MANAGER FUSION TRAINING NOTES

What Managers can do in Fusion (HR & Payroll) – August 2024

(HR & Payroll):
Training Guide

Introduction

Now that Fusion has been live for just over a year, we thought it would be useful to provide a guide of what's available to managers in Fusion in the HR / Payroll space. Through your 'My Team' area in Fusion, managers have the ability to carry out the following HR and Payroll functions:

Please CTRL and click on the section within the Contents index that you would like to visit

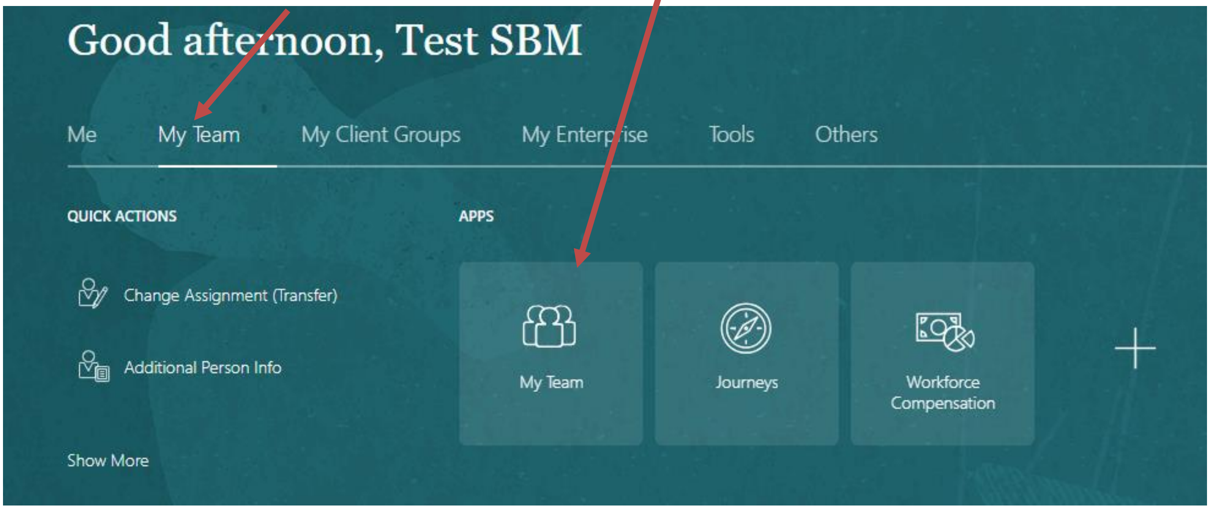
Contents

1.0 Absence Records

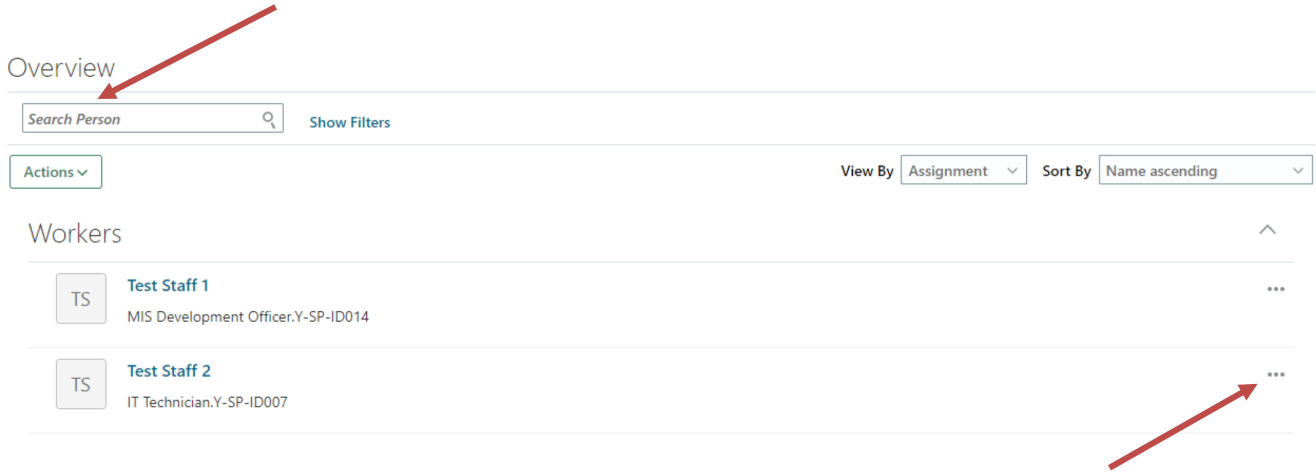
1.1 Absence Balance

If your staff are utilising Fusion to record annual leave, you can click into this area to check annual leave balances for your staff within your team.

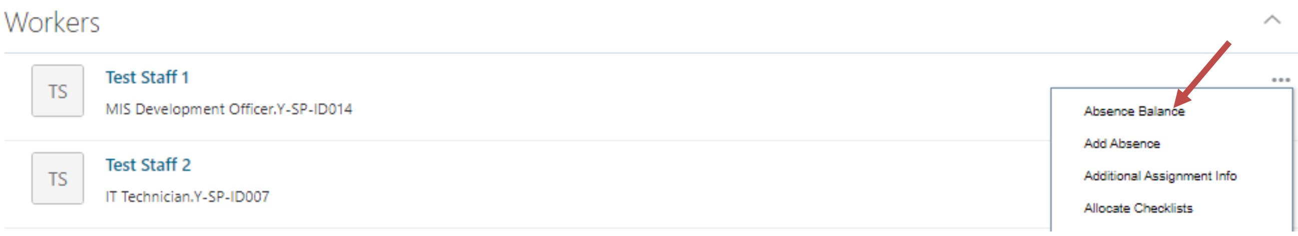
Log in and click on 'My Team' tab then the 'My Team' tile.



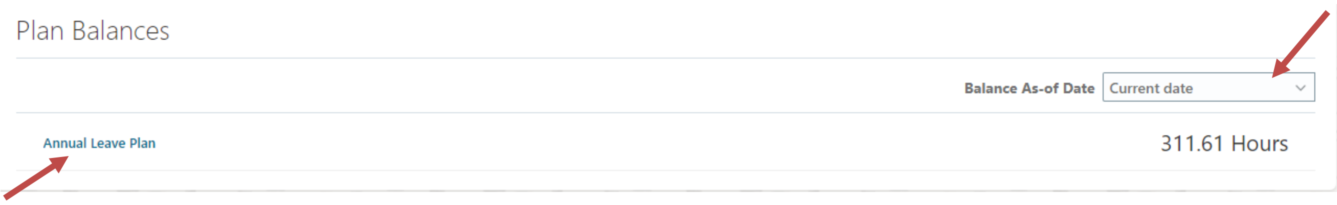
Your team appears, remember to click on the blue "Load more items" if the person you want is not shown immediately or use the Search Person Bar at the top of the screen to search for part of their name and everyone with that text will appear.



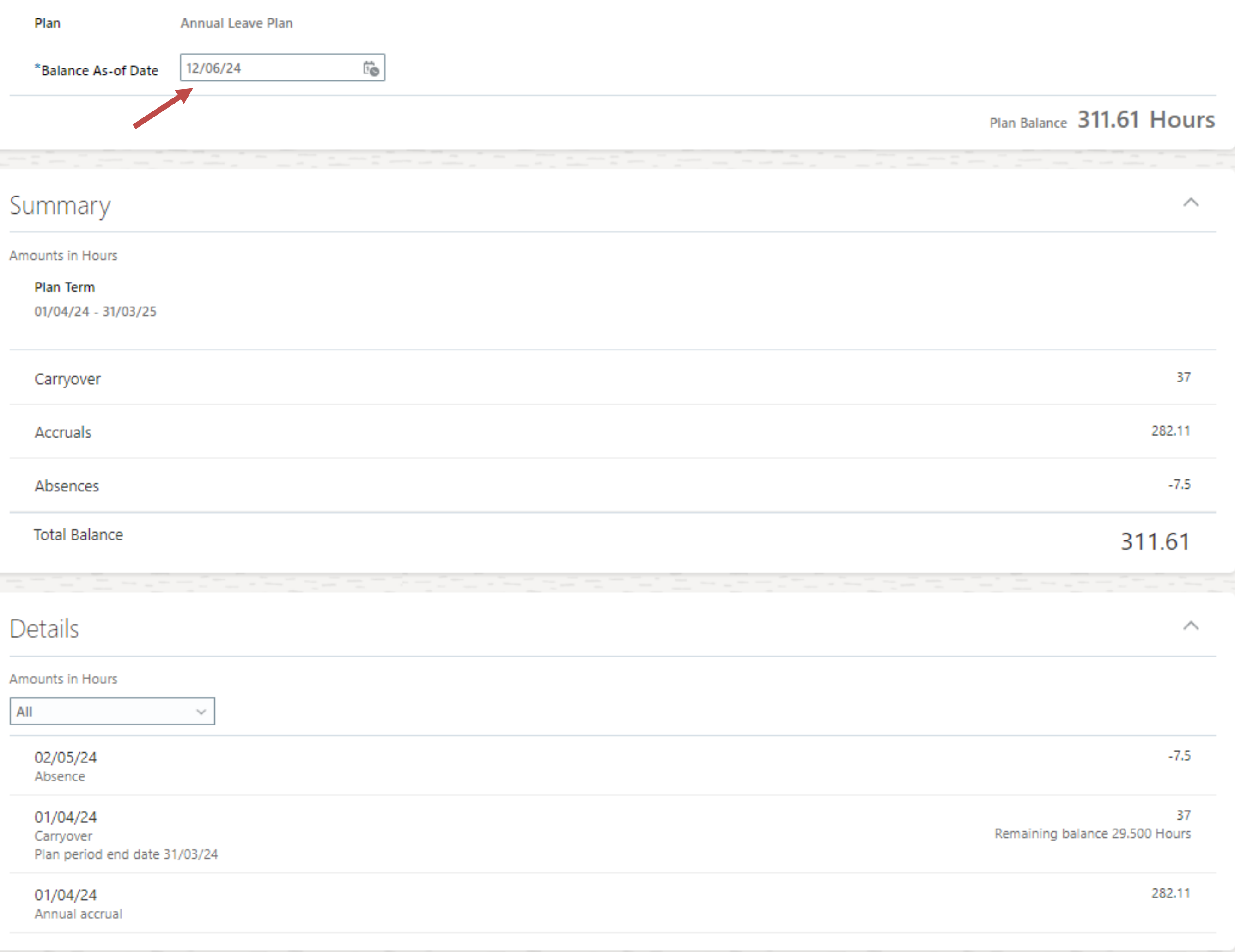
Click into Absence Balance as follows:



Once you have accessed the Plan Balances area for the individual you can see the current leave balance as of the current date, you can change the date to the last day of the leave year to check all booked leave – Last Calculation Date. Selecting this allows you to include all taken as well as scheduled leave

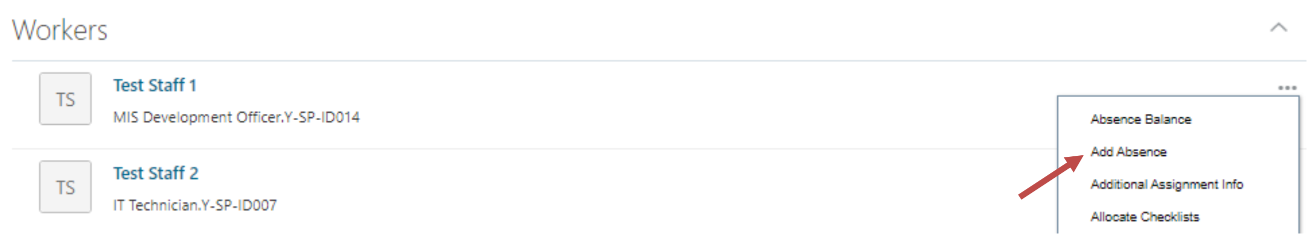


You can also click into the annual leave plan to see how the balance was calculated, and check the balance against different dates.



1.2 Add Absence

To add an Absence for a staff member please click into the 'My Team' tile as detailed above, click on the 3 menu dots to the right of the individual's name, as shown, and then click into 'Add Absence.'



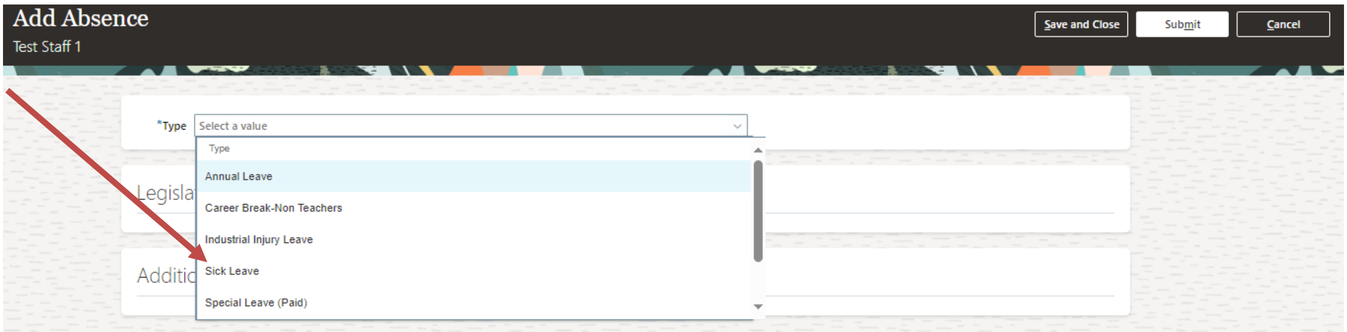
You then have the option to choose:

- Annual Leave
- Career Break
- Industrial Injury
- Sick Leave
- Special Leave (Paid)
- Strike Action
- Unpaid Leave

In this guide we will take you through adding Sick leave and Special Leave both paid and unpaid.

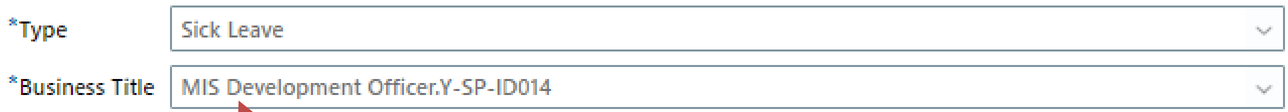
Sick Leave

Please Note: from Friday 13 September 2024, please see the new way of adding sickness entries [in Coming Next, Section 11.]

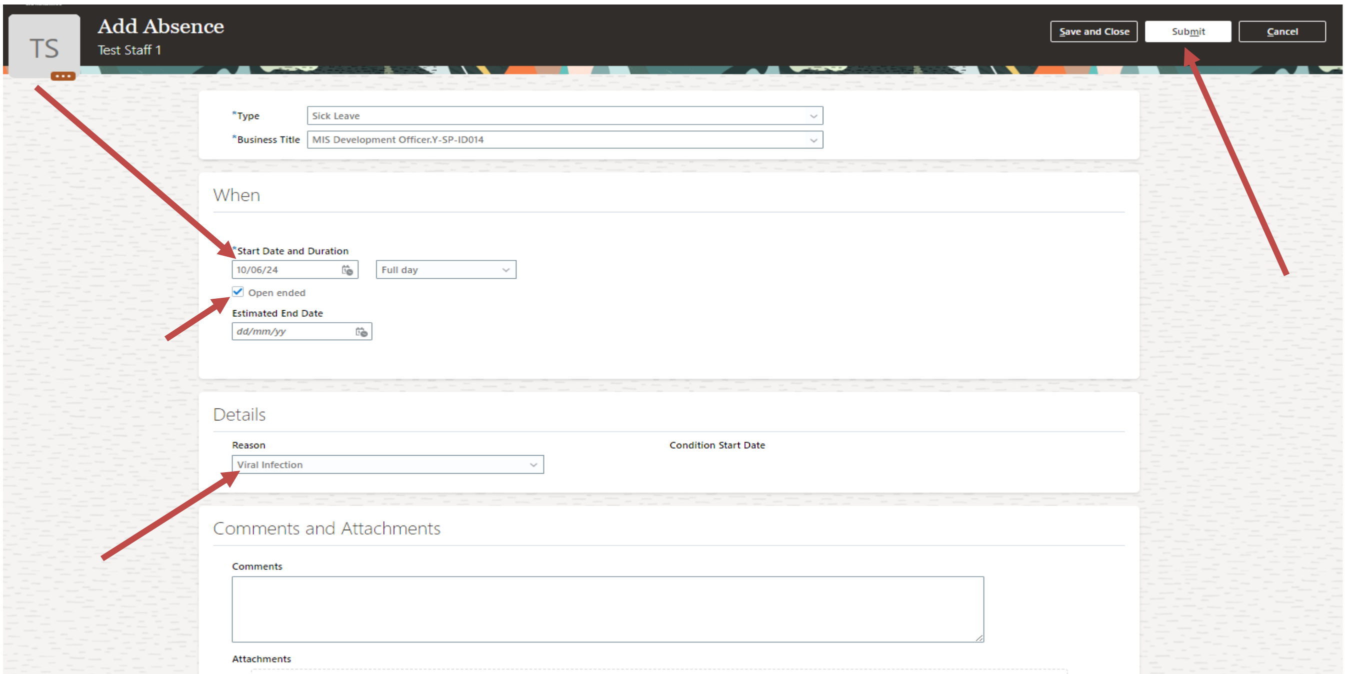


Please remember: if a part time staff member works 2 days per week, but is off sick that whole week, you should be recording the sickness from the first day of sickness until they return the following week, the day before they return to work, as an example; If someone works Monday and Tuesday and called in sick Monday morning, and wont be back until the following week, you should be recording from Monday to the Sunday.

For those with multiple assignment, please ensure you are selecting the correct one, or select all assignments at the top of the screen before entering the sickness details.



Then add the first day of the sickness on the start date, if you don't have a return date, click the Open-ended button, add the sickness reason and any comments and then press submit.

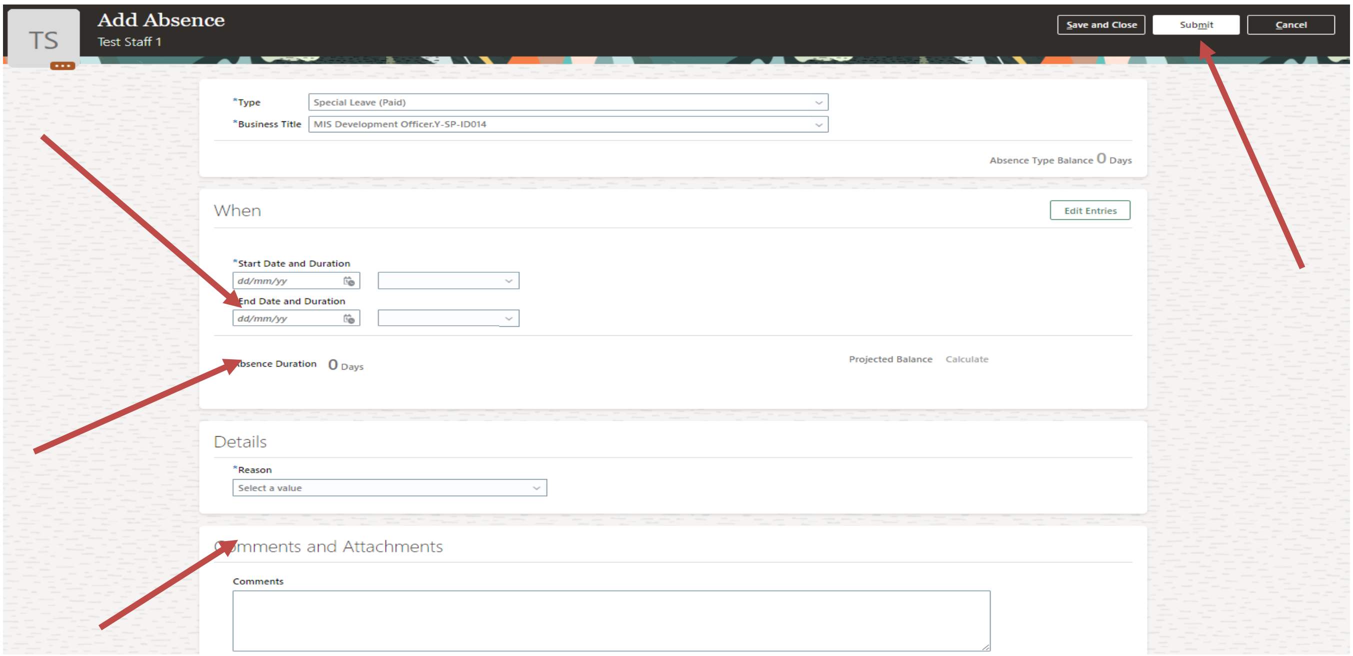


Special Leave (Paid) and Unpaid Leave

Follow the above entry steps and select Special leave (Paid) or Unpaid Leave from the drop-down option and, if it's a single day off, you can select the same date in the to and from date boxes, add the reason in the text bar and then press the submit button in the top right-hand corner.

Please remember that if the reason isn't listed in the drop down, select search and type in the reason.

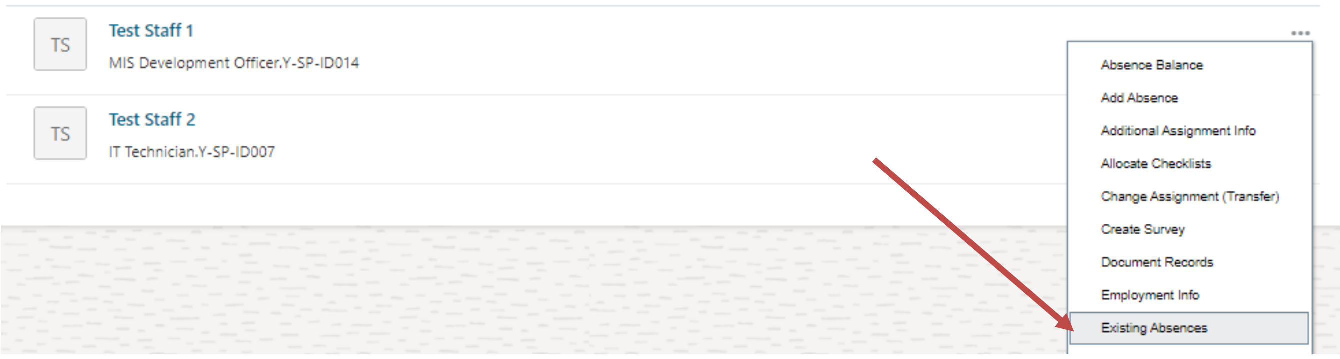
Please remember to select the correct assignment from the Business Title at the top of the screen for the paid/unpaid leave.



