

UCT HR Employee Self-Service (ESS) guide for managers

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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.

Support

The <u>HR Employee Self-Service</u> 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 <u>ICTS Helpdesk</u>. If you have an HR-related query, please contact the <u>HR Administrator for your area</u>.

Procedure

- 1. Open a web browser (e.g. Google Chrome, Mozilla Firefox, Microsoft Edge).
- Log in to UCT HR Employee Self-Service via <u>https://sapfiori.uct.ac.za</u>.
 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.



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

4. The Enter password page appears.

← 01 @wf.uct.ac.za	
Enter password	
Password	
Forgot my password	
	Sign in

In the Password field, enter your network password.



- 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 <u>HR Employee Self-Service (ESS) guide</u>.
- Click the Manager Services tab (or scroll down the current page).

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

6. The *Manager Services* page / section appears.

Home 🕶	
Employee Services Mana	ager Services
My Inbox All Items	Employee Lookup Search for employees
Ľ 1	گم

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

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 in the *Inbox*, see <u>Approving PASS overtime</u>, <u>PASS standby and paid-on-claim hours</u>.

< 🛃 My Inbox 🔻		
All Tasks (4)	ž	Leave Requests Escalation
Search	9 C	
the transmission descention	Leave	
Request		Employee ID: 014 2 days
SAP Workflow	Medium	Period: 05.11.2021 - 08.11.2021 30.09.2021
Due on Oct 10, 2021, 2:15 PM		@UCT.AC.ZA
		+27 (21650)
Leav	/e	
Request		INFORMATION OVERLAP CALENDAR
SAP Workflow	Medium	
Due on Oct 10, 2021, 2:14 PM		
		Leave Type: Annual Leave
		Requested: 2 days
the residue and these	Leave	Available Balance: 2,50 days
Request		Total Deduction: 2,00 days
SAP Workflow	Medium	
Due on Oct 10, 2021, 2:12 PM		

- 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.

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

	Leave Requests Escalation	
+27 (21650)	Employee ID: 014 Period: 01.10.2021 @UCT.AC.ZA	1 day 27.09.2021
INFORMATION		
	Leave Type: Annual Leave Requested: 1 day Available Balance: 2,50 days Total Deduction: 1,00 day	

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

INFORMATION	COMMENTS	ATTACHMENTS O	/ERLAP CALENDAR			
		Leave Type: Requested: Available Balance: Total Deduction:	Sick Leave - Full Pay 5 days 25,00 days 5,00 days			
COMMENTS						
30.09.	2021, 15:20:45	: As discussed, mind	r surgery scheduled.			
ATTACHMENT	ſS					
med 30.09	ical_certificate.pd 0.2021, 15:20:46	f				
OVERLAP CA	LENDAR					
					Search	۹ 🔳
i Only emp	loyees with absence	s during November 8, 2	021 – November 12,	2021 are showr).	×
						1 Week 1 Month
< Today	> Novembe	r 7, 2021 - November 1	3, 2021			
Sun	Mon	Tue	Wed	Thu	Fri	Sat
7	8	9	10	11	12	13
			Week 45			
Administrative	Officer					
	Sick Leave November 8,	- Full Pay 2021 – November 12, 2021	L			
Administrative	Assistant					
← 🛱 Annual I Novembe	Leave r 5, 2021 – November 8	3, 2				

- 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.
	Submit Decision
	You selected "Approve".
	Decision Note:
	Add Note (Optional)
	Submit Cancel
	 If applicable, enter a note for the staff member in the <i>Decision Note</i> 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.
	Submit Decision
	You selected "Reject".
	Decision Note:
	Add Note (Optional)
	Submit Cancel
	 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.

If you want to	Then
claim or release a leave request (only used with <u>unplanned manager</u> <u>substitution</u>)	If you have <u>accepted (activated) an unplanned manager substitution</u> , 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.
	Å
	Leave Requests Escalation
	Leave Requests Escalation Employee ID: Period: 02.11.2021 @UCT.AC.ZA +27 1 day 26.10.2021 INFORMATION COMMENTS Task reserved successfully 1 day Available Balance: 11,00 days Approve Reject Show Log Release 1 . On the left, the Reserved by You message appears above the staff member's name. Image: Ny Inbox
	All Tasks (3)
	Search Q C
	Reserved by You Leave Request SAP Workflow Medium Due on Nov 5, 2021, 11:42 AM - 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.

