People and Money system

We realise this formatting may not be accessible for all – to request this document in an alternative format please email hrhelpline@ed.ac.uk

GH Administrator Guide to the Guaranteed Hours Module

Before you start, make sure you refer to the Guide for Guaranteed Hours for background information on the end to end process and off system steps.

Contents

Contents........................................................................................................................................1
To Access the Module: ..................................................................................................................2
Employee Lists..................................................................................................................................3
  How to Create Employee Lists in the GH Module.................................................................3
  How to Maintain Employee Lists in the GH Module............................................................8
  Adding or Removing Employees from Employee Lists.........................................................12
Work Activities...............................................................................................................................13
  How to Create and Maintain Work Activities .......................................................................13
  How to View Employee Balances..........................................................................................16
Work Plans.....................................................................................................................................18
  Things to be aware of: .............................................................................................................18
  How to Create and Maintain a Work Plan ............................................................................18
  Editing/Deleting a Work Plan.................................................................................................23
  How to Copy Previous Work Plans for GH Employees..........................................................25
  How to Create and Assign Work Plans to Multiple GH Employees......................................28
  What to do if an employee rejects a work plan? .................................................................32
1. From the People & Money Homepage navigate to the Guaranteed Hours tab and select the **Guaranteed Hours** app.

2. The module will open to a homepage. The Reporting Dashboard will appear after selecting options from the drop down menus at the top. The options available to you in these menus will depend on the Area of Responsibility you have.
3. The menu on the left hand side is where you will navigate to various parts of the module.

Employee Lists

For more information on what Employee Lists are and why you might use them, please refer to the Guide for Guaranteed Hours, linked at the start of this document.

**How to Create Employee Lists in the GH Module**

1. From the Guaranteed Hours main page, click Admin on the left hand side and select Employee List
2. Select the **Create Employee List** button in the top right hand corner.
3. Choose employees to be added into the list either by selecting **Add Employees (Search)**, **Add Employees (Upload)** or **Add Employees (From Lists)**.

4. To add Employees from Lists, choose the correct list from the dropdown menu and then click the **Add** icon beside the employee’s name.
5. To Add Employees from Search, enter the employee’s name or employee number into the search box and click **Add**.

6. To Add Employees by Upload, type the employee number into the **Employee Nos** box and click **Add**.
7. Enter a name for the list and enter the drop down values for College/PSG, School/Planning Unit and Department. You can also make the list public and make it editable here too.

- Private lists are ones that only the GH Administrator can view.
- Public lists are ones that all GH Administrators within the same area of responsibility can view.

8. Select **Save List** or **Save & Set Defaults** to complete the list creation.

- For GH employees who have multiple assignments or work using different work activities, a Default Work Activity can be set in relation to the nature of this specific list.
How to Maintain Employee Lists in the GH Module

1. On Guaranteed Hours main page, open the Admin tab then choose Employee List.

2. Choose the name of the list to be maintained from the List Name field.
3. Click the pencil icon next to the chosen list.

4. Choose employees to be added into the list either by selecting one of the following:
   - Add Employees (Search)
   - Add Employees (Upload)
   - Add Employees (From Lists)

5. To Add Employees from Lists, choose the correct list from the dropdown menu and then click the Add icon beside the employee’s name.
To **Add Employees** from **Search**, enter the employee’s name or employee number into the search box and click **Add**.

To **Add Employees** by **Upload**, type the employee number into the Employee Nos box and click **Add**.

**NOTE**: The **Clear All** button can be used to remove all names from the list.
6. Once you have added the correct employee(s), click either **Save List** to finish the task or **Save & Set Defaults** to edit the default assignments and hours.

7. Then **set default assignments and hours** against the employee list and click **Save** when you are finished.

For GH employees who have multiple assignments or work using different work activities, a **Default Work Activity** can be set in relation to the nature of this specific list.

For GH employees who usually work the same hours, an **Expected H/W** can be selected for the list.
Adding or Removing Employees from Employee Lists

1. Go to the **Employee Lists** screen and press the **pencil** icon beside the desired list.

2. To add employees: Follow step 4 to 5 in “How to Maintain Employee Lists in the GH Module” above

   To remove employees: click the **X** icon beside their name.