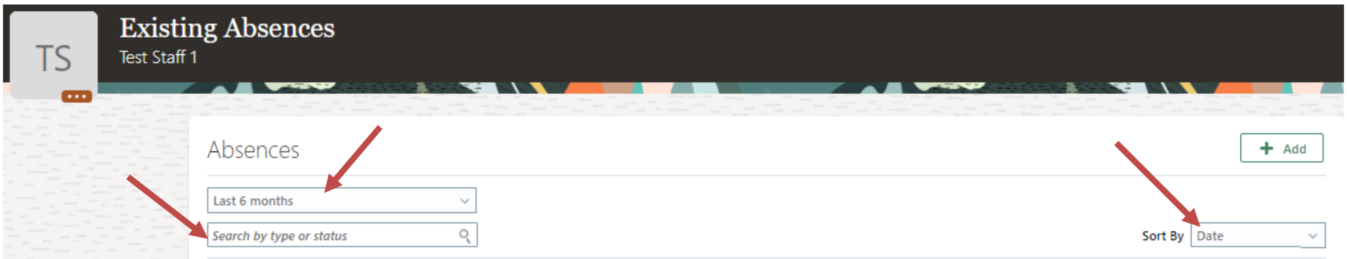
Please remember: you can only select half or full days for Special Leave (Paid), but you have the ability to add Unpaid Leave in hours. Use the Edit Entries button to go in and edit the number of hours of unpaid leave to be deducted from your team member per day.

1.3 Existing Absences

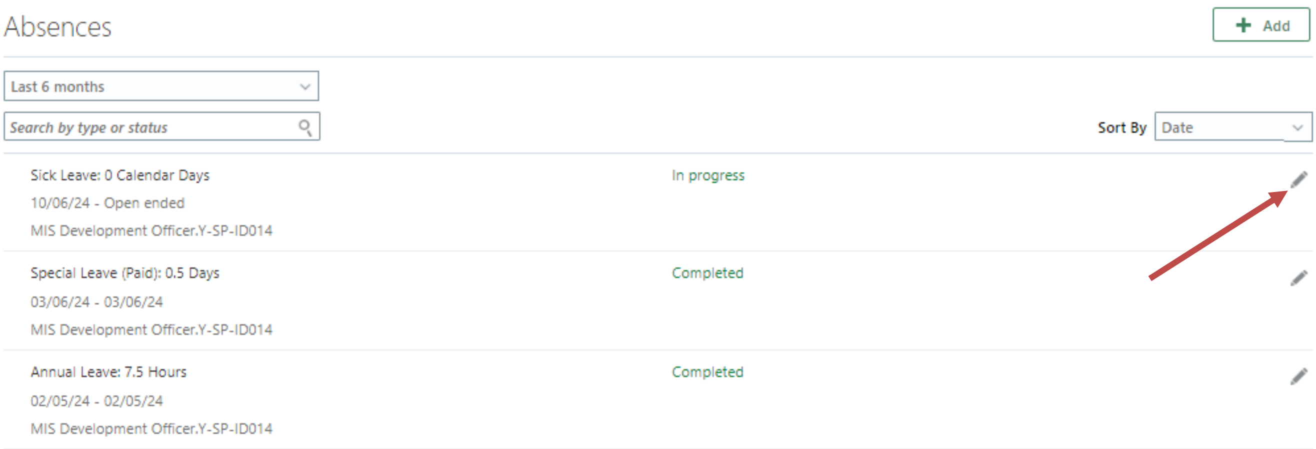
To view all absences for your staff member, click into the 'My Team' area, access the three menu dots and select Existing Absences.



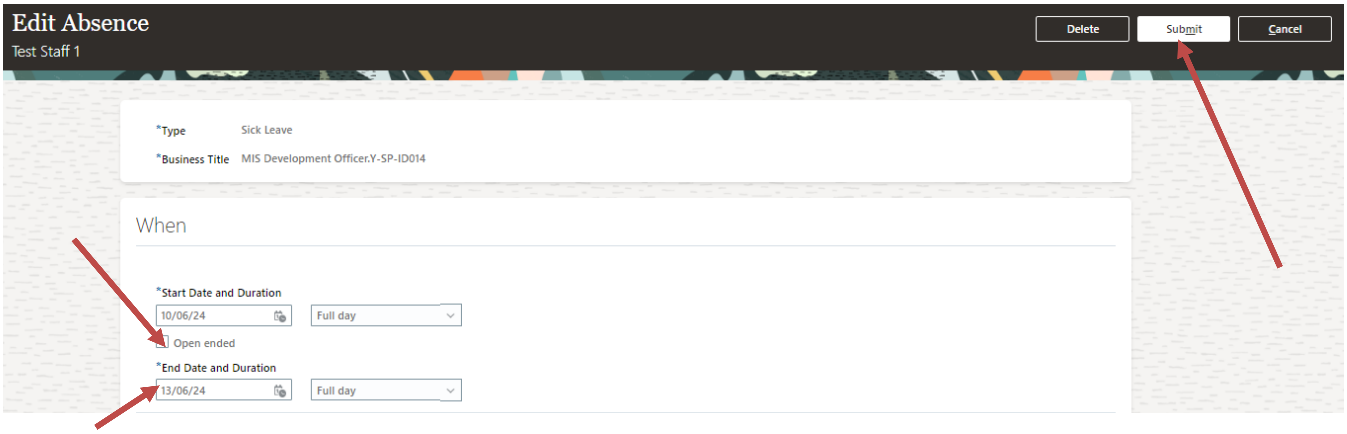
Once you are through to the Absence screen you can search for absences by selecting the date parameter at the top of the screen, search by date or by type or status.



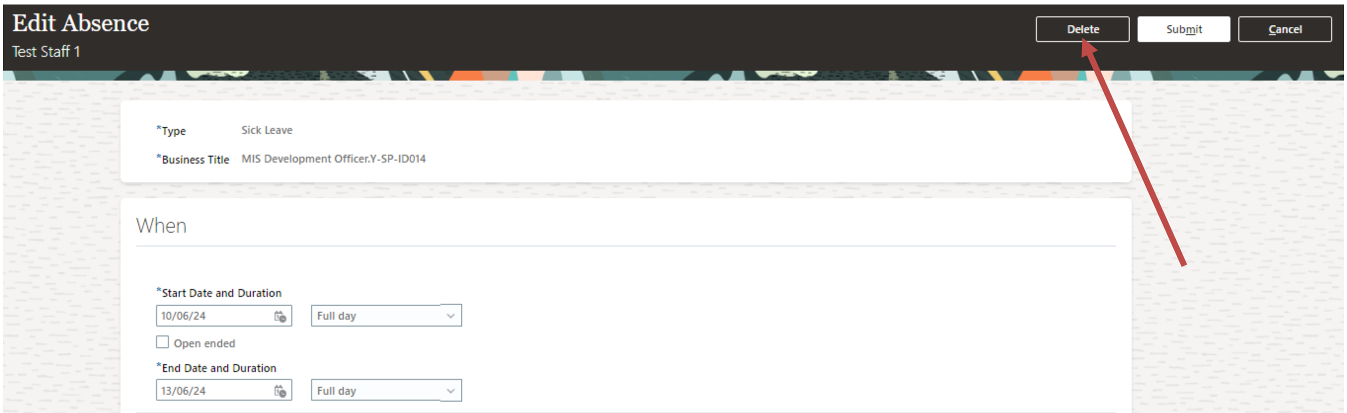
You can also use this area to access open ended sickness entries as well as close them down. You can update the record by clicking the little pencil icon on the right-hand side on the entry you want to update.



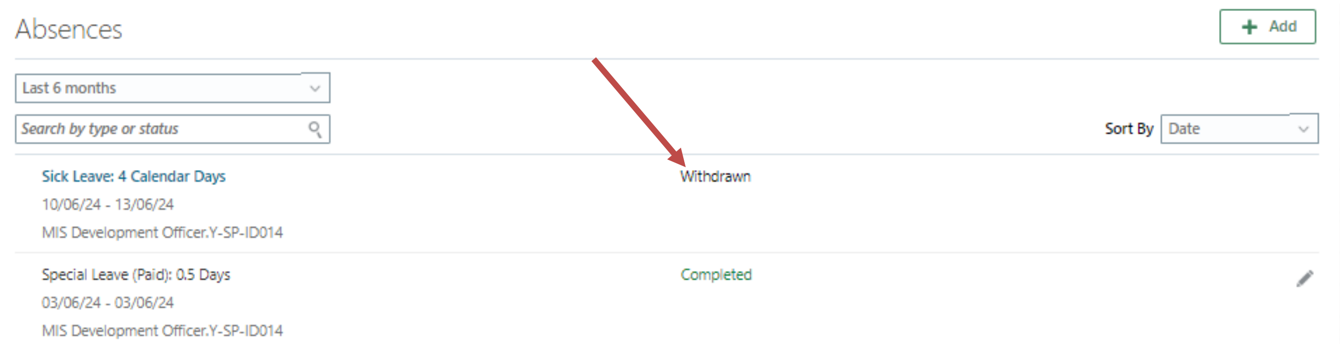
Once opened, please remember to untick the open-ended button before you enter the end date and, once completed, press submit.



You also have the ability to withdraw the absence by clicking the ‘Delete’ button at the top right hand of the screen.



You can then view the record as withdrawn.

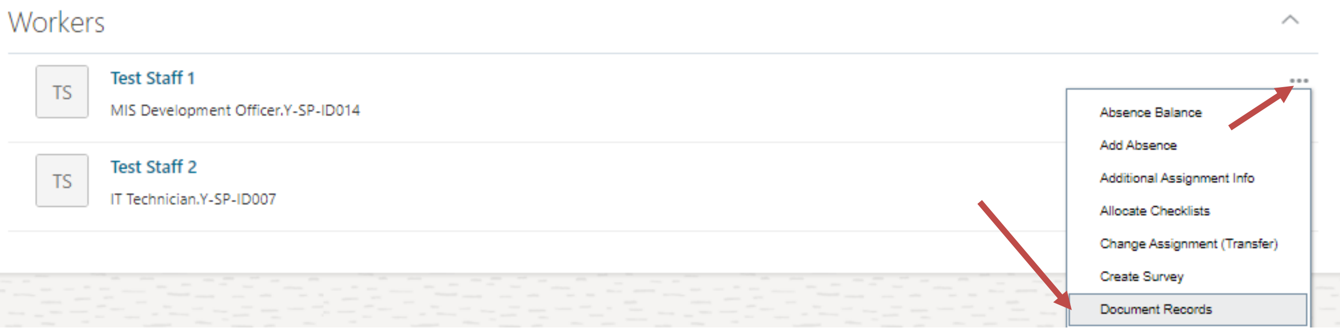


Absence Functionality Shut Down

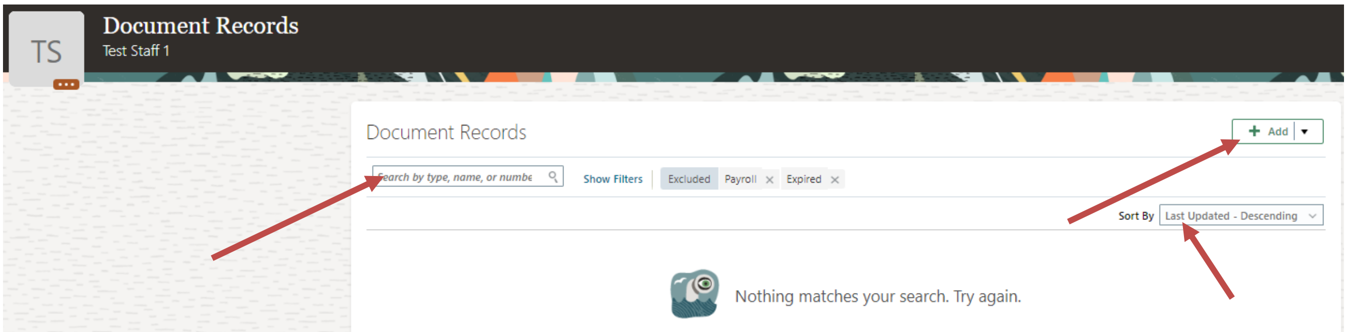
Please Remember: Payroll shuts down certain functionality like sick leave twice per month while the payment runs are going through, a few days before the 15th and the 28th. The functionality is usually down for approximately 4 days each time. If sick leave is missing from your add absence drop down, it’s because of the Payroll announcement, which you can find at the bottom of the Fusion Homepage each time this happens.

2.0 Document Records

To access Document Records, follow the above instructions into the 'My Team' area. Click onto the three dots menu and select Document Records.



Previous document records will appear in this area, but you also have some search options, you can search by names, type or number, or by date. To then add a document record, click on the +Add button on the right-hand side of your screen.



You can create the following documents in this area:

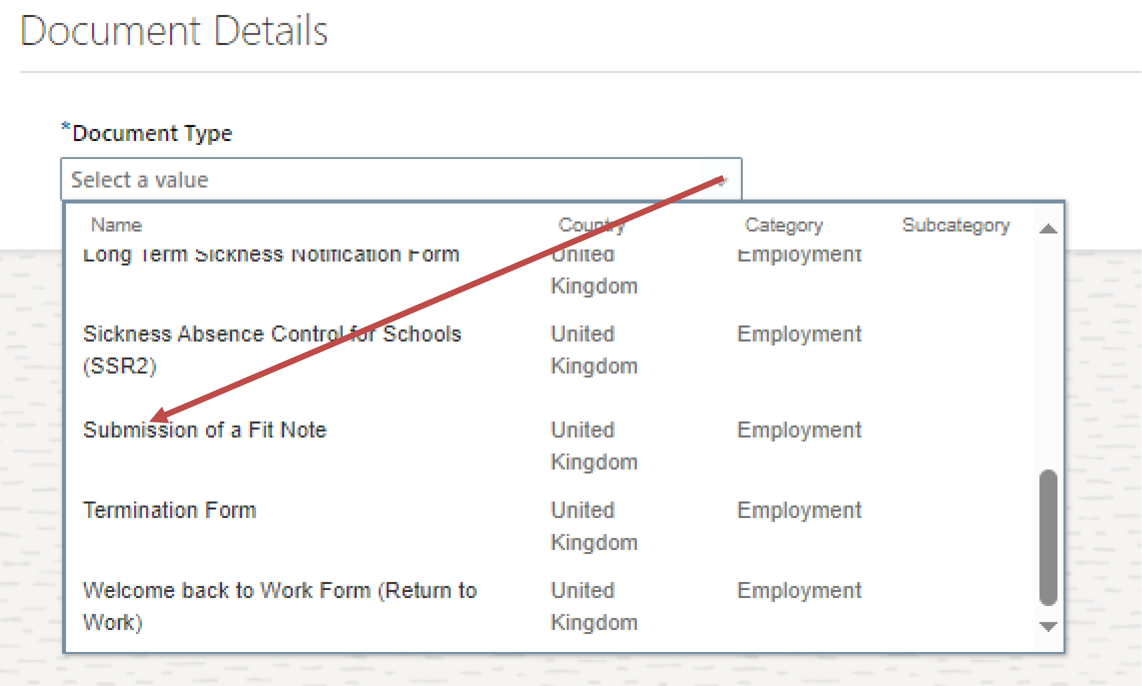
- Probation Forms
  - 6 weeks
  - 20 weeks
  - 32 weeks
- Career break request
- Carer Register Application Form
- Leave of Absence
- Termination Form
- Sickness Forms
  - Advisory Notice Sickness Form
  - Day 1 Sickness Absence Update
  - Day 4 Sickness Absence Update
  - Long Term Sickness Notification Form
  - Sickness Absence Controls for Schools
  - Submission of a Fit Note
  - Welcome back to work (Return to Work)

In this guide we won't go through how to create each of the documents, but we will look at the , Submission of a Fit Note, Welcome back to Work form, and Termination Form.

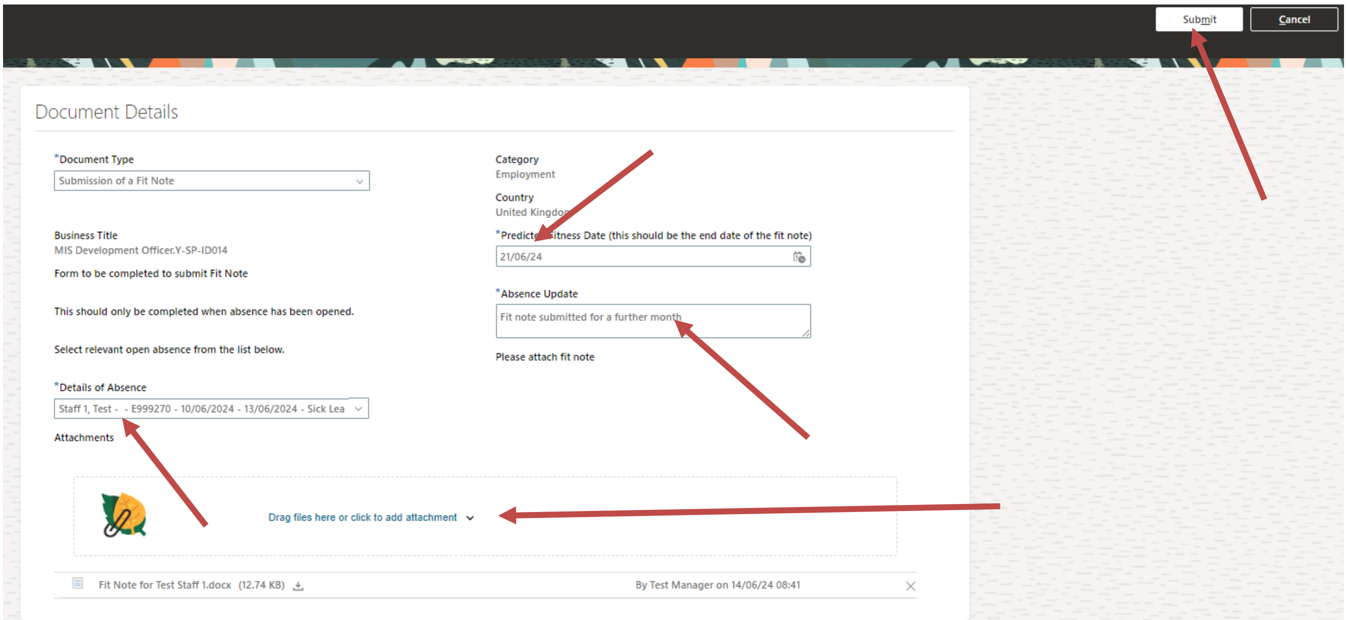
Please Remember: before you can create any sickness forms, you first must create the absence record and press submit, so you can link the absence to the document you are creating.

2.1 Submission of a Fit Note

To submit a fit note for a staff member, follow the steps as detailed in 2.0 above, and select Submission of a Fit note from the drop-down menu.

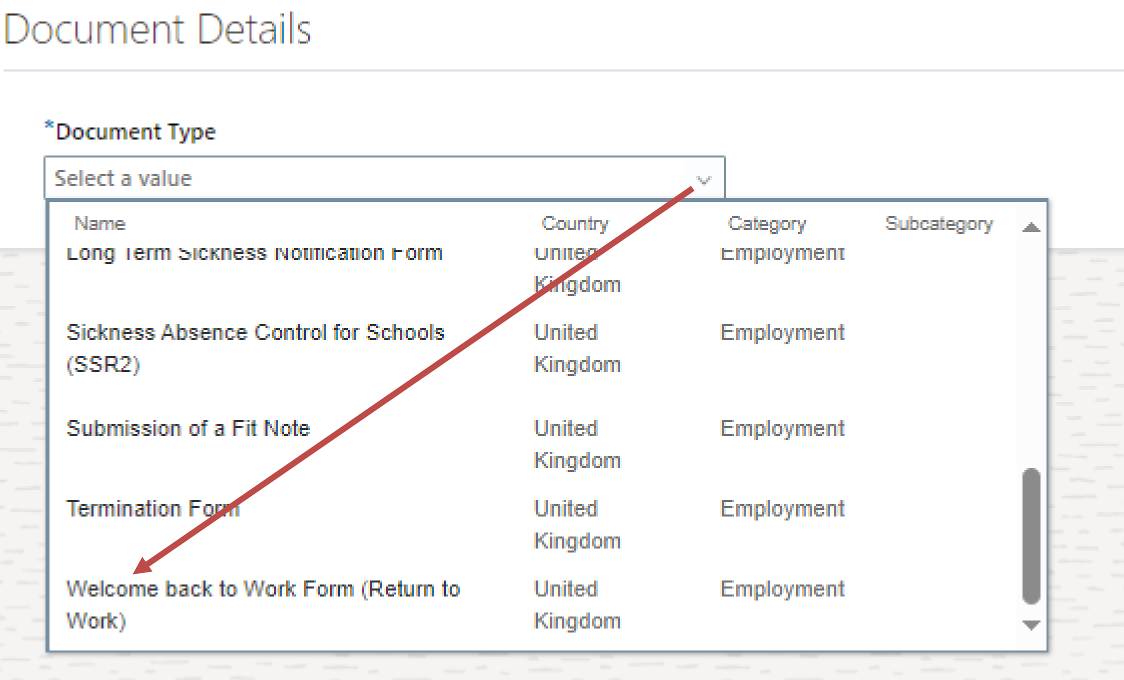


In the Details of Absence drop down, remember to link the correct absence to this document, you can search for absences if it doesn't automatically appear. Add the predicted fit note return date, add your Absence Update comments, attached the fit note by clicking into the attachment area and selecting the file or by dragging the file into the area, then press the Submit button in the top right-and corner.