<	My Leave Requ	est 🔻						8
	 Entitlement 							
	Items (7)				Show From	04.10.2021	Ē	
	Leave Type	Validity	Available	Used		Entitlemen	t	
	Compulsory Annual Leave	01.01.2020 - 31.12.2021	23 Days	3 Days		26 Days		
		01.01.2021 - 31.12.2022	19,5 Days	0 Days		19,5 Days		
	Accumulative Annual Leave	01.01.2004 - 31.12.9999	42 Days	44 Days		86 Days		
	Sick Leave	01.02.2017 - 31.01.2023	83 Days	7 Days		90 Days		
	Sick Leave Half Pay	01.02.2017 - 31.01.2023	90 Days	0 Days		90 Days		
			More [5/7]					
~	 Request Overview 							
	[14] Calendar 🛛 🗮 Items (10				Show From	01.01.2021	Ē	
	Leave Type	/alidity	Status	Approver	Quota Used			
	Annual Leave	10.06.2021	Approved		1 Days	Ø	\otimes >	
	Annual Leave ()7.05.2021	Approved		1 Days	P	\otimes	
	Annual Leave ()1.03.2021	Approved		1 Days	Crea	te Reque	t උ ^{දු}

To act on behalf of a team member that reports to you, click ^A 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 Employee
Search	٩
Direct Reports	
Employee Number: 01	
Employee Number: 01	
	Sec.
Employee Number: 01	
	Close

- 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.

< 🐺 My Leave Rec	quest 🔻							8
You are acting on behalf o	f employee "	(01)"						
✓ Entitlement								
Items (3)				Show From 04.1	0.2021		Ē	
Leave Type	Validity	Available	Used	En	ititleme	nt		
Compulsory Annual Leave	e 01.01.2021 - 30.06.2022	2,5 Days	1,75 _{Days}	11	L,25 Day	'S		
Sick Leave	01.04.2021 - 31.07.2022	4 Days	1 Day		6 Days			
Family Responsibility T1	01.08.2021 - 31.07.2022	2 Days	1 Day		3 Days			
 Request Overview 								
[🔀 Calendar 🔡 Items (2	13)			Show From 01.0	1.2021			
Leave Type	Validity	Status Approver		Quota Used				
Annual Leave	20.01.2022	You are acting on behalf of employee "		1 Days	Ø	\otimes	>	
Sick Leave - Full Pay	25.11.2021	Approved		1 Days	I	\otimes	>	
					Cre	ate Re	quest	

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

Creating a leave request on behalf of a team member

- When finished working with the team member's leave, click Sect 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.

<	My Leave Reque	st ▼								8
`	 Entitlement 									
	Items (7)					Show From	04.10.2021			
	Leave Type	Validity	Available		Used		Entitlemer	nt		
	Compulsory Annual Leave	01.01.2020 - 31.12.2021	23 Days		3 Days		26 Days			
		01.01.2021 - 31.12.2022	19,5 Days		0 Days		19,5 Days	5		
	Accumulative Annual Leave	01.01.2004 - 31.12.9999	42 Days		44 Days		86 Days			
	Sick Leave	01.02.2017 - 31.01.2023	83 Days		7 Days		90 Days			
	Sick Leave Half Pay	01.02.2017 - 31.01.2023	90 Days		0 Days		90 Days			
			More							
			[5/7]							
`	 Request Overview 									
_	Talendar 🗎 Items (10)					Show From	01.01.2021			
	Leave Type Va	lidity	Status	Approver		Quota Used				
	Annual Leave 10	0.06.2021	You are acting for you employee numbe	r own r		1 Days	P	\otimes	>	
	Annual Leave 07	.05.2021	Approved			1 Days	ß	\otimes	>	
							Crea	ate Req	uest	පී

- Click the

UCT crest to return to the *Home* page.

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

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	24 hours per day	12 hours per day
10 hours per non-working day		60 hours total per week
10 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: <u>Reviewing and</u> <u>processing a leave request</u>.

< 🐺 My Inbox 🔻			8
All Tasks (2)	ž.	Leave Requests Escalation	
Search SAP Workflow Due on Sep 10, 2023, 3:47 PM Approval of Working Times	Q C equest Medium	Ms Employee ID: 014 4 days Period: 26.09.2023 - 29.09.2023 31.08.2023 @UCT.AC.ZA +27 (21650)	
	Medium	INFORMATION Leave Type: Annual Leave Requested: 4 days Available Balance: 60,58 days Total Deduction: 4,00 days	
↑↓	∑ [≡]	Approve Reject Show Log C	laim 🖸

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

- Details of the selected approval appear on the right.