3. Click either **Save List** to finish the task or **Save & Set Defaults** to edit the default assignments and hours.
Work Activities

For more information on what Work Activities are and why you might use them, please refer to the Guide for Guaranteed Hours, linked at the start of this document.

How to Create and Maintain Work Activities

1. On the Guaranteed Hours main page, open the Admin tab then choose Work Activities.

2. Click the Create Work Activity button to create new work activity.
3. Fill in the relevant details and click **Create Work Activity** to save.

- **College/ Professional Services Group** - Required field. List of College/Professional Services Groups.

- **School/ Planning Unit** - Required field. List of School/Planning Units of the selected College/Professional Services Group.

- **Department** - Required field. List of Departments of the selected School/Planning Unit.

- **Additional Analysis** - Optional field. Additional analysis values are buildings in which the work may have taken place or the course in which the work correlates to. Course listings will be updated bi-annually.

- **Work Category** - Required field. List of work categories which is also present on timesheets.

- **Comment** - Required text field. This can be used to describe and identify the work activity.
4. To edit or delete the work activity, go to the Work Activities screen and select edit on the activity which needs to be changed.

5. Edit the work activity details and click Save Work Activity or click Delete Work Activity to delete this activity. This will now apply to future instances.
How to View Employee Balances

1. From Guaranteed Hours main page go to Reports and choose GH Balances.

2. Click on the employee’s name to open the Employee Details menu.
In the Employee Details window, you can view the GH employee’s details, limits, and guaranteed hours balance.

**Column descriptions:**

- **Accepted (Confirmed/Agreed):** Total accepted hours of confirmed/agreed work plans for the assignment and GH period dates.
- **Declined (Confirmed/Agreed):** Total declined hours of confirmed/agreed work plans for the assignment and GH period dates.
- **Accepted (Pending):** Total accepted hours issued but not confirmed/agreed for the assignment and GH dates.
- **Declined (Pending):** Total declined hours issued but not confirmed/agreed for the assignment and GH dates.
- **OTL Hours:** Hours that have been claimed and paid via the payroll.
- **Date Last Paid:** Latest date of timesheet data for the assignment and GH dates.
- **Accepted (After Paid):** Total accepted hours confirmed, agreed or issued for the assignment and GH dates after Date Last Paid (ie: not yet been paid for).
- **GH Remaining (Actual):** The Guaranteed Hours figure for the GH Period minus the Paid figure.
- **GH Remaining (Notional):** The Guaranteed Hours figure for the GH Period minus the Paid figure minus the Accepted (After Paid) figure minus the Declined (Confirmed/Agreed) figure minus the Declined (Pending) figure.
- **Confirmed:** Where an employee has confirmed via an issued work plan that they agree to the work plan.
- **Agreed:** Where an employee has agreed to a work plan off-system and a GH Administrator has input this to the system on their behalf, without the need for them to action or agree digitally.
Work Plans

Things to be aware of:

- You cannot create a work plan for someone if they do not have a current GH period.
- You can check what someone’s most recent GH period is via the ‘GH Periods’ report, clicking on the employee’s name and viewing the ‘GH Balance’ section (clicking the historical toggle will show all previous GH periods). A new GH period is added to a record via the GH Refresh process.
- If a GH employee is to be given a work plan for a department that is not the one that their assignment contracts sits in, the work plan must first be created in their substantive department, and then the work plan edited to change the department.