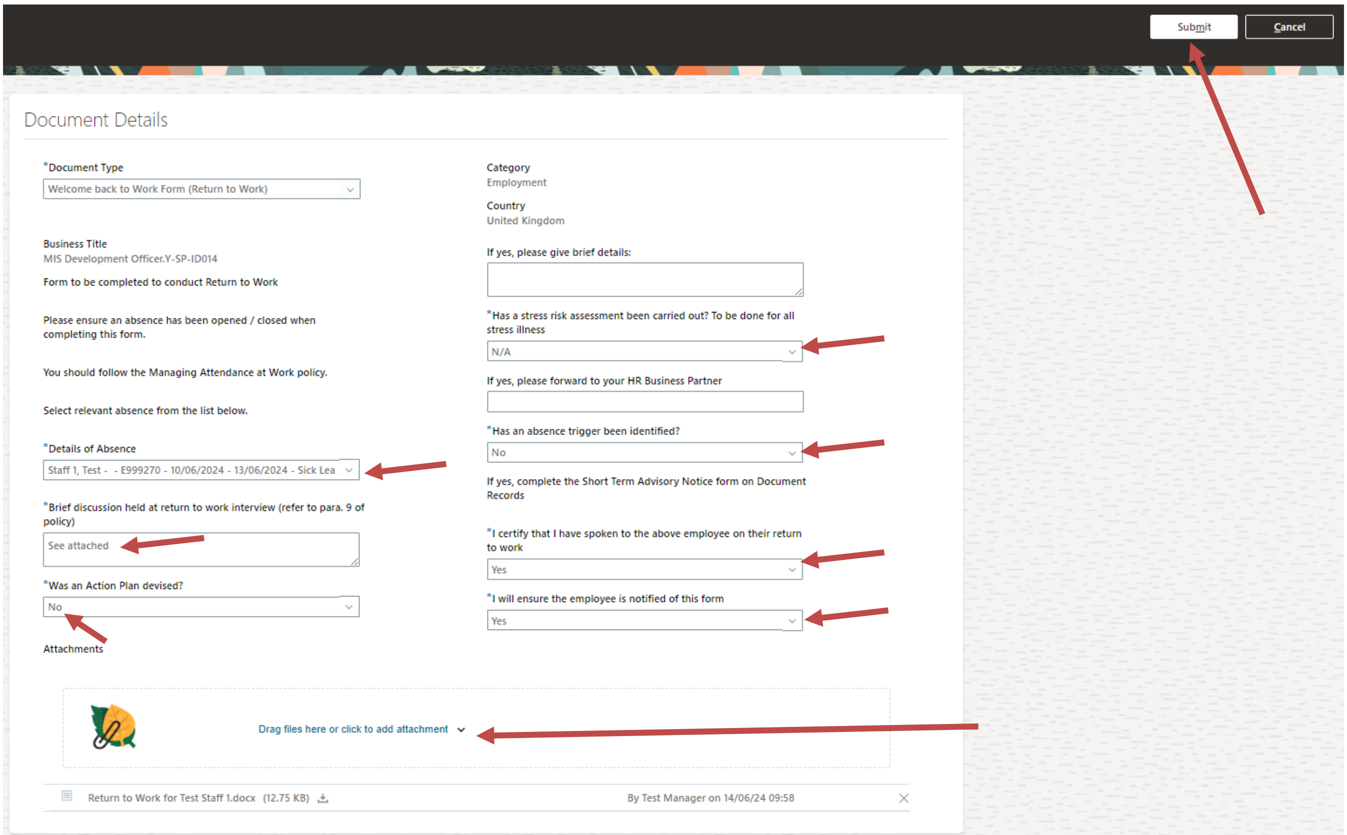


2.2 Welcome back to Work Form (Return to Work)

To create a Welcome back to Work form, access the 'My Team' area, click into Document Records via the three dot menu next to the relevant member of staff, and select the Welcome back to Work Form (Return to Work) from the drop-down menu that appears from clicking the +Add button.



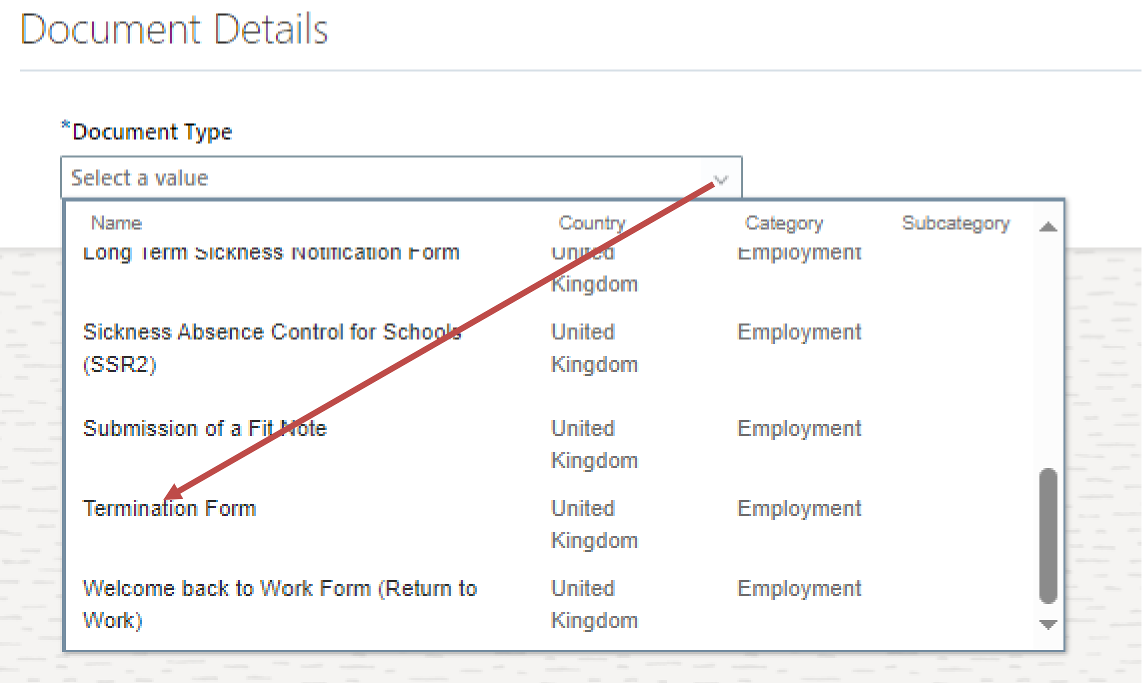
In the Details of Absence drop down, remember to link the correct absence to this document, you can search for absences if it doesn't automatically appear. Complete all fields where there is a mandatory *. If you have a signed document, attach it to the form as detailed above in 2.1, then press Submit.



2.3 Termination Form (Leavers)

This is to replace the VOG4 form.

To create a Termination form, access the 'My Team' area, click into Document Records via the three dot menu next to the relevant member of staff, and select Termination Form from the drop-down menu that appears from clicking the +Add button.



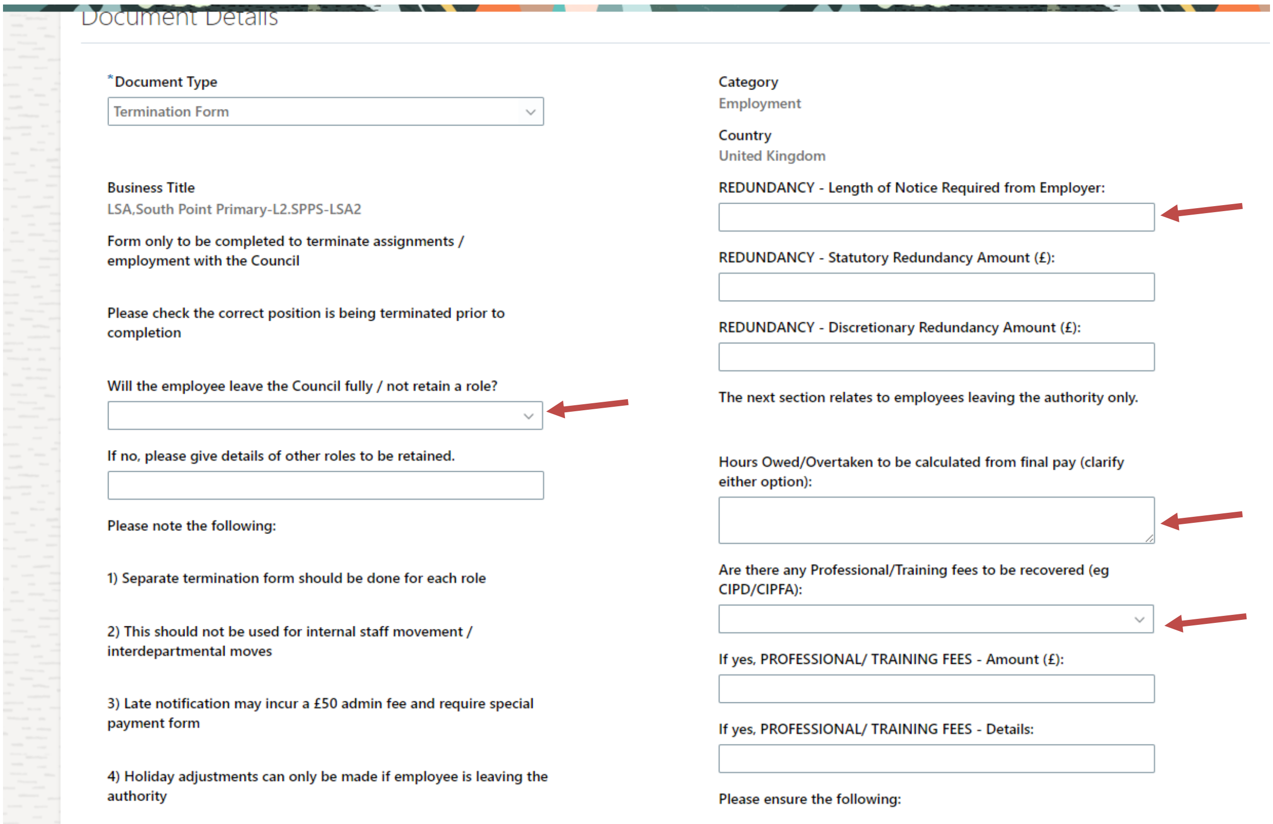
Document Details

*Document Type

Select a value

Name	Country	Category	Subcategory
Long Term Sickness Notification Form	United Kingdom	Employment	
Sickness Absence Control for Schools (SSR2)	United Kingdom	Employment	
Submission of a Fit Note	United Kingdom	Employment	
Termination Form	United Kingdom	Employment	
Welcome back to Work Form (Return to Work)	United Kingdom	Employment	

The fields are the same questions you are asked on a VOG4 form, remembering to ensure all fields are completed as required.



Document Details

*Document Type

Termination Form

Business Title

LSA,South Point Primary-L2.SPPS-LSA2

Form only to be completed to terminate assignments / employment with the Council

Please check the correct position is being terminated prior to completion

Will the employee leave the Council fully / not retain a role?

If no, please give details of other roles to be retained.

Please note the following:

1) Separate termination form should be done for each role

2) This should not be used for internal staff movement / interdepartmental moves

3) Late notification may incur a £50 admin fee and require special payment form

4) Holiday adjustments can only be made if employee is leaving the authority

Category

Employment

Country

United Kingdom

REDUNDANCY - Length of Notice Required from Employer:

REDUNDANCY - Statutory Redundancy Amount (£):

REDUNDANCY - Discretionary Redundancy Amount (£):

The next section relates to employees leaving the authority only.

Hours Owed/Overtaken to be calculated from final pay (clarify either option):

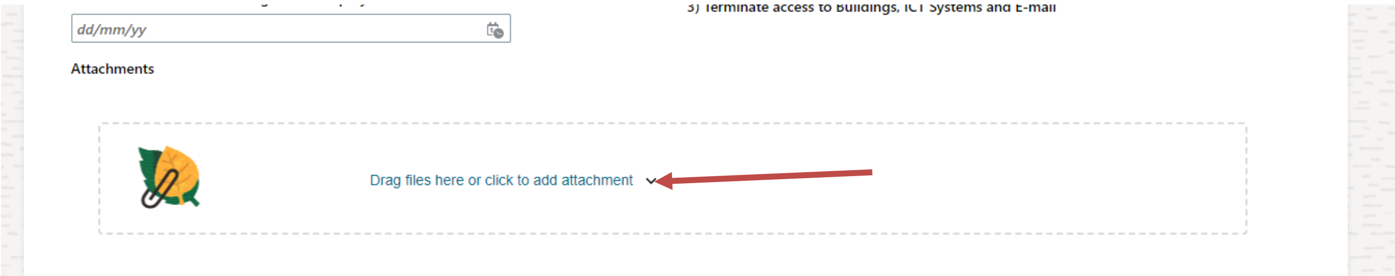
Are there any Professional/Training fees to be recovered (eg CIPD/CIPFA):

If yes, PROFESSIONAL/ TRAINING FEES - Amount (£):

If yes, PROFESSIONAL/ TRAINING FEES - Details:

Please ensure the following:

You can add a copy of the resignation letter here if you wish, by dragging in the file or uploading the document from a pathway.

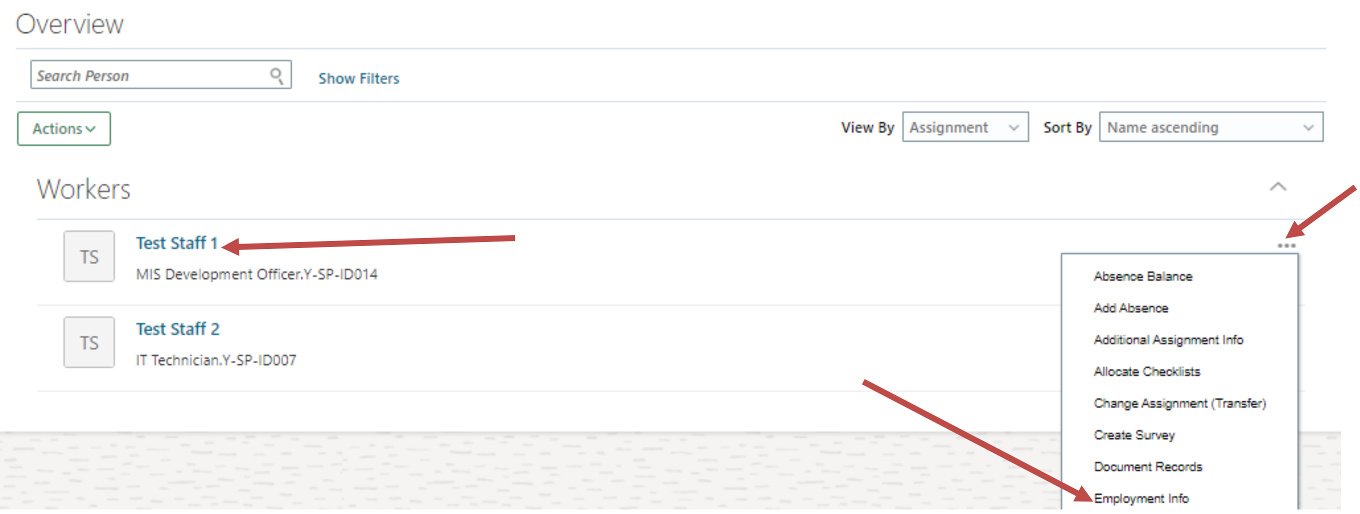


Once all fields are completed, click the Submit button at the top of the page to submit the form.

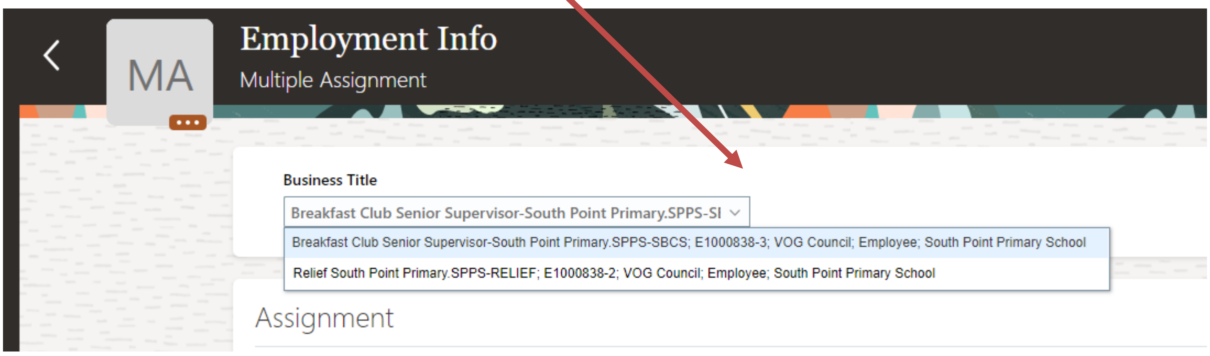
Please Remember: Termination forms need to be created for those leaving the organisation as well as those transferring from one role to another internally.

3.0 Checking Employment Information

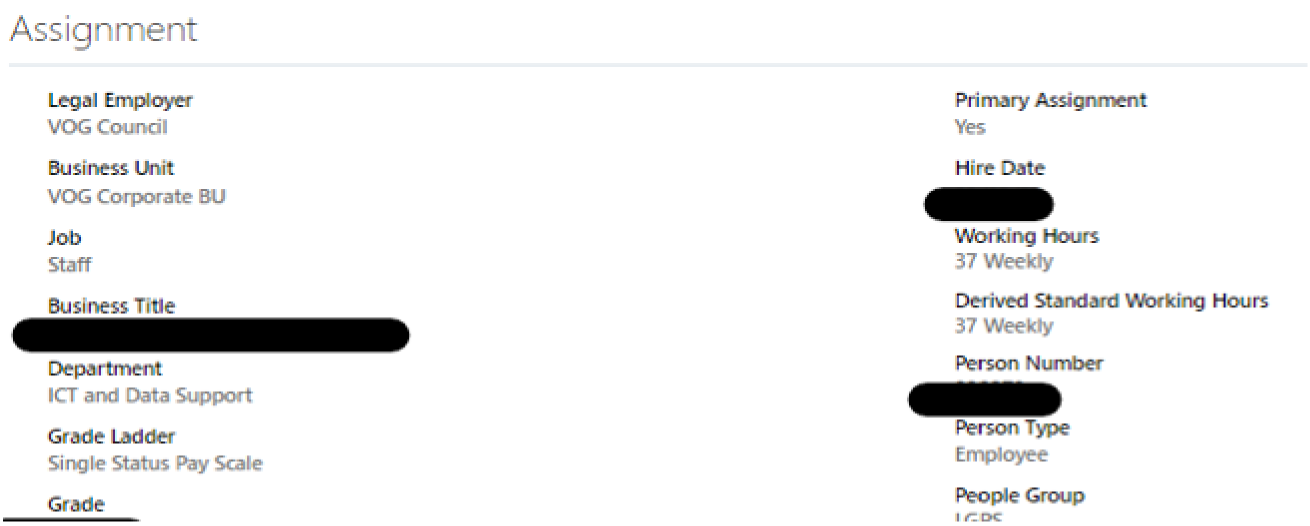
To enable you to view employment information for your team, you have a few options, you can either click on the blue name this will take you into the Employment Info screen, where you can see the current information at today's date, or you can select the three dots menu and select Employment Info.



If the person has more than one assignment with you, this will come up at the top of the Employment Info page for you to select the assignment you want. Click on the down arrow and select the appropriate position.



You can then view assignment information.



Assignment

Legal Employer
VOG Council

Business Unit
VOG Corporate BU

Job
Staff

Business Title
[redacted]

Department
ICT and Data Support

Grade Ladder
Single Status Pay Scale

Grade
[redacted]

Primary Assignment
Yes

Hire Date
[redacted]

Working Hours
37 Weekly

Derived Standard Working Hours
37 Weekly

Person Number
[redacted]

Person Type
Employee

People Group

Step
25

Include in grade step progression
Yes

Location
Civic Office

Position
MIS Development Officer.Y-SP-ID014

Assignment Number
[redacted]

Assignment Status
Active Assignment

Assignment Category
Full Time - Permanent

Full Time or Part Time

Permanent or Temporary

Worker Engagement Details

Uniformed grade

Standard Working Hours Override

Role Identifier

Weeks Worked

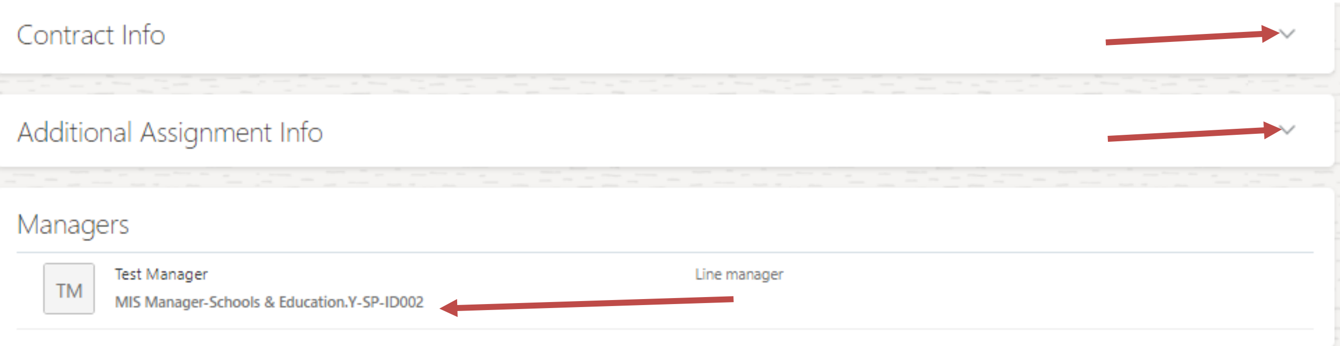
Employee Category
APTC

Contract Type
Salaried Staff

Contract End Date

Ceiling Step

You have the options to look further into Contract Info, Additional Assignment Info and details of the Manager.