< 💓 My Inbox 🔻		۸8
All Tasks (2)	2	CATS: Approval by Supervisor
Search 's Leave Red SAP Workflow Due on Sep 10, 2023, 3:47 PM	Q C quest Medium	Approval of Working Times Status: Ready Priority: Medium Created on Aug 31, 2023, 3:44 PM
Approval of Working Times	Medium	The time data entered in the Cross-Application Time Sheet for the above employee is ready for approval. Execute the work item to approve or reject the data. or reject the data.
↑↓	∑ [≡]	Show Log Claim Open Task

- Click Open Task
- 3. The Approve Timesheet page opens in a new browser tab.

Approve Timesheet •						8
Manager			Employee			
Search Q						
Mrs						
Employee ID: 13						
Job Description: 20013254						
	Time Entries (6)				-	0
	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	Ę	
î					Approve R	eject

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.

Tuesday, August 1, 2023	0.00 Hours	Overtime	1.75 Hours
		Standby	6.00 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	5					
✓	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		
 Image: A start of the start of	Saturday, August 12, 2023		Overtime	2.00 Hours		Ę

- 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.

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

Assignment	Entered	Status		
Sunday, August 6, 2023				
	0,00 Hours			Comments
Monday, August 7, 2023				
Overtime	2,50 Hours	Rejected	■ <	
Tuesday, August 8, 2023				Rejection Reason: No prior approval
Standby	8,00 Hours	Approved		

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

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

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

< 🛃 My Inbox 🕶	8
All Tasks (0)	
Search Q 📿	
No items are currently available	
	No details are currently available
↑↓ 7 [=]	

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

6. The Manage My Substitutes page appears.

<		Manage My Su	ıbstitutes 🔻				8
Pla	anned	Unplanned					
		Manage My Substitutes	Substitution Period	Task Group	Start Date	End Date	
				No data			
							Add New Substitute



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

7. The Manage My Substitutes dialogue box appears.

		Manag	ge My S	ubstitut	es	
Sea	arch					Q
			No da	ta		
						Cancel

- 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.

	Manage My Substitut	es
		XQ
	Administration	Ø
2	Development	ı
2	Services Hub	0
2	Services Hub	ı
		Cancel

- Select the appropriate staff member by clicking their line.

8. The Choose Task Group dialogue box appears.

<	Choose Task Group	
$\stackrel{\circ}{\frown}$	University of Cape Town	
All Task	Groups >	
All	>	
	Cancel	

- Select All.
- 9. The Choose Substitution Period dialogue box appears.

<		Choose Substitution Period							
$\overset{\text{O}}{\square}$	Univ	University of Cape Town							
	Task All	Task Group All							
¢	Sub: Fron	Substitution Period From Today							
	<		Octo	ber		202	1	>	
		Sun	Mon	Tue	Wed	Thu	Fri	Sat	
	40	26	27	28	29	30	1	2	
	41	3	4	5	6	7	8	9	
	42	10	11	12	13	14	15	16	
	43	17	18	19	20	21	22	23	
	44	24	25	26	27	28	29	30	
	45	31	1	2	3	4	5	6	
							Save		Cancel

- 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.

10. 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 <u>unplanned substitution</u> 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.

<	Mana	age My Substitutes 🔻				
C2	(2					
Planned	Unplar	nned				
		Manage My Substitutes	Substitution Period	Task Group	Start Date	End Date
	8		Ends in 5 Days	All	05.10.2021	10.10.2021
		Active				

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

Planned	Unpla	nned				
		Manage My Substitutes	Substitution Period	Task Group	Start Date	End Date
	$\stackrel{\circ}{\frown}$	Inactive	Starts in 6 Days	All	11.10.2021	17.10.2021

Example: Planned substitution from today with no end date.

Planned	Unplar	Inned				
		Manage My Substitutes	Substitution Period	Task Group	Start Date	End Date
	0		No end date	All	05.10.2021	
		Active				

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

	Manage My Substitutes	Substitution Period	Task Group	Start Date	End Date
$\stackrel{\circ}{\frown}$	Inactive	Starts in 6 Days	All	11.10.2021	17.10.2021
\mathbb{C}	Inactive	Starts in 13 Days	All	18.10.2021	24.10.2021
\mathbb{C}	Inactive	Starts in 20 Days	All	25.10.2021	29.10.2021

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 VCT crest to return to the *Home* page.