How to Create and Maintain a Work Plan

Adding a Work Plan for one employee

1. From the Guaranteed Hours main page, click Work Plans on the menu on the left hand side.
2. Then choose **Create Work Plan** from the menu on the left hand side (a), then **Create Work Plan** on the right (b):

3. Choose the desired values in the relevant fields and click **Add Work Plan** to continue.

a. **College/ Professional Services Group** - Required field. List of College/Professional Services Groups.

b. **School/ Planning Unit** - Required field. List of School/Planning Units of the selected College/Professional Services Group.

c. **Department** - Required field. List of Departments of the selected School/Planning Unit.
d. **Work Activity** – Pop up list that displays all active work activities created under the selected hierarchy structure. This list shows the work activity number, additional analysis, work category and comment. If a work activity is selected, it will populate the Additional Analysis, Work Category and Work Activity Comment fields with the relevant values selected.

e. **Week Commencing** - Required field. List of week commencing dates. These will always be Mondays.

f. **Number of Weeks** – the number of continuous weeks from the **Week Commencing** that the Work Plan should apply to.

g. **Employee** - Required field. Searchable list of employees (name and number). Only employees with an assignment in the selected College/Professional Services Group / School/Planning Unit / Department are shown.

h. **Assignment** – select the assignment from the drop down.

i. **Confirmation Required?** - Checkbox. If checked, the work plan status is set to **Issued** and a notification is sent to the employee to agree plan. If unchecked, status is **Confirmed**. This means the administrator creating the work plan is entering it as an already accepted piece of work.

j. **Accepted** - Required field that denotes Accepted hours. This must be a positive number with up to 2 decimals but can be zero if **Declined** is not zero. Accepted can mean either the number of hours that the employee is being offered for the first time. It could also be the amount of hours that the employee has already indicated (offline) that they will work and they are now being asked to confirm formally or the administrator is confirming on their behalf.

k. **Declined** - Required field that denotes Declined hours. This must be a positive number with up to 2 decimals but can be zero if **Accepted** is not zero. This is most likely to be completed by the administrator if there has been an indication offline that the employee has declined some hours and the administrator is now recording this in the system.
4. Click **Create Work Plan** to save.

---

**Adding Multiple Work Plans Using Employee Lists (Creating the same work plan for multiple employees)**

1. From Guaranteed Hours main page select **Create Work Plans** then click the **Generate Work Plans** tab.
2. Choose the desired values in the relevant fields and click **Generate Work Plan** to continue.

- **College/ Professional Services Group**: Required field. List of College/Professional Services Groups
- **School/ Planning Unit**: Required field. List of School/Planning Units of the selected College/Professional Services Group.
- **Department**: Required field. List of Departments of the selected School/Planning Unit.
- **Employee List**: Required field. Includes standard lists such as College/Professional Services Group Employees; School/Planning Unit Employees, Department Employees and My Employees, as well as custom employee lists.
- **Week Commencing**: Required field. List of week commencing dates. These will always be Mondays.
- **Number of Weeks**: Required field. The number of continuous weeks from the **Week Commencing** that the Work Plan should apply to
- **Use Default Accepted Hours?**: Options are Yes and No. Default will be Yes. If Yes, plans will be created using defaults set in the Expected (H/W) field for the employee list.
- **Use Default Work Activities?**: Options are Yes and No. Default will be Yes. If Yes, plans will be generated using default values set under Additional Analysis, Work Category and Work Activity Comment fields for the employee list selected.
• **Confirmation Required?**- Checkbox that is checked by default. If checked, the work plan status is set to *Issued* and a notification is sent to the employee to agree plan. If unchecked, status is *Confirmed*. This means the administrator creating the work plan is entering it as an already accepted piece of work.

3. Then click **Create Work Plans** to save.

---

**Editing/Deleting a Work Plan**

1. From the main Work Plans screen, click the **pencil** icon in the relevant row to edit/delete a work plan.
2. To edit a work plan go to step 4.

3. To delete a work plan, click **Delete Work Plan**.

4. To edit a work plan, change the relevant field(s) and click **Save Work Plan**.
How to Copy Previous Work Plans for GH Employees

1. From the Guaranteed Hours main page go to Work Plans.

2. Click Create Work Plans on the left and select the Copy Work Plans tab.
3. Choose previous work plans to copy from.

4. Choose the period the work plan is to be copied to. Capture the time frame of the duration the work plan is to be applied for.
5. Click **Copy Work Plans**, this generates the work plans into a staging area to allow for a final review and any further changes that may be needed.