Contract Info

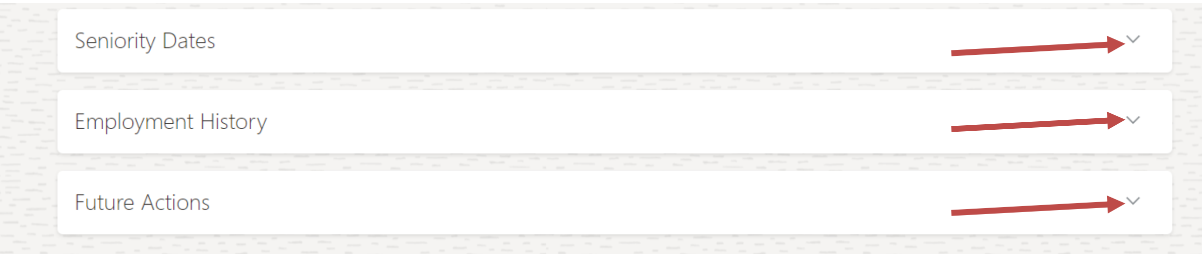
Additional Assignment Info

Managers

[redacted] Test Manager
MIS Manager-Schools & Education.Y-SP-ID002

Line manager

You also have the ability to double check any previous changes or future changes that may affect the change you wish to make at the bottom of the page. Click on the arrows to open the segment. If any future actions are scheduled, you need to check Future Actions to see what is happening in the future, you also need to check Employment history if you are making a change which is earlier than today's date.



In this instance, under the Employment History segment, there is a change of hours on 01.05.24. If you click on the blue Assignment Change you can see the details – see below

On the details of change page, you can see what was changed including before and after. If you want to make a change after 01.05.24 this is fine, but if you wanted to make a change before 01.05.24 you will need to change the record at the date you want, then again at 01.05.24.

Summary of Changes on 01/05/24

What Changed	After	Before
Reason Code	Change of hours	
Working Hours	10	6.25
Full-time equivalent	0.226496	0.14156
Change in Hours / Weeks Form		
I confirm employee information has been checked prior to co...	Yes	
New Hours (* For school cleaners, this is normal hours)	10	
Reason for change	need of service	
Does this increase the FTE established for this position?	No	
Is this change in hours due to Flexible Retirement?	No	
Uniquekey	240515025129	
Directorate	Learning and Skills - Schools*	

Also check the future changes.

Future Actions

Assignment Change	Start Date 01/06/24
Change of hours	Breakfast Club Senior Supervisor-South Point Primary.SPPS-SBCS
Last Updated By Sarah.Jeanes	Last Updated Date 15/05/24

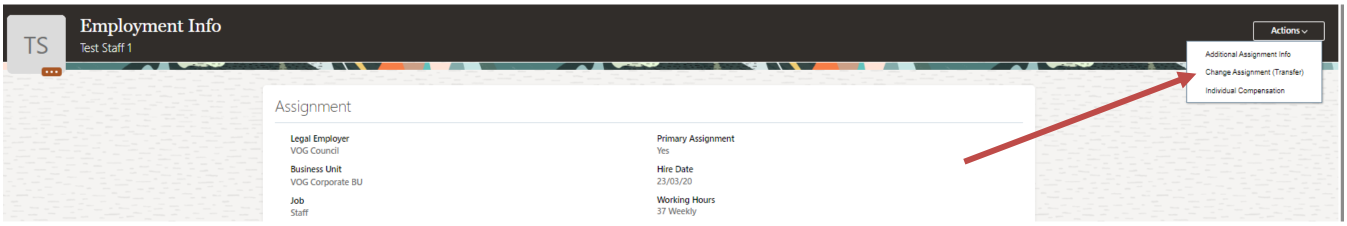
The example above shows another change of hours on 01.06.24. The blue writing will show you the detail of that change. If your new change is happening before 01.06.24 and overriding the change already stated, you will need to also make your change on 01.06.24.

If you do not check the changes already there, and make a backdated change, the system will revert to the change already there when it comes to 01.06.24.

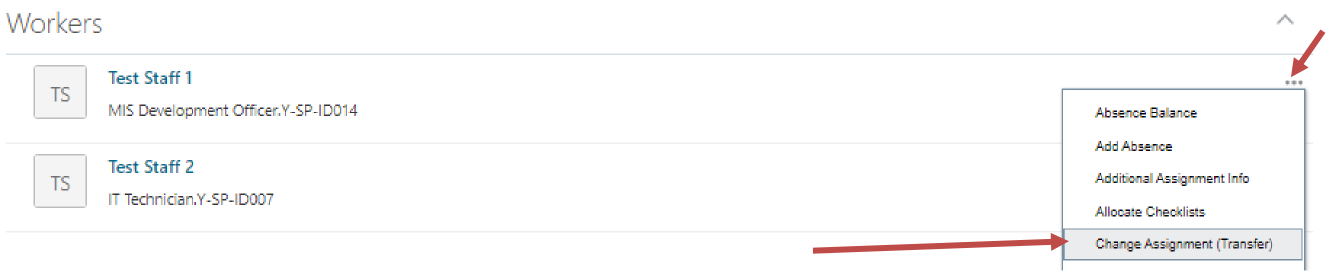
4.0 Change Assignment (Transfer)

Please Remember: most Change Assignment (Transfer) tasks will require delegated powers before amending the information on Fusion. Please attach signed delegated powers to the change assignment request you are creating if relevant in the comments section at the end of the flow.

Again, you have a few different ways to access this functionality. You can either access the Actions button while you are checking the Employment Info record as follows:



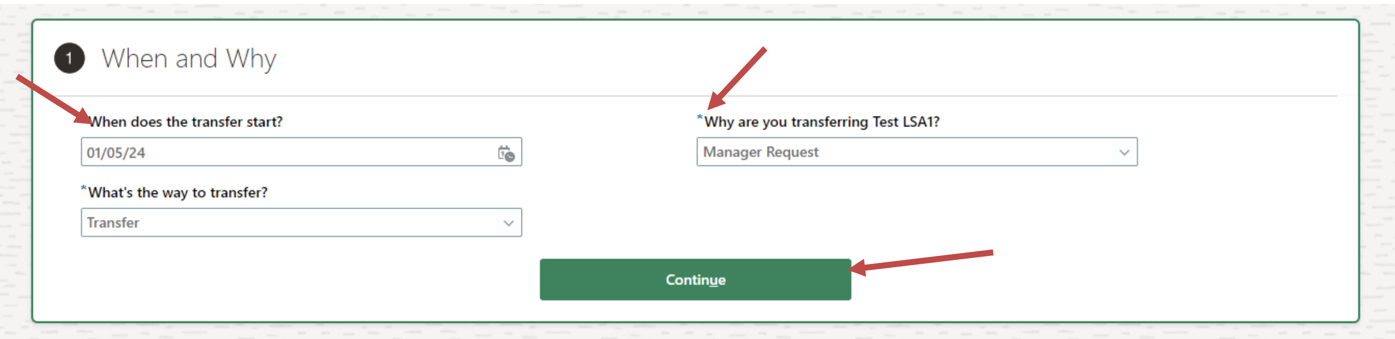
Or you can click into the three dots in the 'My Team' area and select Change assignment (Transfer)



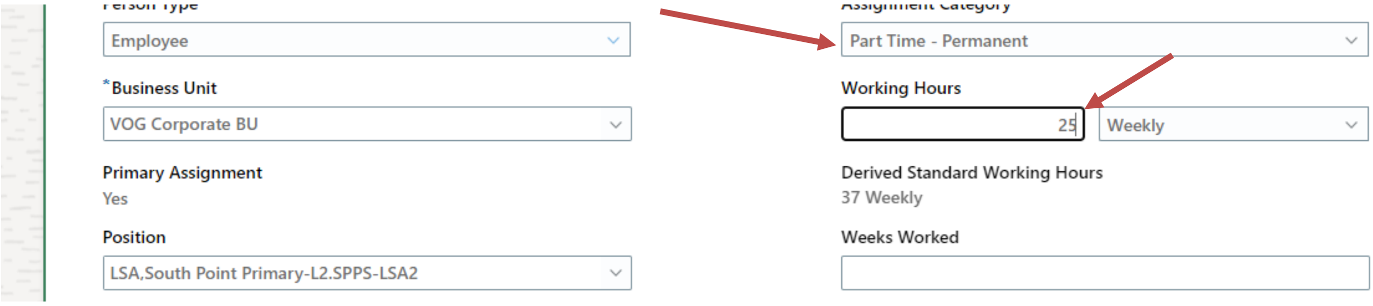
4.1 Change in hours

When you are ready to make the change, Click into Change Assignment (Transfer) using one of the above methods and follow the instructions below.

Complete the first section When and Why, selecting the appropriate date, then Transfer and Manager Request from the drop-down arrows. Click continue.

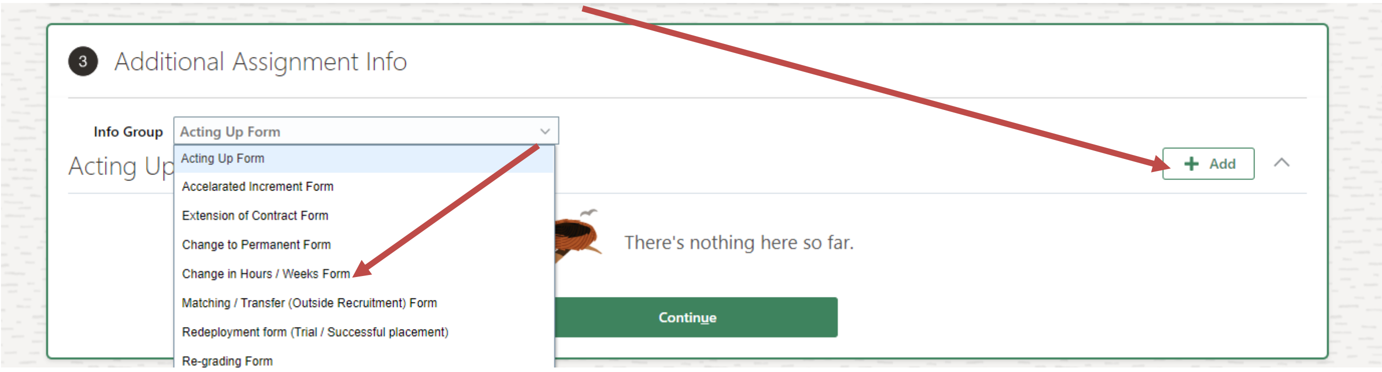


To change someone's working hours in Section 2 change the hours to the new hours, also update the Assignment Category field if required. Full Time (FT) is 37 hours for 52 weeks for support staff and 32.5hrs for Teaching staff. Otherwise, it is Part time and either permanent or temporary.

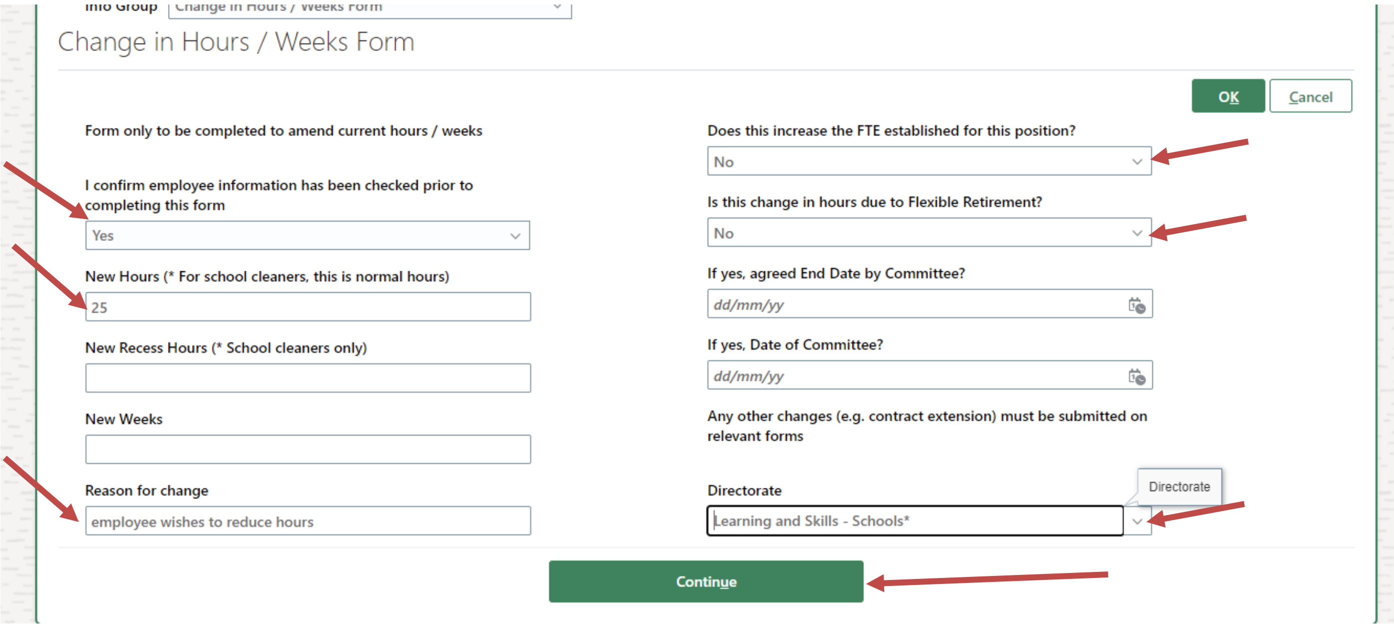


Click on the Continue button once the hours have been changed to move to the next section.

In Section 3, click on the drop-down arrow to see the lists of forms available, for example, select Change in Hours / Weeks Form and click the Add button on the right-hand side.



Complete the new fields that appear.



Please remember - it is important to always give us a reason and to always select the relevant Directorate. If the increase does increase the FTE for the established post it will need to go through delegated powers- and potentially a recruitment exercise.

Click the green Continue button.

Section 4 – Line Manager this should be you. Click Continue. If the line manager does need to be amended, please email the Fusion mailbox

Section 5 is Salary; you will note a change in salary happens with the change in hours. You do not need to worry about this, payroll will check it. So simply click Continue.

Section 6 is Comments and Attachments, you can attach/add something here if you wish, or just click on Submit at the top right of the page. If the change is temporary, please add the reason and end date in the comments for us to include in the letter to the staff member.

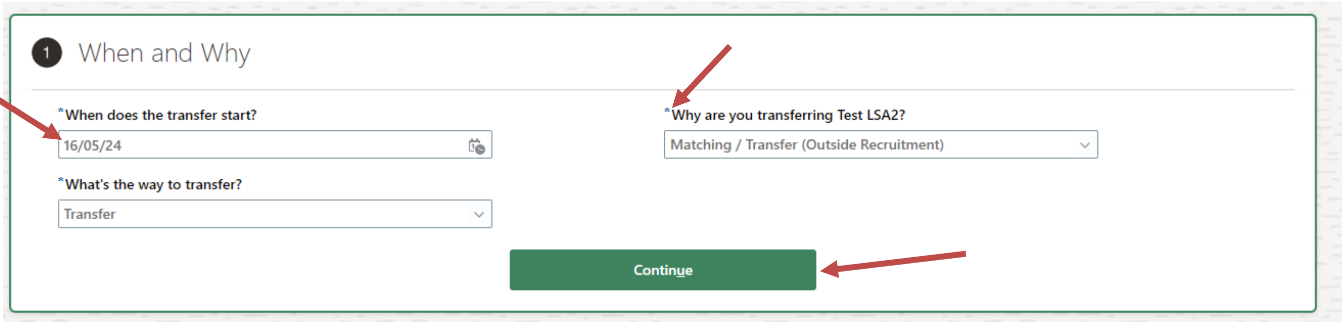
Please remember: There is a formal process to follow for flexible working requests. Please contact your HR Business Parter to discuss.

4.2 Change of job

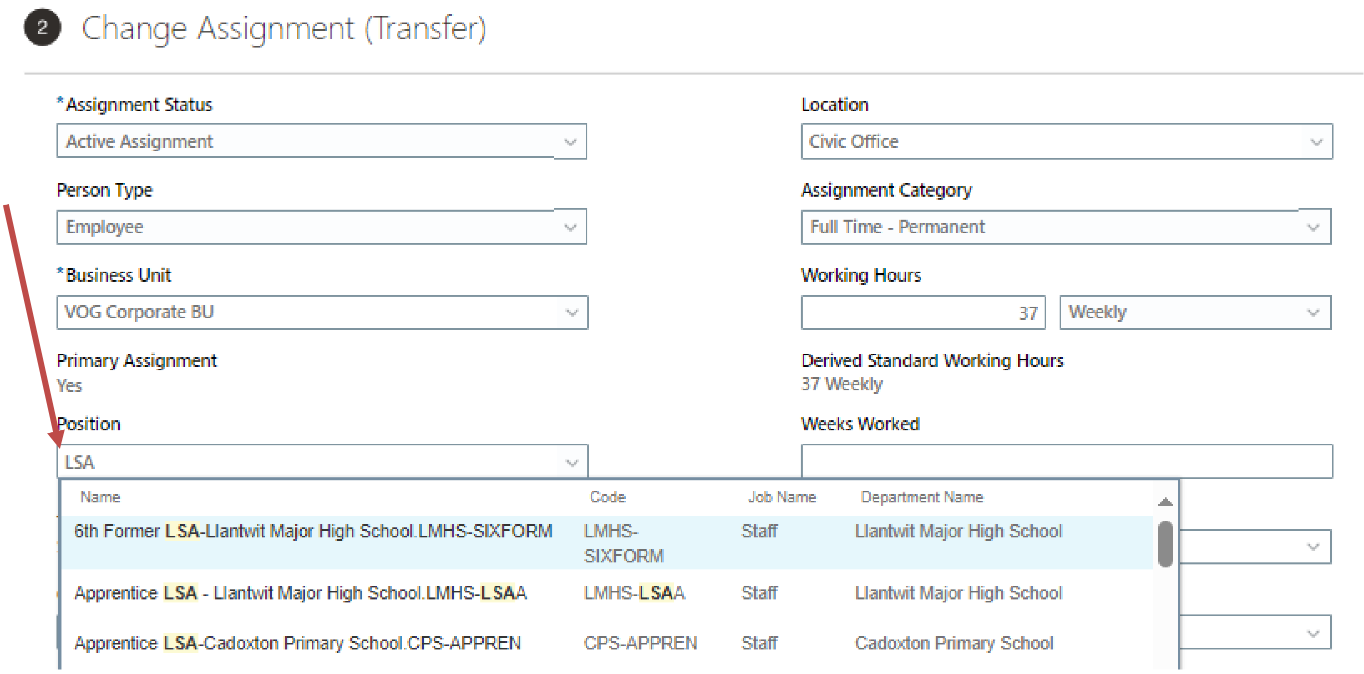
Check Employment Information, as shown is section 3.0, to ensure the details are correct before amending.

When you are ready to make the change, access Change Assignment (Transfers) by using one of the above methods and follow the instructions below.

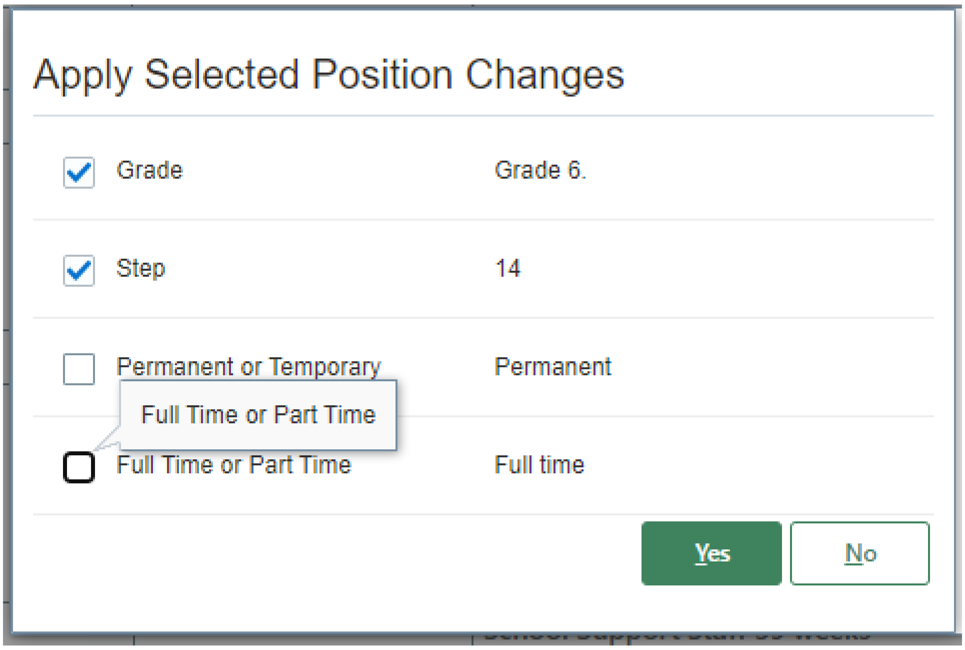
Complete the first section When and Why, selecting the appropriate date, then Transfer and Matching/Transfer (outside recruitment) from the drop-down options. Click the Continue button.



