. A message briefly appears at the bottom of the page to confirm the substitution rule was deleted.



   - Click the UCT crest to return to the *Home* page.