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.

< 📑 My Inbox 🔻	8
All Tasks (0)	
Search Q 🗘	
No items are currently available	
	No details are currently available
↑↓ 7 [=]	

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

3. The Manage My Substitutes page appears.

<		Manage My S	Substitutes 🔻				۵
	2						
	anneu	onplanned					
		Manage My Substitutes	Substitution Period	Task Group	Start Date	End Date	
				No data			
							Add New Substitute

- Click Unplanned
- Click Add New Substitute (bottom right).
- 4. The *Manage My Substitutes* dialogue box appears.

	Manage My Substitutes	
Search		Q
	No data	
		Cancel

- 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 \bigcirc Search.

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

	Manage My Substitutes	60
		XQ
	Administration	ı
2	Development	1
-	Services Hub	1
9	Services Hub	ı
		Cancel

- Select the appropriate staff member by clicking their line.
- 11. The *Choose Task Group* dialogue box appears.



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

12. 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 <u>planned substitution</u> can be recreated but the dates will determine which substitutions are active or deleted.

<	Manage	My Substitutes 🔻			8
Planned	Unplanned				
		Manage My Substitutes	Task Group	Start Date	
	\mathbb{C}		All	25.10.2021	
			Substitution rule created		
					Add New Substitute

- To create another unplanned substitution, repeat from step 3 above.
- The substitute manager must <u>accept (activate) the unplanned substitution</u> when required. No leave requests
 will be sent to the substitute manager's inbox without this step.



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 <u>stopped (deactivated)</u> 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.

< 📳 My Inbox 🕶			8
All Tasks (0)	¥11		
Search (A C		
No items are currently available			
		No details are currently available	
t, ⊽	[≡]		

Click A (top right) and choose A 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.

Substitute For						
8		\bigcirc				
2						
	You are now receiving the tasks of					
		Done				

- 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: <u>Deleting a manager substitution</u>.

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.

K My Inbox •			8
All Tasks (0)	ž=		
Search Q	0		
No items are currently available			
		No details are currently available	
↑↓ ▽	[=]		

Click (top right) and choose S Substitute For

Stopping (deactivating) an unplanned manager substitution

3. The Substitute For dialogue box appears.

Substitute For					
8		\bigcirc			
8					
		Done			

 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.



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.

< 📑 My Inbox 🕶			8
All Tasks (0)	11		
Search Q	С		
No items are currently available			
		No details are currently available	
î, 7	[=]		

- Click A (top right) and choose A Manage My Substitutes
- 3. The Manage My Substitutes page appears, displaying any Planned substitutions you've added.

<		Manage My Substitutes 🔻						
Planned		Unplanned						
		Manage My Substitutes	Substitution Period	Task Group	Start Date	End Date		
	9	Active	Ends in 5 Days	All	26.10.2021	31.10.2021		
ć	9	Inactive	Starts in 6 Days	All	01.11.2021	07.11.2021		
							Add New Substitute	

- <u>(8</u>)
- Click Unplanned to display any unplanned substitutions you've added.

Reviewing all manager substitutions

- Unplanned substitutions are displayed.

<	Manage	My Substitutes 🔻			8
Planned	A Unplanned				
		-			
		Manage My Substitutes	Task Group	Start Date	
	$\stackrel{\text{\tiny O}}{=}$		All	26.10.2021	
					Add New Substitute

- To see who has created an unplanned substitution to you, click </u> (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.

	Substitut	e For	
8			\bigcirc
8			\bigcirc
			Done

- 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.

< 📳 My Inbox 🔻			8
All Tasks (0)	ž		
Search	9 C		
No items are currently availab	ole		
		No details are currently available	
↑J	∑ [≡]		

- 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.

< (i	Manage My Substitu	ites 🔻					8
Planne	ed	Unplanned						
		Manage My Substitutes	Substitution Period	Task Group	Start Date	End Date		
	8	Inactive	Starts in 6 Days	All	11.10.2021	17.10.2021		
							Add New Substitute	Delete

Click Delete.

Deleting a manager substitution

4. The *Delete Rule* dialogue box appears.

Delete Rule				
Are you sure you want to delete this rule?				
	ОК	Cancel		

- 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.

<	Manage My Substi	itutes 🔻				8
Planned	Unplanned					
	Manage My Substitutes	Substitution Period	Task Group	Start Date	End Date	
			No data			
			Substitution rule d	leleted		
						Add New Substitute

Click the UCT crest to return to the Home page.