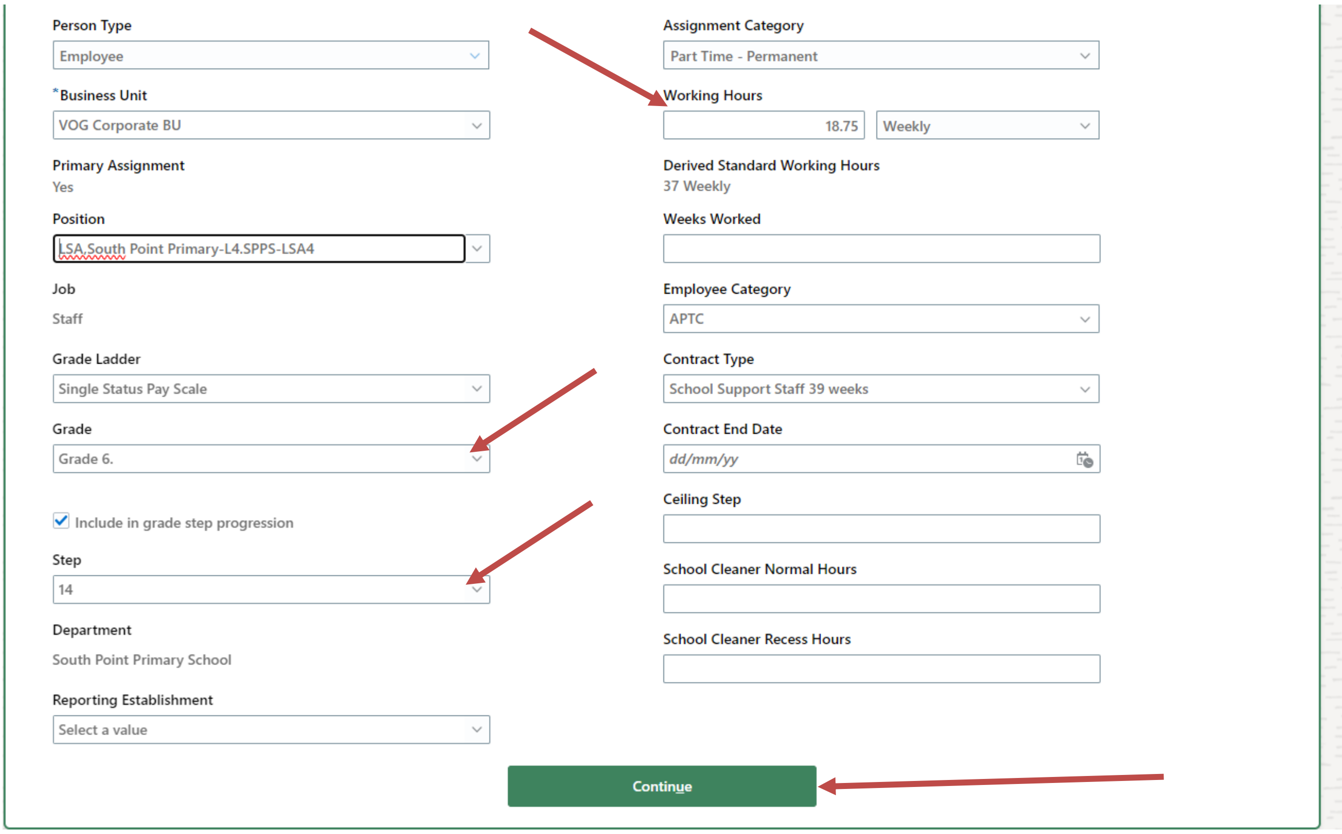
Section 2 – now you need to select the new position. The trick here is to start typing, type the post name, i.e. LSA, Business Support Officer, Social Care Officer, etc then the relevant details will appear, select the correct one from the list ensuring it's the correct post reference.



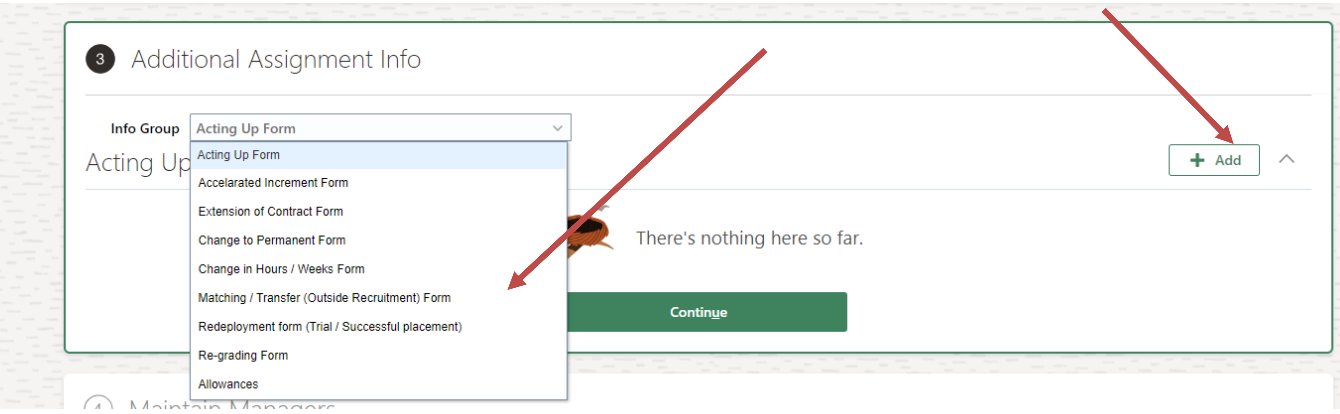
When you select the post, the box below comes up, always take the ticks out of Permanent or Temporary and Full time. This means the assignment will remain whatever it currently is. Click the Yes button.



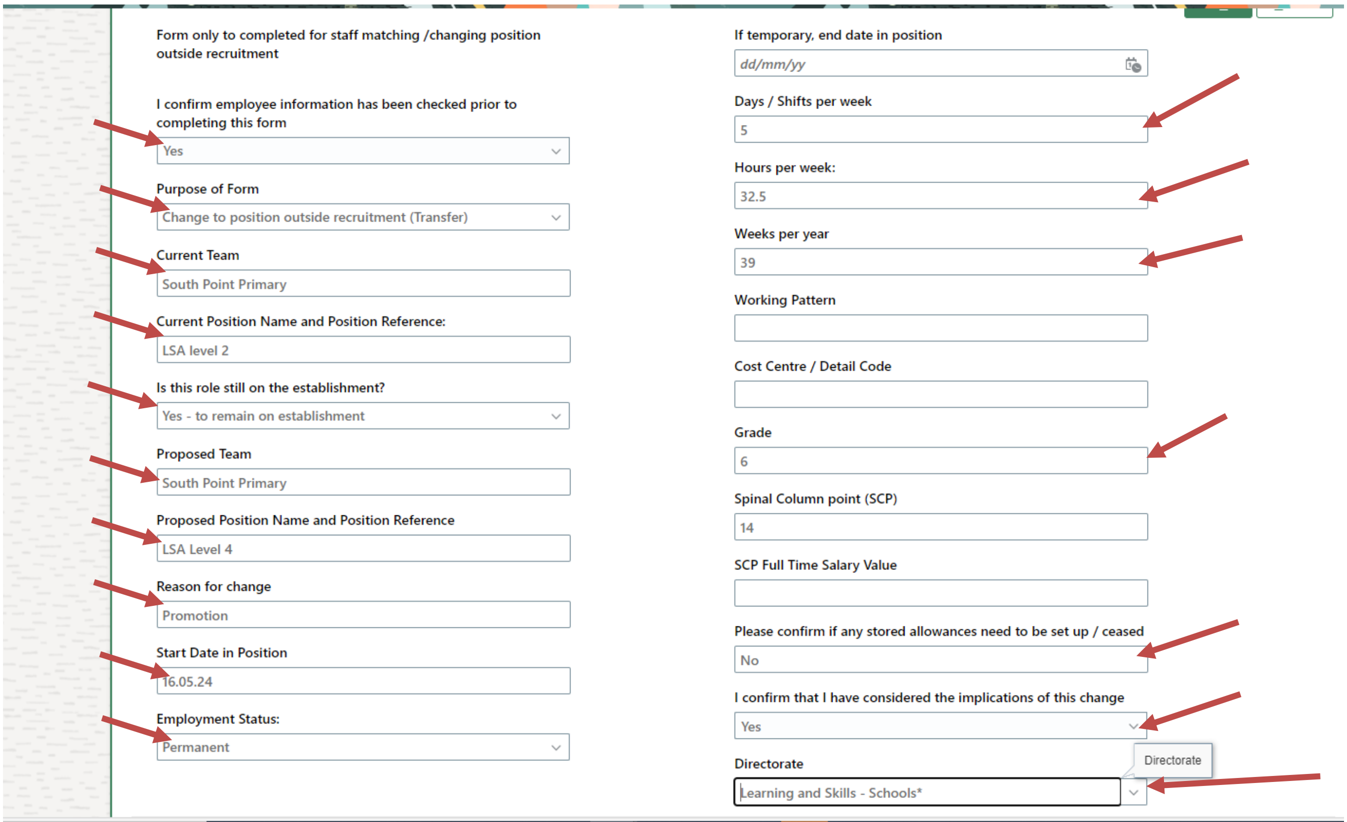
You will note the system knows the LSA level 4 post is on Grade 6 and the person is going to be started at step 14 which is the first point on the scale. If the hours are going to be different, please change these and click Continue.



On Section 3, click on the drop-down arrow and select Matching/Transfer (Outside recruitment) form, this replaces the VOG39 Internal Transfer form and then click the +Add button.



Complete the form as you would have done on a VOG39. Completing these fields helps us with doing a etter for the staff member. Remember to always select the directorate at the bottom.



Form only to completed for staff matching /changing position outside recruitment

I confirm employee information has been checked prior to completing this form

Yes

Purpose of Form

Change to position outside recruitment (Transfer)

Current Team

South Point Primary

Current Position Name and Position Reference:

LSA level 2

Is this role still on the establishment?

Yes - to remain on establishment

Proposed Team

South Point Primary

Proposed Position Name and Position Reference

LSA Level 4

Reason for change

Promotion

Start Date in Position

16.05.24

Employment Status:

Permanent

If temporary, end date in position

dd/mm/yy

Days / Shifts per week

5

Hours per week:

32.5

Weeks per year

39

Working Pattern

Cost Centre / Detail Code

Grade

6

Spinal Column point (SCP)

14

SCP Full Time Salary Value

Please confirm if any stored allowances need to be set up / ceased

No

I confirm that I have considered the implications of this change

Yes

Directorate

Learning and Skills - Schools*

Directorate

Click OK at the top of the form when done and continue to move to the next section.

Section 4 – Line Manager this should be you. Click Continue. If not, please email the Fusion mailbox

Section 5 is Salary; you will note a change in salary happens with the change in grade. You do not need to worry about this, payroll will check it. Click Continue.

Section 6 is comments and attachments, you can attach/add something here if you wish, or just click on Submit at the top of the page. If the change is temporary, please add the reason and end date in the comments for us to include in the letter to the staff member.

The page will close once it is submitted. It will then go to the next level for approval, normally this will be payroll.

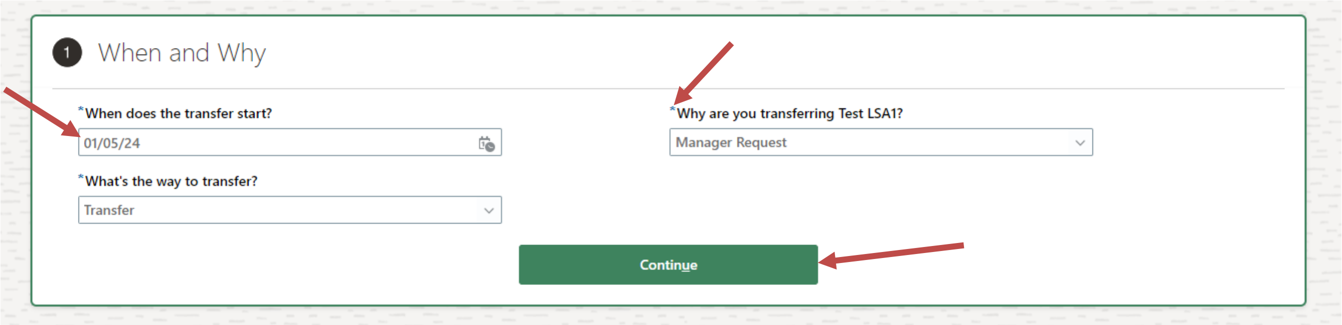
Please Remember: if you are dealing with a transfer to another service area. You will need to check with the new Team which post you need to put them in. Pop them in this post without changing anything else and submit. Then ask the new Team to make any changes to grade/hours/allowances and Submit.

4.3 Extension of Temporary Contract

Check Employment Information, as shown is section 3.0, to ensure details are correct before the change.

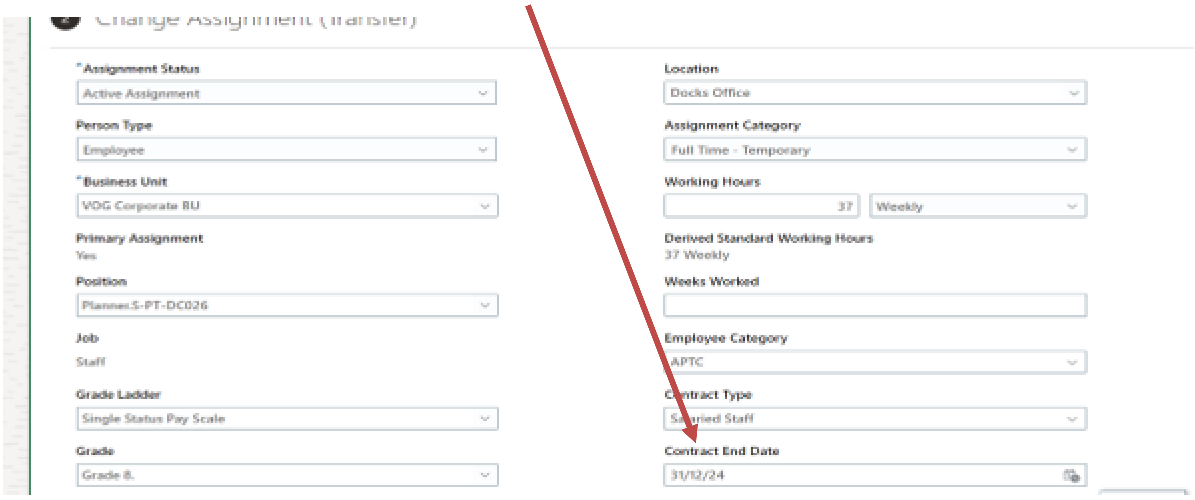
When you are ready to make the change, access Change Assignment (Transfers) by using one of the above methods and follow the instructions below.

Complete the 1st section When and Why, selecting the appropriate date, then Transfer and Manager request from the drop-don options. Click the Continue button.

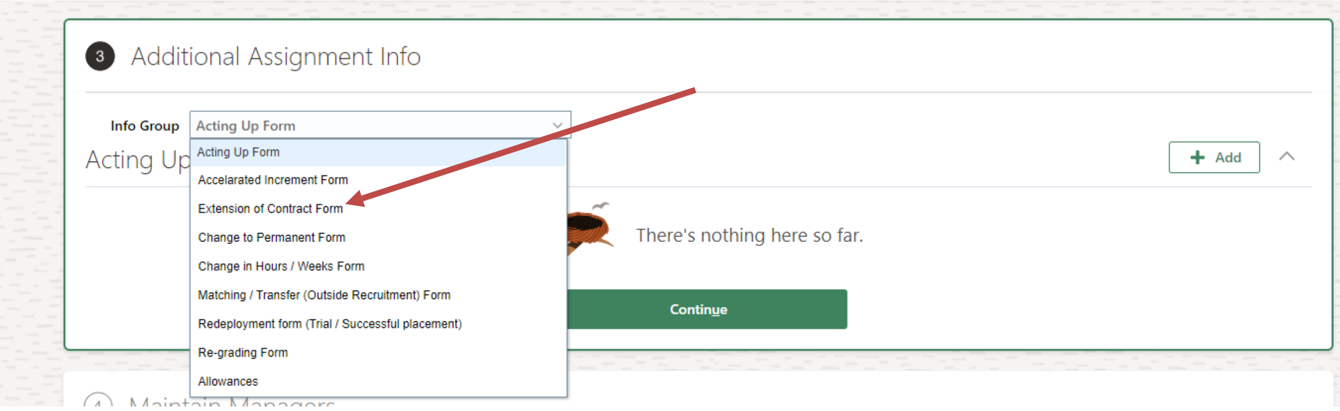


Section 2

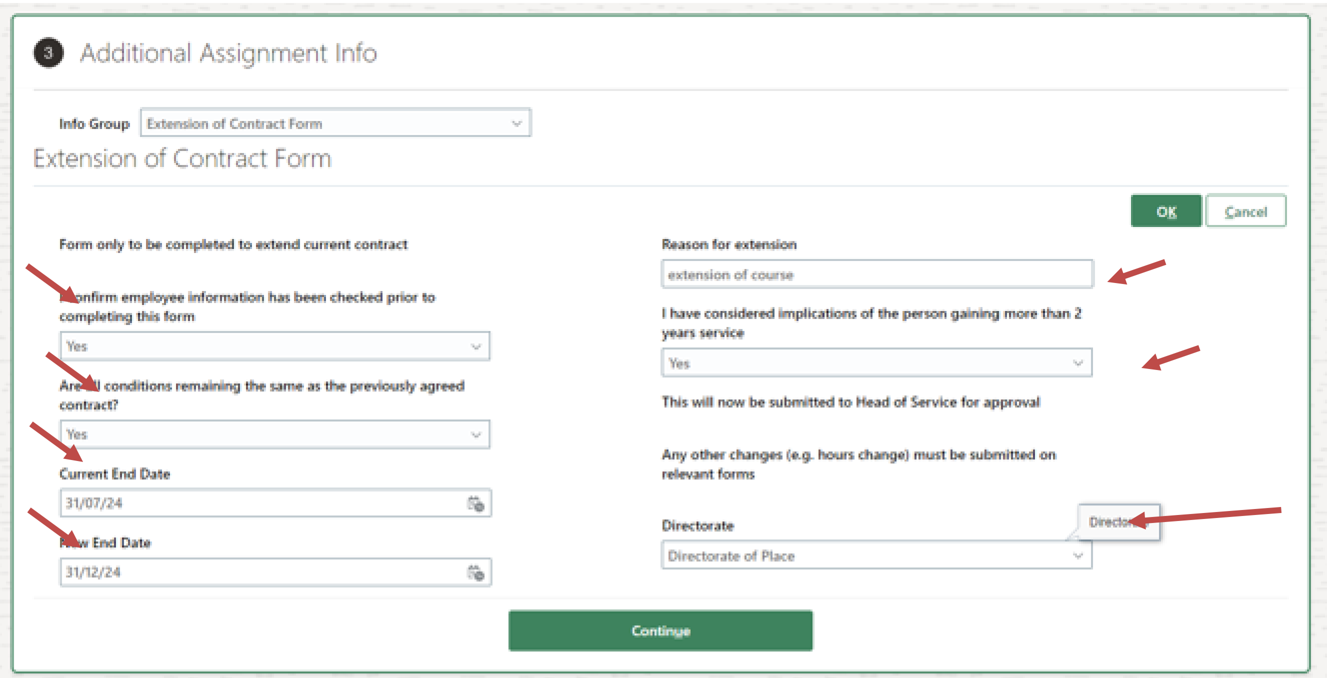
If you are extending a temporary contract, delegated powers is likely to be required. Just find the contract end date field and enter the new end date, this one has been extended to 31.12.24 click on continue.



Select Extension of Contract Form and the +Add button on the right-hand side.



Complete the form as appropriate.



Click OK at the top of the form when done and continue to move to the next section.

Section 4 – Line Manager this should be you. Click Continue. If not, please email the Fusion mailbox

Section 5 is Salary; you will note a change in salary happens with the change in grade. You do not need to worry about this, payroll will check it. Click Continue.

Section 6 is comments and attachments, you can attach/add something here if you wish, or just click on Submit at the top of the page.

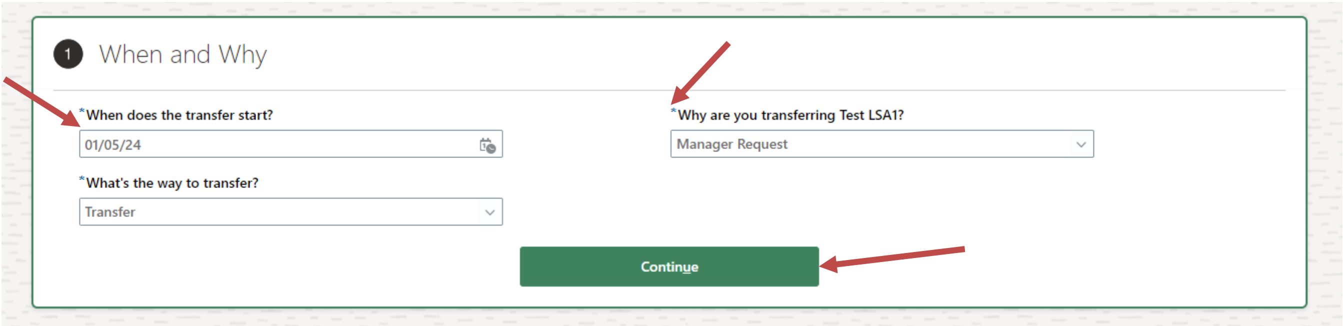
The page will close once it is submitted. It will then go to the next level for approval, normally this will be payroll.

4.4 Making someone Permanent

Check Employment Information, as shown is section 3.0, to ensure details are correct before the change.