6. Finally, select **Create Work Plans** to confirm the creation.
How to Create and Assign Work Plans to Multiple GH Employees

1. From the Guaranteed Hours main page, open the Work Plans tab then select Upload Work Plans.

2. Download the pre-formatted spreadsheet template:
3. Complete the spreadsheet accordingly

<table>
<thead>
<tr>
<th>Employee Number</th>
<th>School/Planning Unit</th>
<th>Department</th>
<th>Week Commencing</th>
<th>Week Ending</th>
<th>Assignment Number</th>
<th>Accepted</th>
<th>Declined</th>
<th>Work Activity Number</th>
<th>Confirmation Required</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>School of Economics</td>
<td>Economics</td>
<td>03/10/2020</td>
<td>28/10/2020</td>
<td>E138</td>
<td>35</td>
<td>10</td>
<td>299</td>
<td>yes</td>
</tr>
<tr>
<td></td>
<td>School of Economics</td>
<td>Economics</td>
<td>34/10/2020</td>
<td>18/12/2020</td>
<td>E44</td>
<td>25</td>
<td>1</td>
<td>267</td>
<td>yes</td>
</tr>
</tbody>
</table>

a. **Employee Number** - Required field.
b. **School/Planning Unit** - School/Planning Unit for the work plan.
c. **Department** - Department for the work plan.
d. **Week Commencing** - Week commencing date for the plan. Required if week ending date is not provided.
e. **Week Ending** - Week ending date for the plan. Required if week commencing date not provided.
f. **Assignment Number** - Required field. The Assignment number will be prefixed with an E for employee.
g. **Accepted** - Required field that denotes the accepted hours. If left blank, then this field is set to zero, but this field can be zero if **Declined** field is not zero.
h. **Declined** - Required field that denotes the declined hours. If left blank, then this field is set to zero, but this field can be zero if **Accepted** field is not zero.
i. **Work Activity Number** - The number of the Work Activity to be used to reference the values for Additional Analysis, Work Category and Work Activity Comment.
j. **Confirmation Required?** - This field refers to requiring the relevant GH employee to accept the Work Plan.
4. Save your spreadsheet to your own files as a **CSV file** – this is the only file format that the module will accept.

5. Upload the work plan into the **Select File** field at the bottom. If the file is not in a format that can be processed, change the file type to the correct format (.CSV). Then click **Next**.

6. Review the **Work Plan Validation** screen once the system has found all entries from the spreadsheet. Click **Validate** to continue.
7. The **Work Plan Results** screen will show if there are any errors or exceeded limits. To fix this and proceed, you can do either of the following:

8. Proceed with the valid entries only by clicking **Create Work Plans**. Then later go back to the spreadsheet, remove all the entries already processed and edit all remaining entries.

9. Start the process again by going back to the spreadsheet and correcting the entries the validation picked up. Either return to Step 1 or click **Previous** twice to return to the Upload Work Plans screen.
10. Produce the invalid entries spreadsheet by clicking Actions then Download to edit errors.

**Note:** Do not upload the error report as this won’t work. Make sure when you are uploading you use the original template everytime.

**Note:** Please check all spelling and punctuation is correct as the system will not be able to proceed if these aren’t correct.

*What to do if an employee rejects a work plan?*

GH Administrators will receive an email notification to let them know that an employee has rejected a work plan. They will then need to review these, work plans that should not be left in the system as ‘rejected’.

GH Administrators should amend the rejected work plan and log any hours the employee cannot work as declined hours as well as the hours they can work as ‘Accepted’.

E.g.: an employee is offered 20 hours but can only work 10. They note this on the work plan when they reject it (they should not accept a work plan unless they are accepting it entirely). The GH Admin then views this rejected plan and edits it, amending the accepted hours to 10, and the decline hours to 10.

- If you would like this to go back to the employee to confirm, ensure the ‘Confirmation required’ box is ticked and click ‘Reissue Work Plan’.

- If you are happy that the employee does not need to reconfirm, untick the ‘Confirmation required’ box and click ‘Reissue Work Plan’.