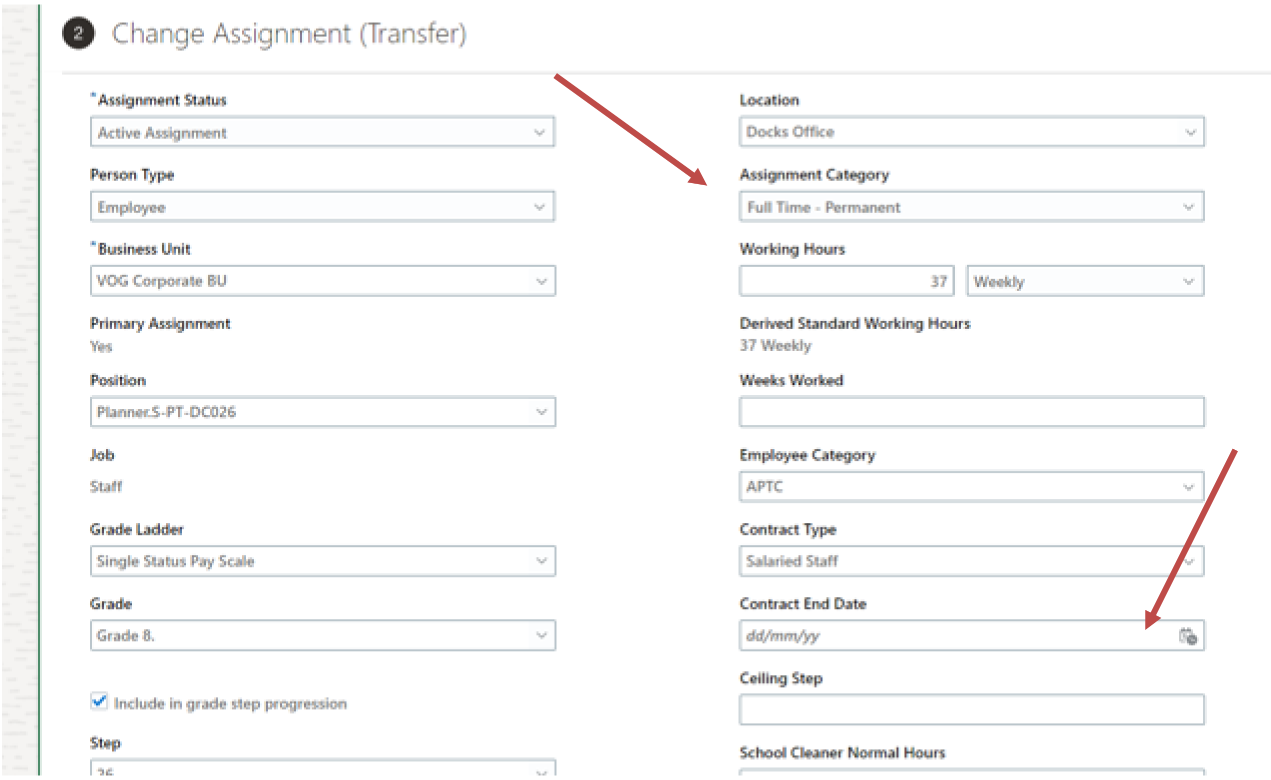
Once you've obtained delegated powers sign off and following recruitment, access Change Assignment (Transfers) by using one of the above methods and follow the instructions below.

Complete the 1st section When and Why, selecting the appropriate date, then Transfer and Manager request from the drop-down options. Click Continue.



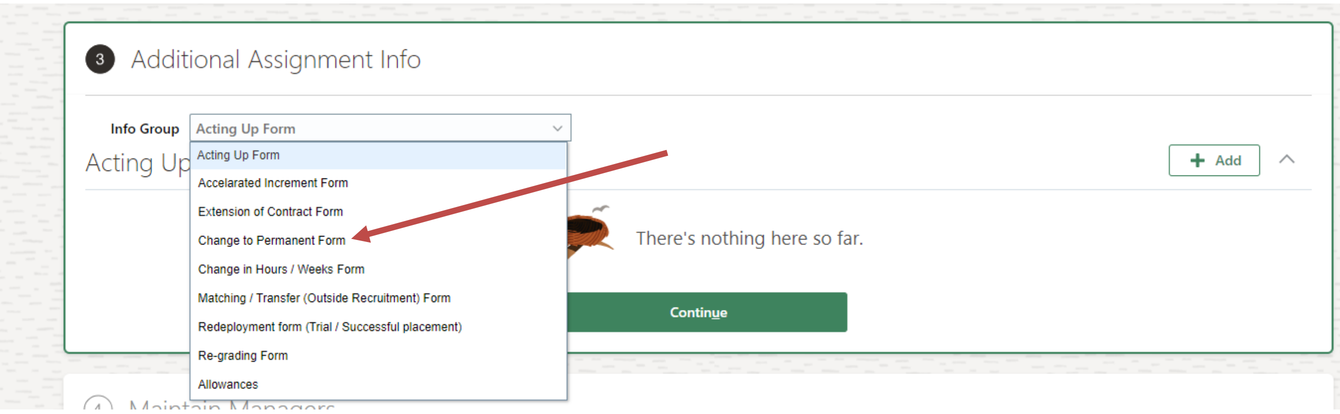
Section 2

If you are making someone permanent after temporary. Remove the Contract end date. Also change the assignment category to Part Time (or Full time if 37 hours support or 32.5hrs Teacher) Permanent.

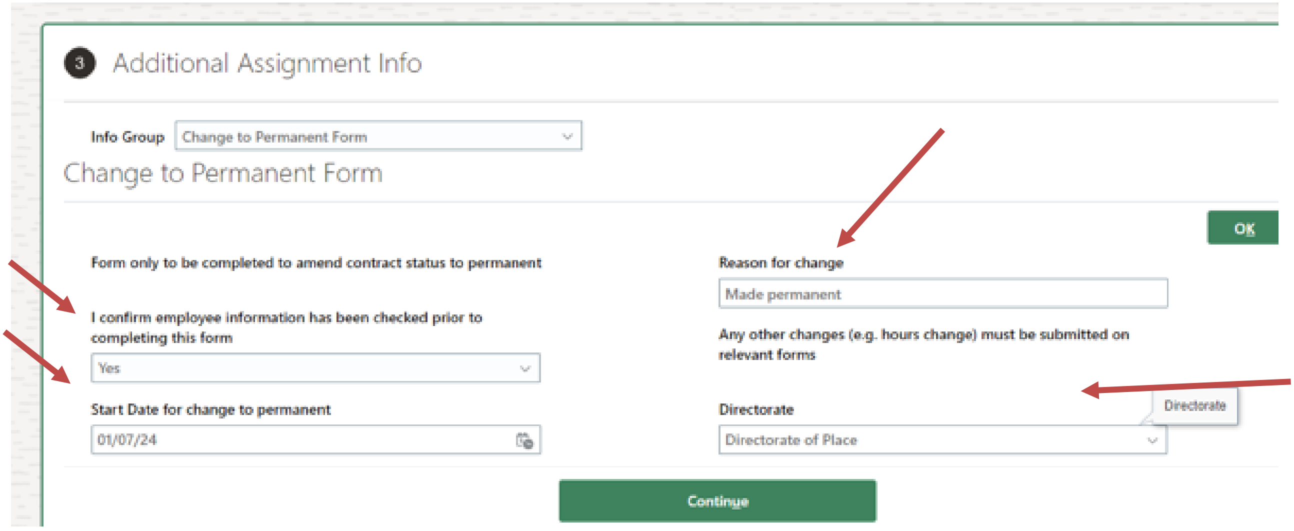


Click Continue.

In Section 3, click on the drop-down arrow and select Change to Permanent Form (for making permanent) and click the +Add button.



Complete the form as appropriate.



Click OK at the top of the form when done and continue to move to the next section.

Section 4 – Line Manager this should be you. Click Continue. If not, please email the Fusion mailbox

Section 5 is Salary; you will note a change in salary happens with the change in grade. You do not need to worry about this, payroll will check it. Click Continue.

Section 6 is comments and attachments, you can attach/add something here if you wish, or just click on Submit at the top of the page. If the change is temporary, please add the reason and end date in the comments for us to include in the letter to the staff member.

The page will close once it is submitted. It will then go to the next level for approval, normally this will be payroll.

4.5 Withdraw a Change Assignment Transfer

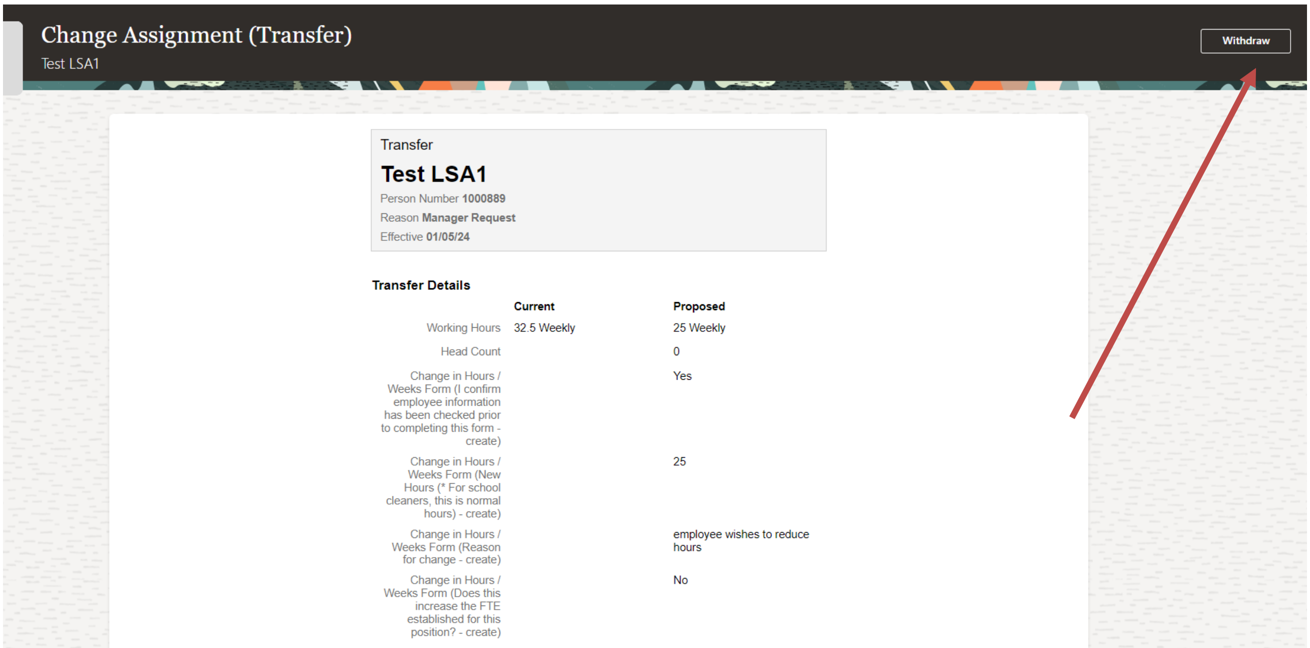
If you have submitted a change by mistake, there is still time to withdraw this before it is approved.

Go into Employment Information for the person you submitted the change on.

Click on Actions and Change Assignment (transfer) you will see this screen.

Click on the blue writing to see how it's going.

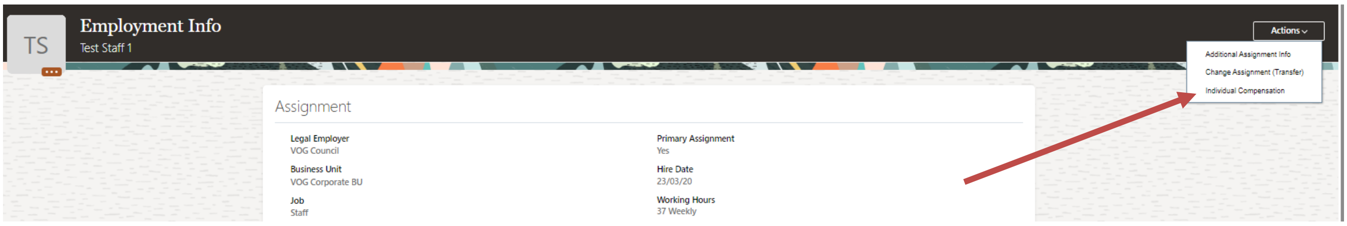
It will show you the approval waiting, you can either scroll down to the bottom of the screen under Approvers to show detail to see where this is sitting (it will usually be payroll). Or if you need to withdraw it click on the withdraw button in the top left corner.



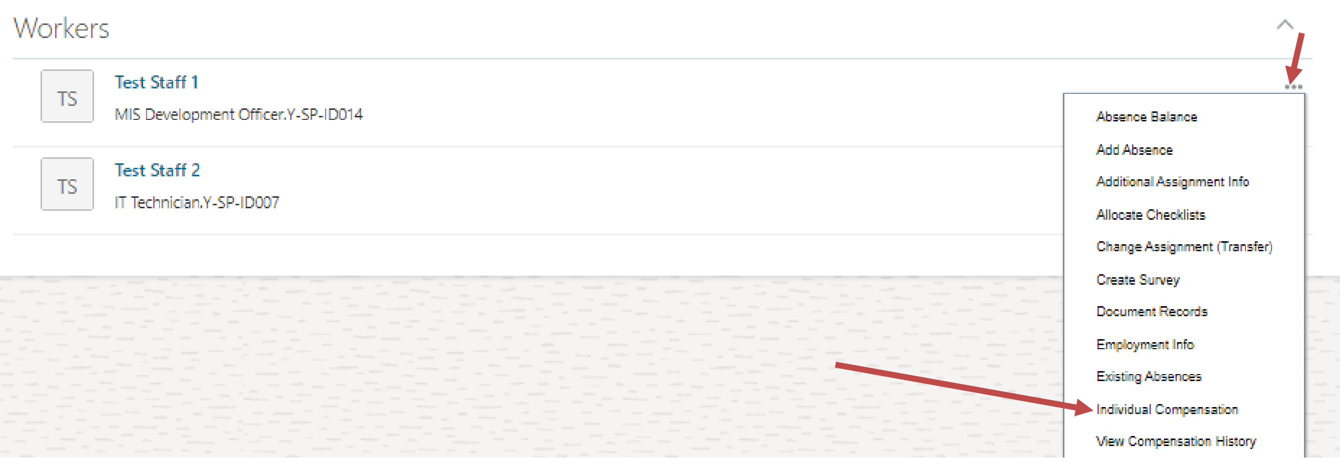
The screen will go back to My team once it is withdrawn. To check, you can now go back into employment Information, select Actions and Change Assignment (transfer) and see there is no longer something waiting. The form will be available again to either Submit the correct change or Cancel if no change is required.

5.0 Allowances

Again, you have a few different ways to access this functionality. You can either access the Actions button while you are checking the Employment Info record as follows:



Or you can click into the three dots in the 'My Team' area and select Individual Compensation.



5.1 Individual Compensation

Check Employment Information, as shown is section 3.0, to ensure details are correct before the change.

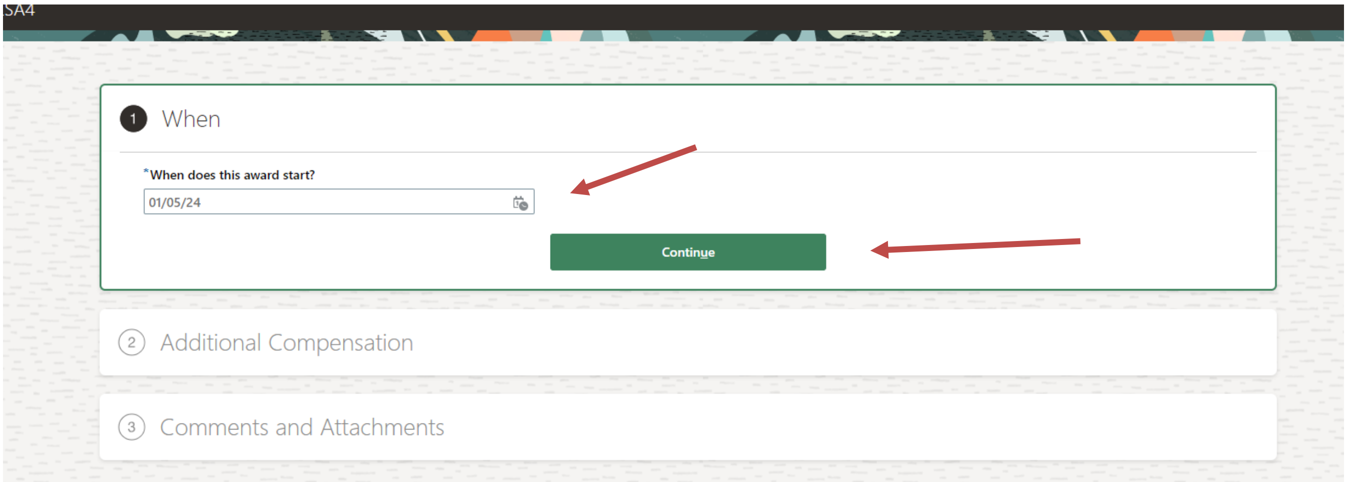
When you are ready to make the change, access Individual Compensation by using one of the above methods and follow the instructions below.

Individual Compensation can be awarded by managers to staff for the following reasons:

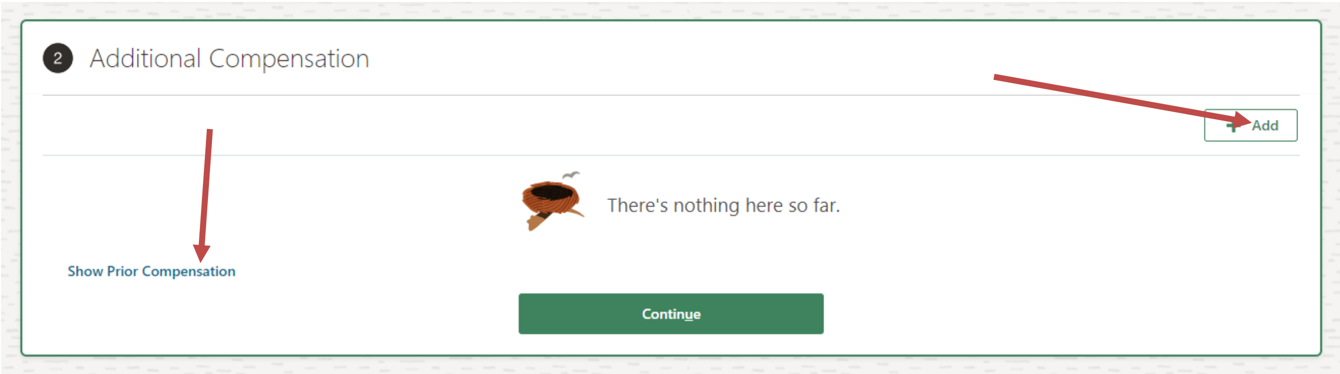
- Awarding additional leave balances – Update balance
- First Aid allowances
- Fire Warden allowances
- Honararia's
- Market Supplements
- Mental Health allowances

- Protection allowances
- SEN allowances

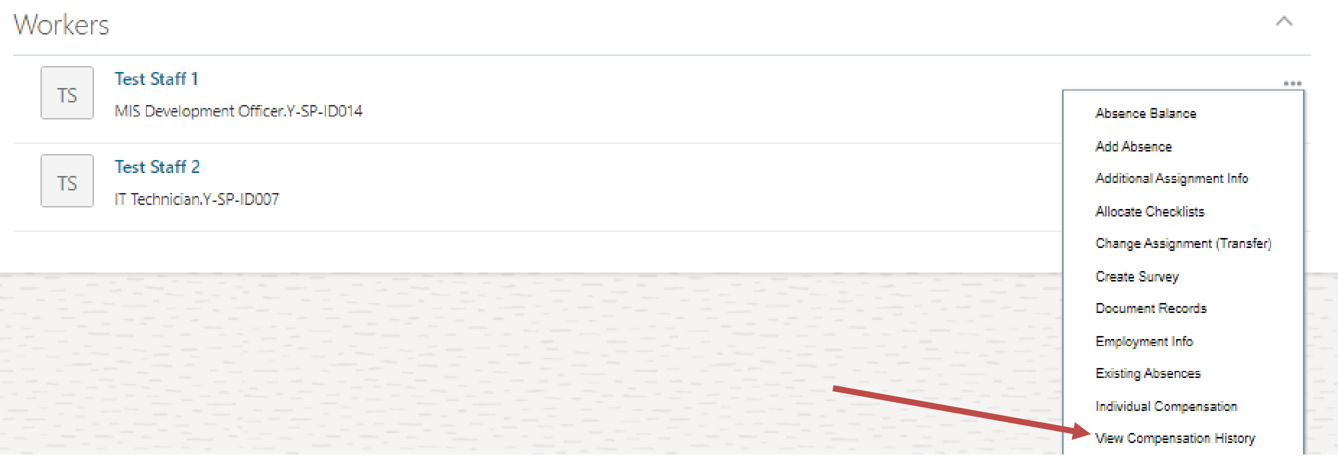
Select the date in Section 1 – this should be either the date you want to start an allowance, or the last day the person should receive the allowance if you are ending one. Click the Continue button to move to the next section.



Click on Show Prior Compensation in blue if you want to see any historical information on allowances. Click +Add to add a new allowance.



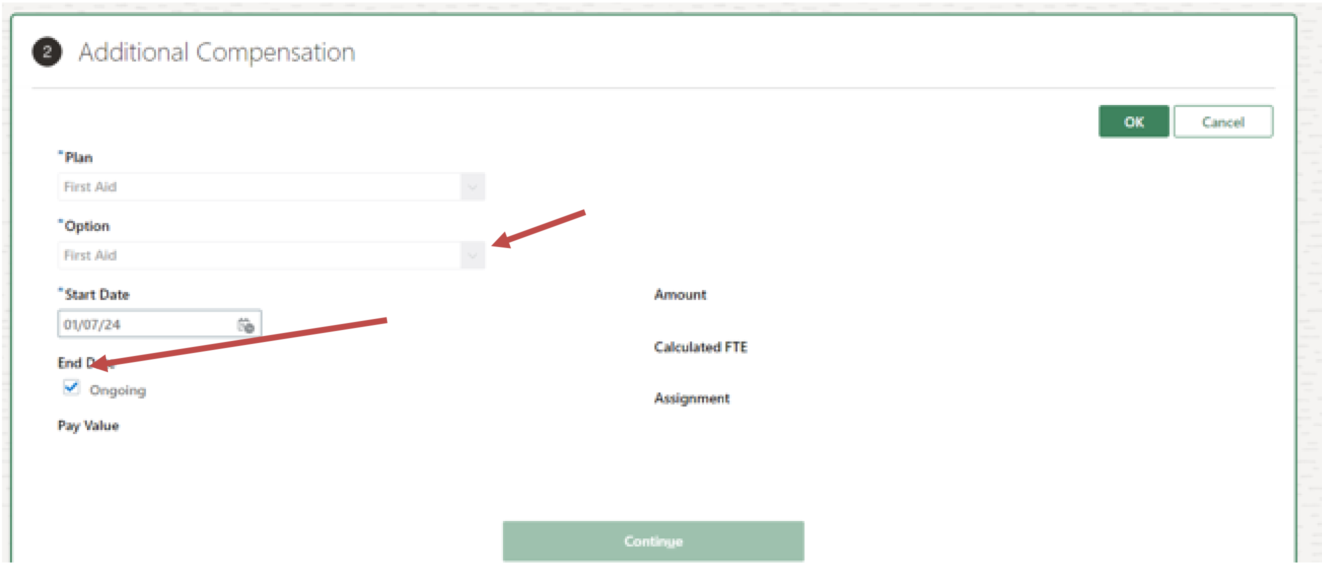
You can also view compensation history by clicking the 3 dots in 'My Team' and accessing View Compensation History.



Click on the drop-down arrow under Plan and select the allowance you require. In this case we are going to select First Aid. You will note there is one called First Aid – this will pay based on £300 x FTE.

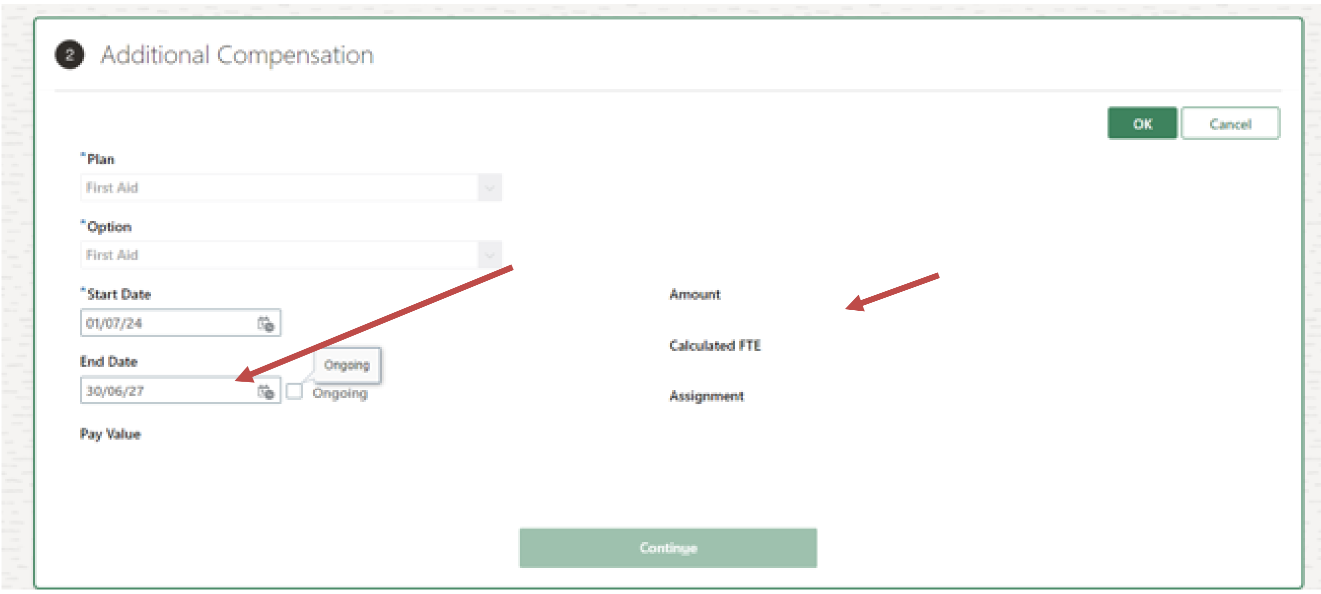
In this example I am going to select First Aid. Once you select Plan, go to the next Option drop-down box and there will only be one item there for you to select i.e First Aid. This then opens the details. The Start date is populated on the date you entered in Section 1.

If the allowance is ongoing, you can leave the tick in the Ongoing box. If it is a temporary allowance, such as First Aid which is only valid for 3 years, you need to take the tick out of the box.



This then gives you the end date box.

Enter the end date (no longer than 3 years). With First Aid you do not need to enter an amount as this is set council wide. For some allowances you will need to enter the amount and this should always be the full-time annual amount, the system will pay a pro rata amount to Part Time (PT) staff. Click the OK button at the top right of the screen. Then click Continue.



In Section 3 you can add any comments. Then click on Submit at the top right of the screen.

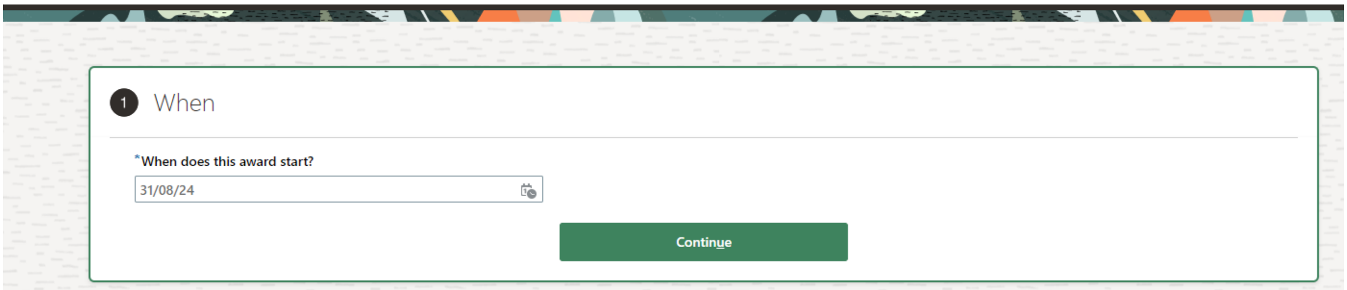
The screen will close once this is submitted.

5.2 End of allowance

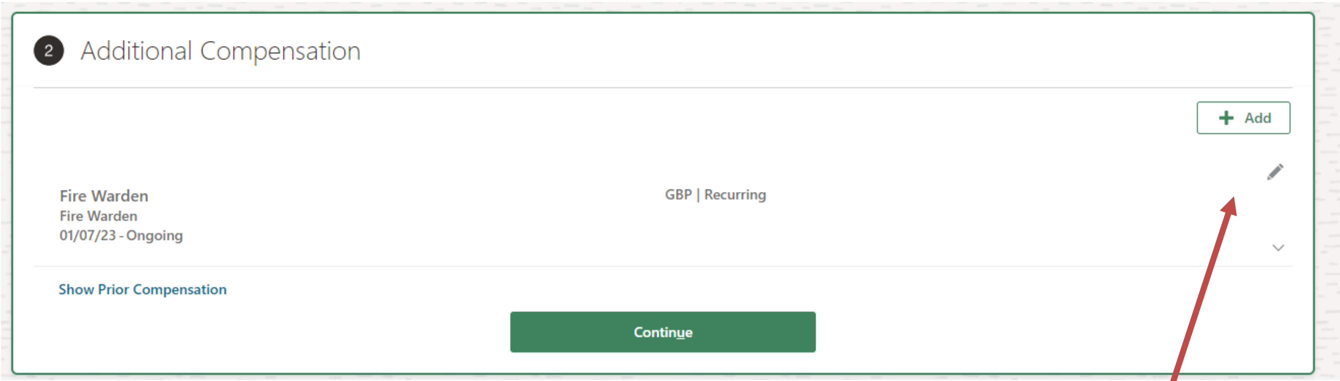
Check Employment information, as shown is section 3.0.

When you are ready to make the change, access Individual Compensation by using one of the above methods and follow the instructions below.

Enter the date you want to end the allowance.

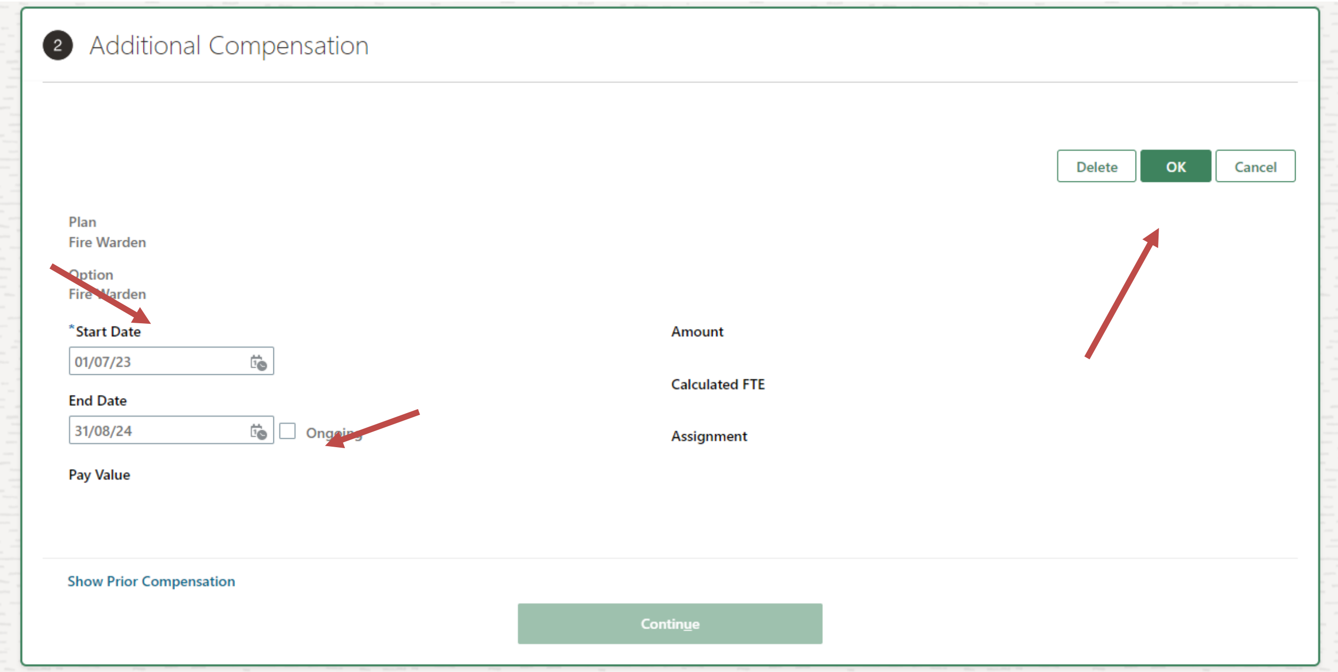


Click on continue.

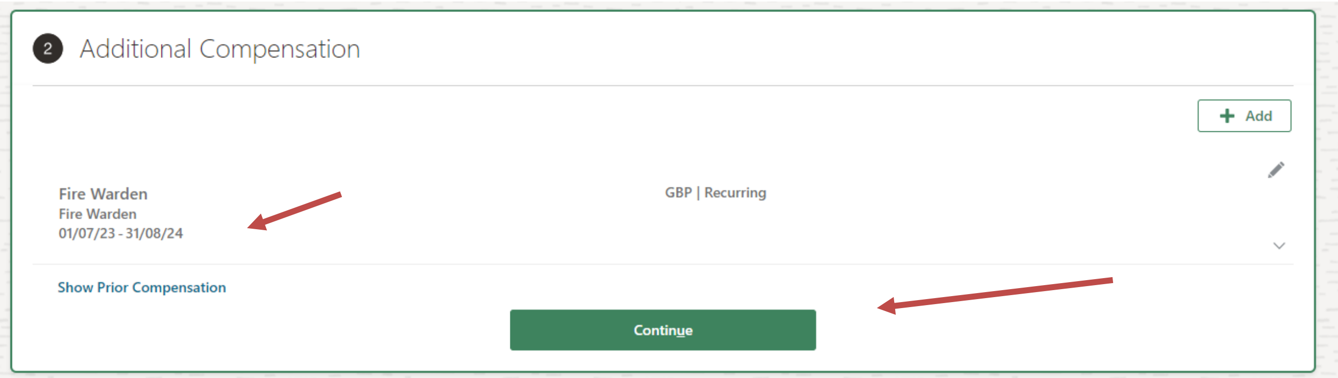


Any current allowances will show in Section 2. Click on the pencil picture to edit it.

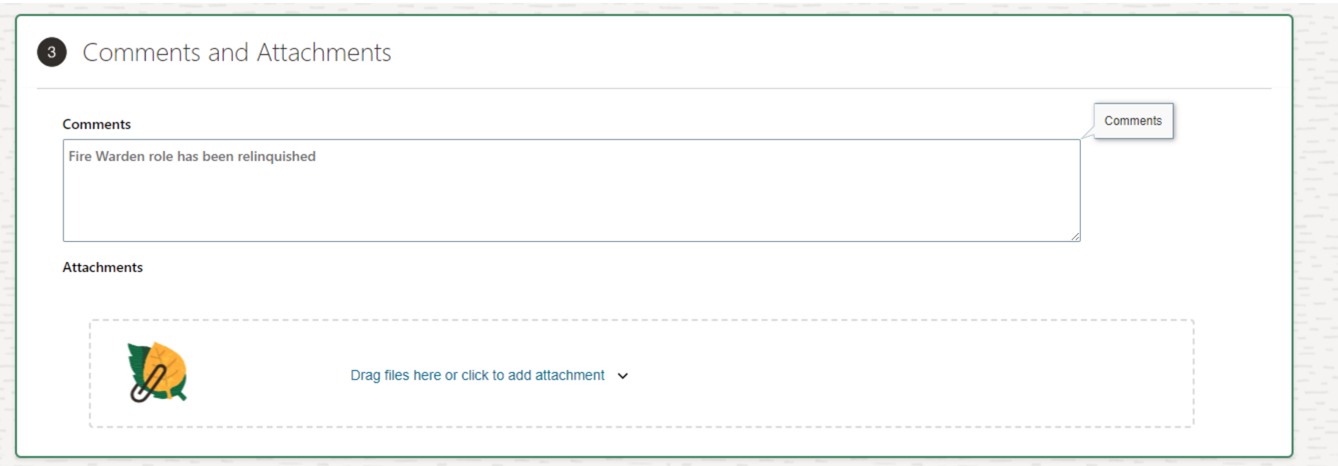
Take the tick out of the box which says end date ongoing, the end date box will then appear. Enter your end date (the last day for payment of the allowance). Click OK



You will now see a summary of the information, double check your end date is there. Click on continue.



Add any comments or attachments you wish.



Click on submit at the top left of the page.

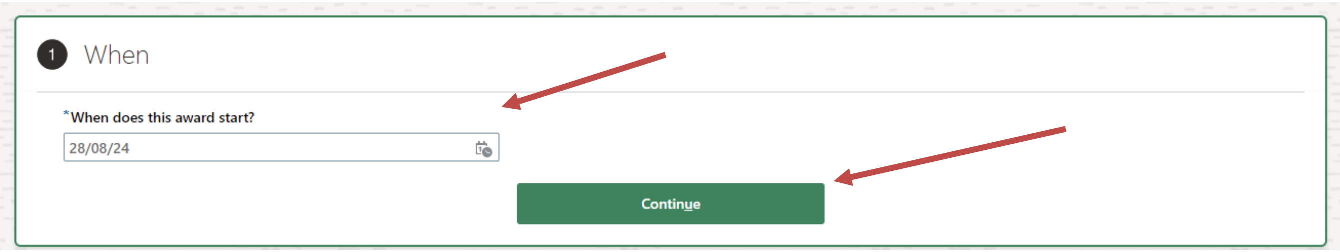
Page will close when it has been submitted.

5.3 Amending a previously submitted allowance

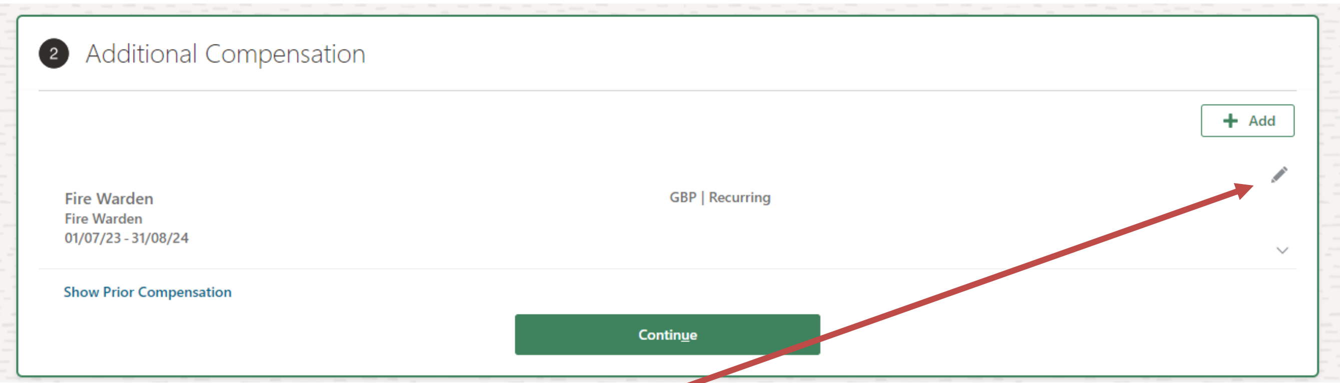
Check Employment information, as shown is section 3.0.

When you are ready to make the change, access Individual Compensation by using one of the above methods and follow the instructions below.

Enter today's date in section 1 and click Continue

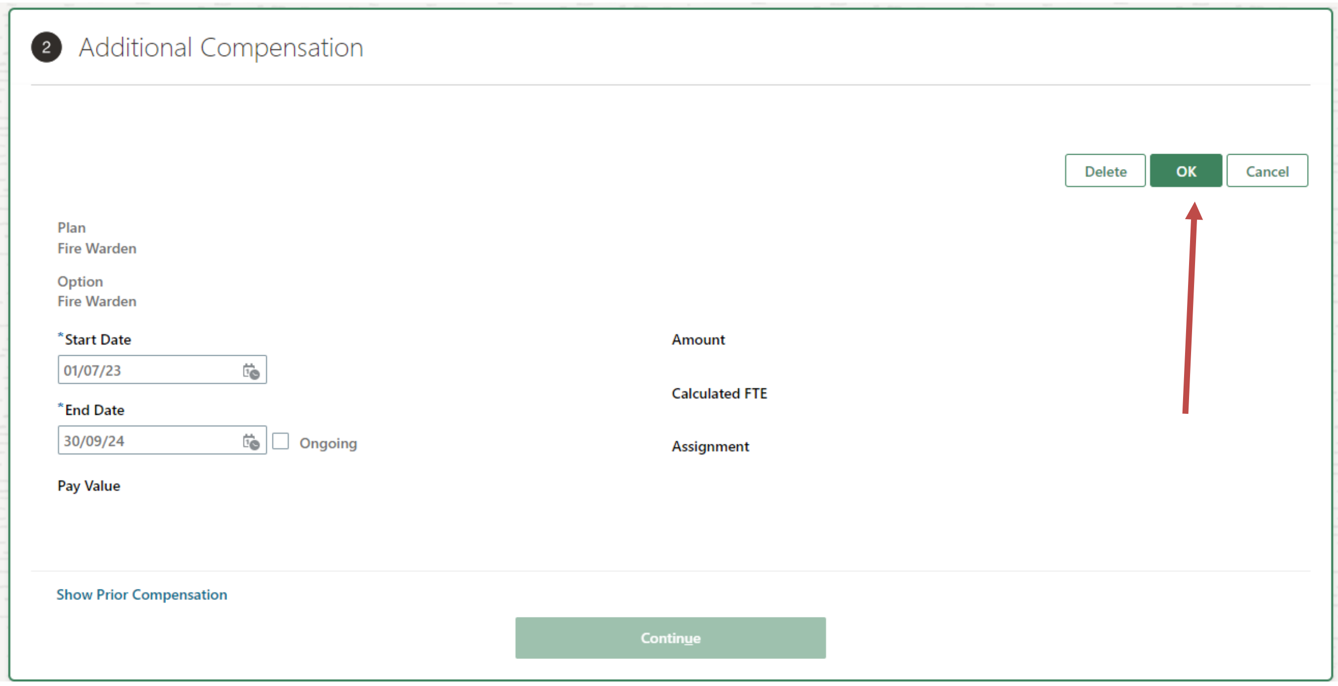


You will see the allowance in section 2



Click on the pencil to edit the allowance.

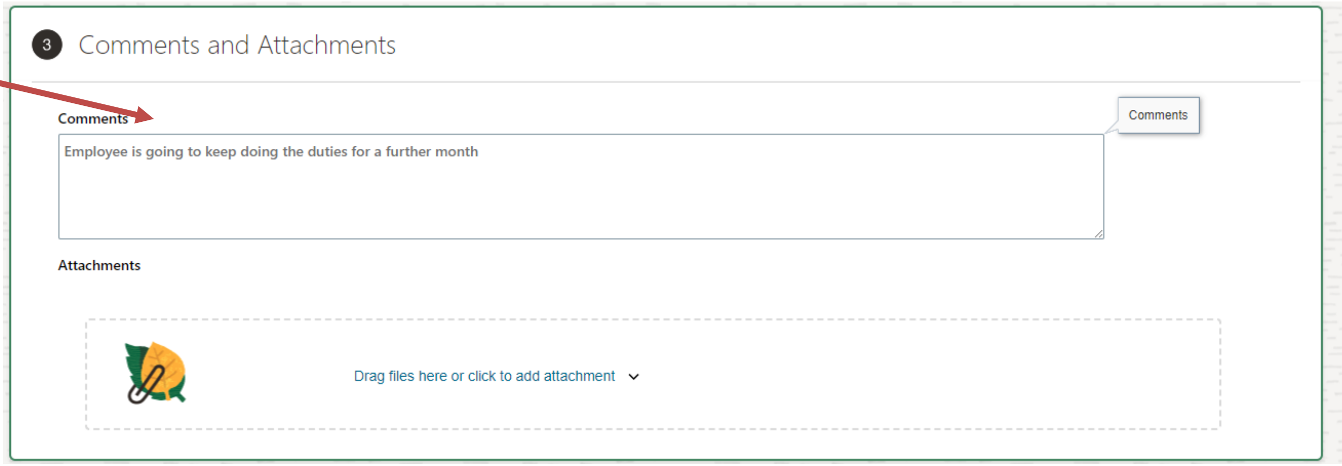
You can then make any changes you wish to



I am going to change the end date to 30.09.24. Click on OK once done.

Check the information if you are happy click on Continue.

Add any comments or attachments you wish. Remember to include notes on reason and end dates for temporary allowances being paid to enable us to include these in the letter to the staff member.



Click on submit at the top left of the page. Page will close when it has been submitted.

Please Remember: Always use the full time annual value for any amounts for allowances, the system will pro rate the value by FTE and pay in 1/12ths.

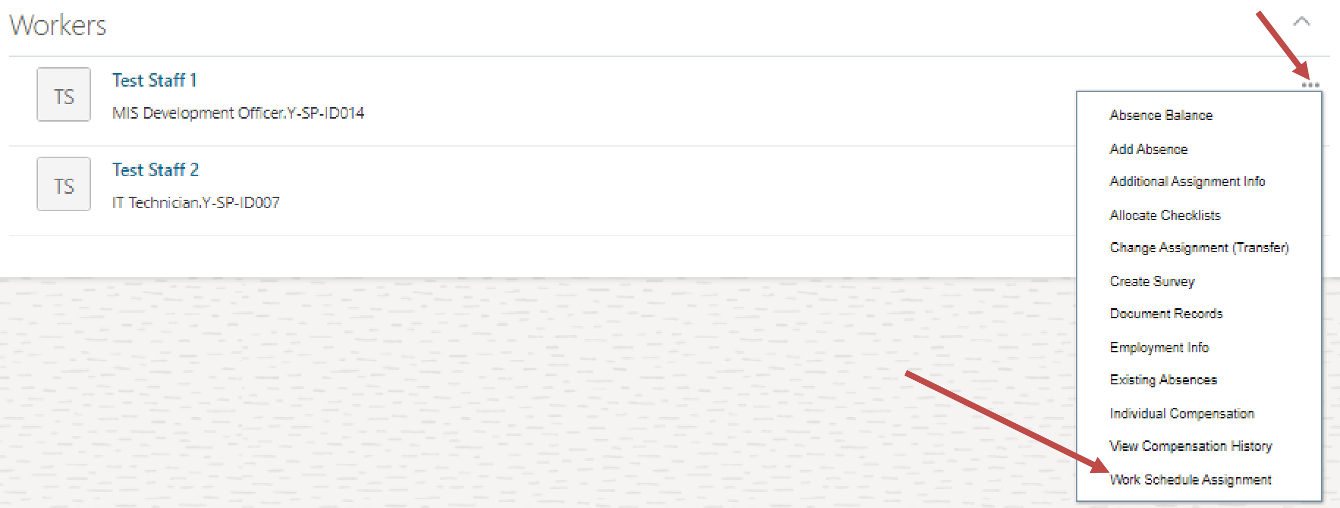
First Aid must always have an end date of not greater than 3 years. If you submit without this end date it will be rejected by payroll.

7.0 WORK SCHEDULE ASSIGNMENT

If staff are using Fusion to book annual leave, its important to have a working pattern in the system, so it knows how many hours to take each day.

The access the work schedule area access the My Team tile and click onto the 3 dots

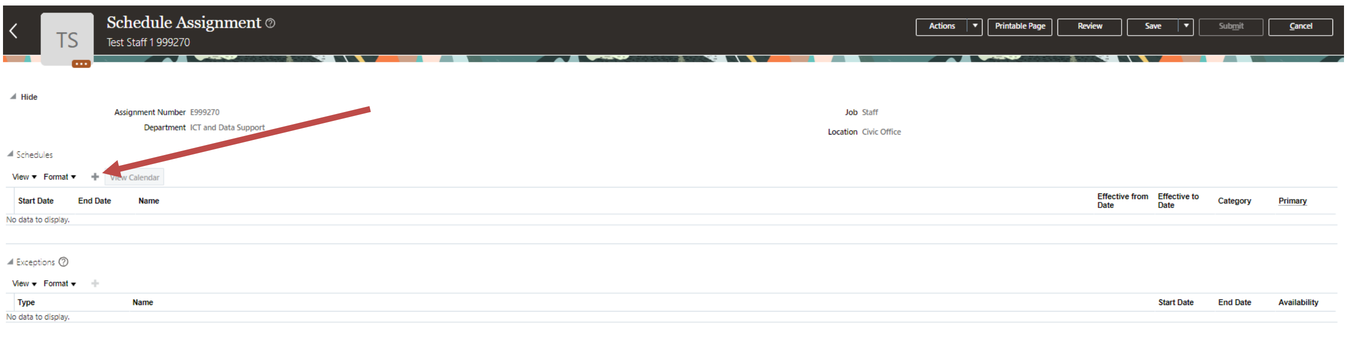
Then click on Work Schedule Assignment and follow the instructions below:



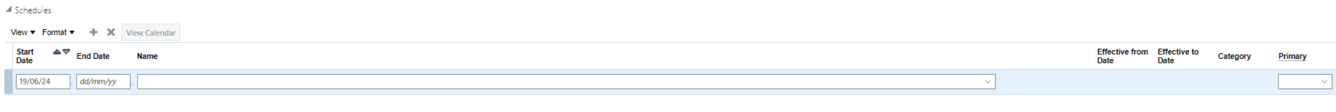
7.1 Adding a new working pattern

Please Remember: There is a formal process to follow for flexible working requests. Please contact your HR Business Parter to discuss.

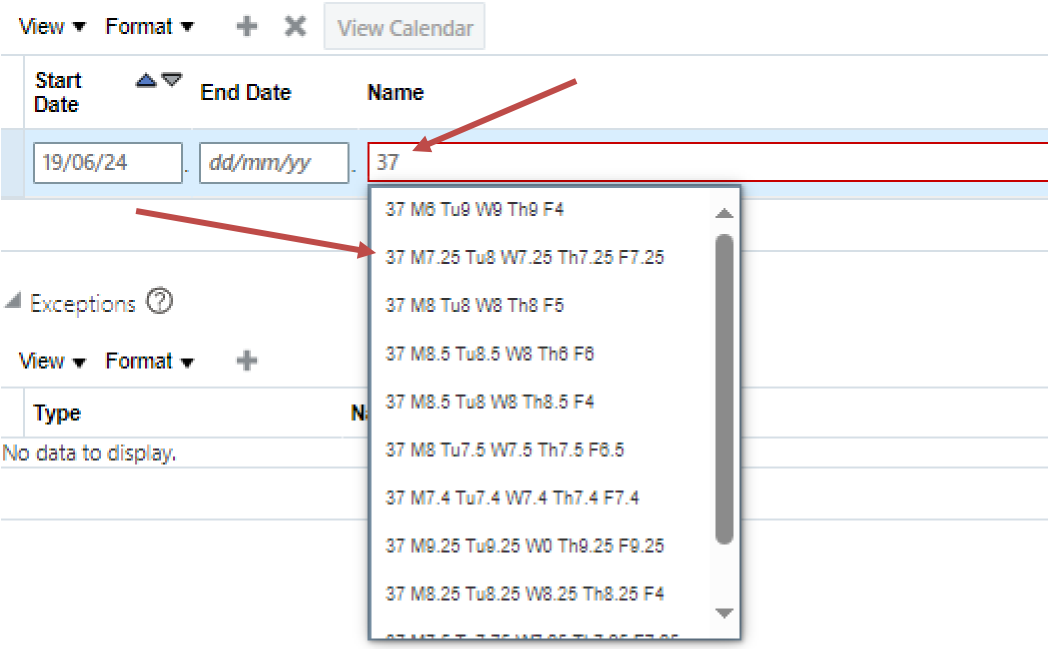
To add a new working pattern click on the little + button half way down the screen



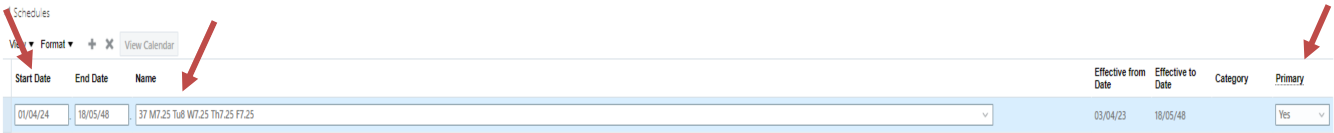
It will then add a blank row



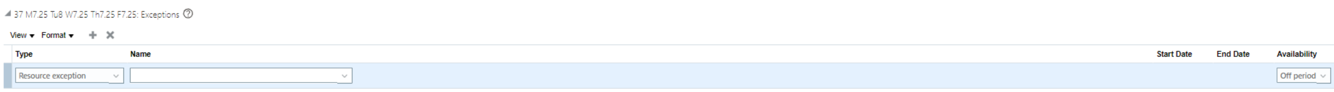
Start typing in the weekly contract hours into the Name box and all relevant working patterns will appear, select the correct working pattern



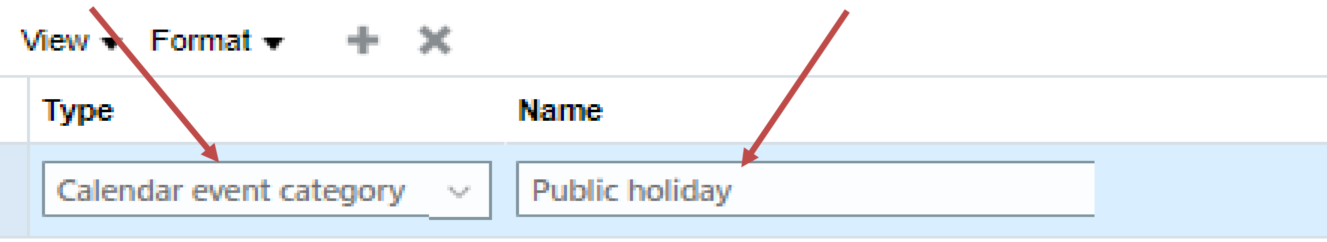
Then add the Start Date, select the pattern as Primary



If the contract is full time 37 hours, then you will have to add an Exception by clicking the + button

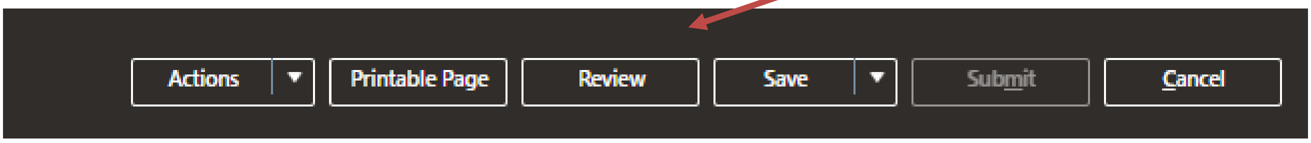


Then select Calendar event Category from the Type drop down menu and Public Holidays from the Name

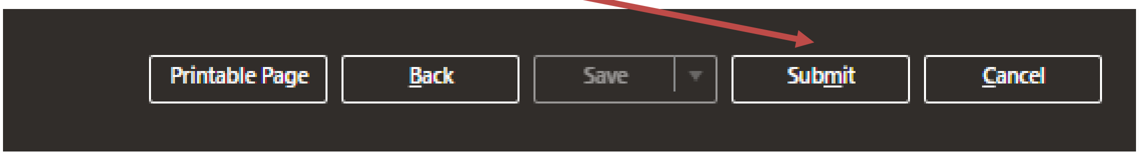


Please Remember: you do not have to add Exceptions for part time workers as they are allocated additional bank holiday hours on Fusion

Once you have added the working pattern (and exceptions, if required) click Review at the top right hand side of the screen



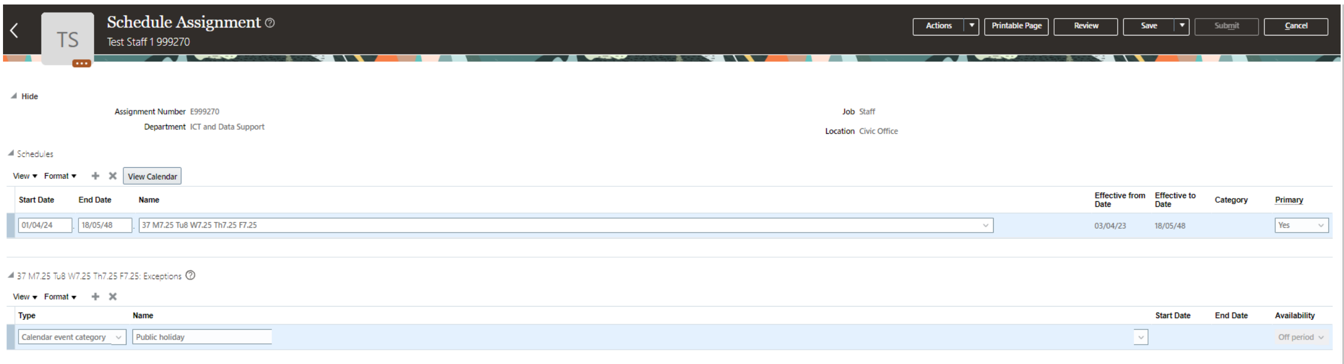
Then click Submit to close



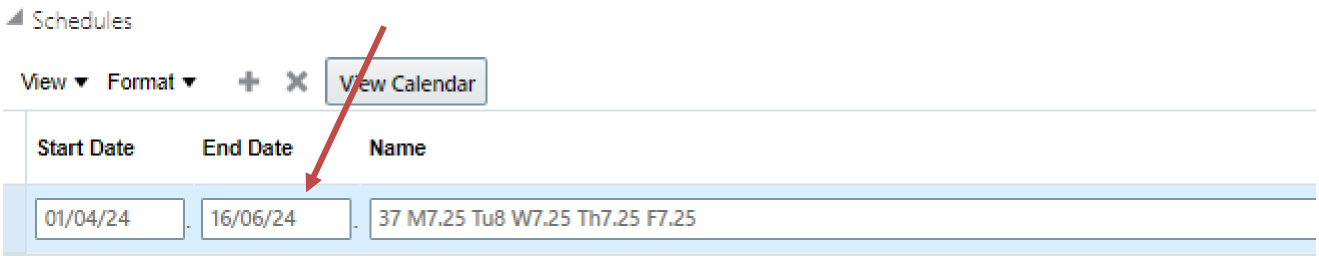
Please Remember: If the working pattern you're looking for is not in the system, please email ldelaney@valeofglamorgan.gov.uk and the working pattern will be created for you.

7.2 Amending a working pattern

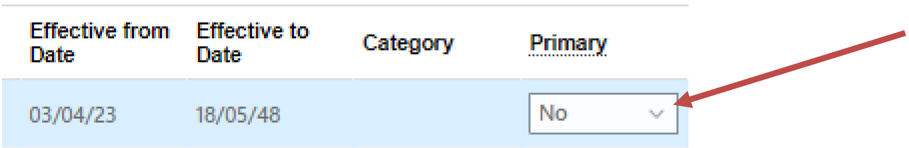
To amend a working pattern, follow the above instructions to access the Work Schedule Assignment area. You should then see the following screen, showing the current working pattern:



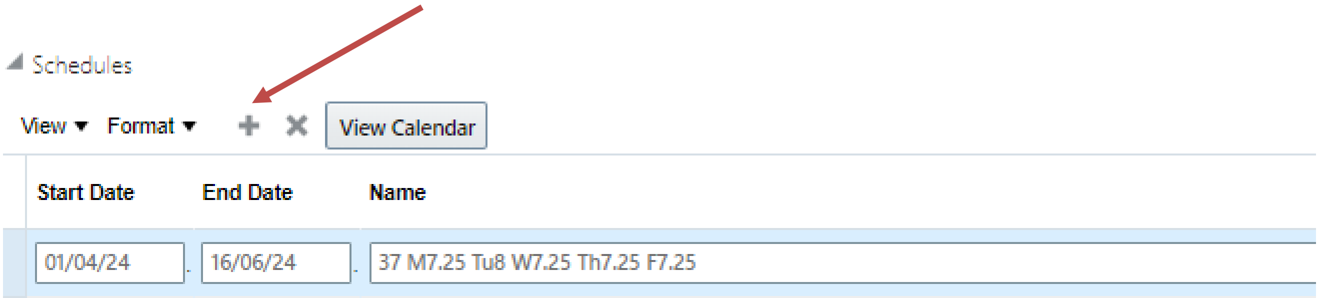
You will have to close the current working pattern the day before you start the new pattern



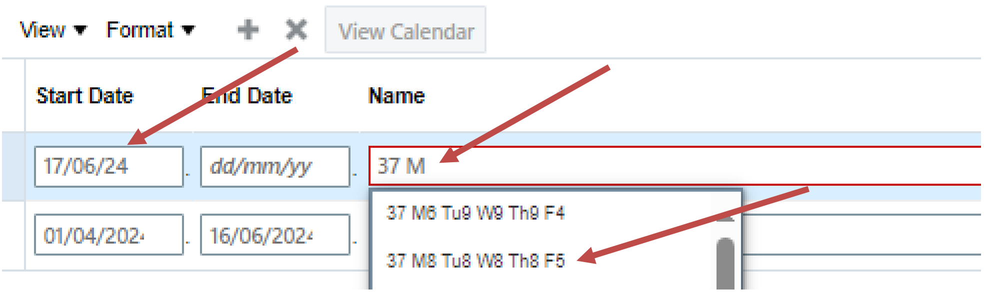
Select Primary drop down as No



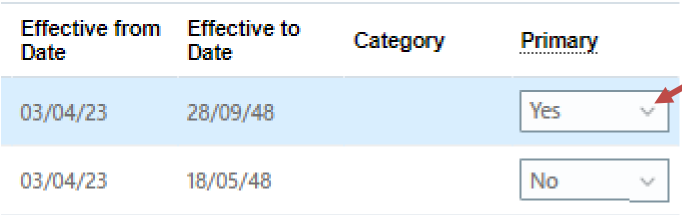
The you can then click the little + button to create a new pattern



You can then add the start date, start typing in the weekly contract hours, select the correct pattern

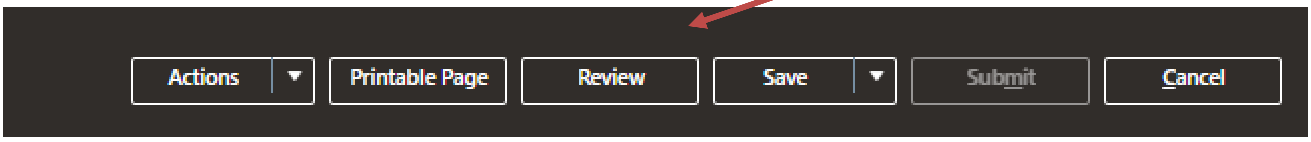


Click Yes in the Primary drop down menu

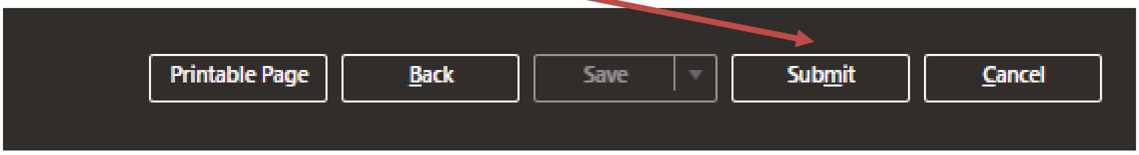


Effective from Date	Effective to Date	Category	Primary
03/04/23	28/09/48		Yes
03/04/23	18/05/48		No

Once you have amended the working pattern (and exceptions, if required) click Review at the top right hand side of the screen



Then click Submit to close



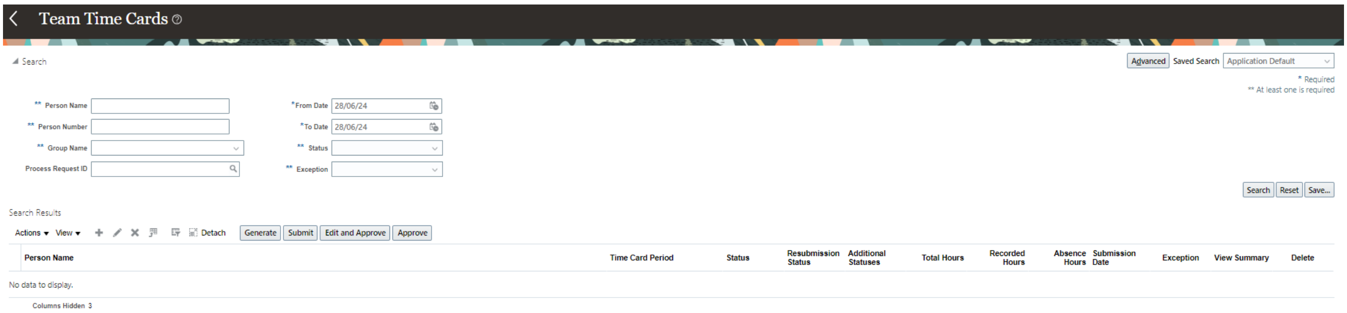
Please Remember: Working patterns should always start from a Monday and the end date should always be on the Sunday.

8.0 TIMESHEETS / TIMECARDS

To access the Timecard area click into My Team and then Team Time Cards

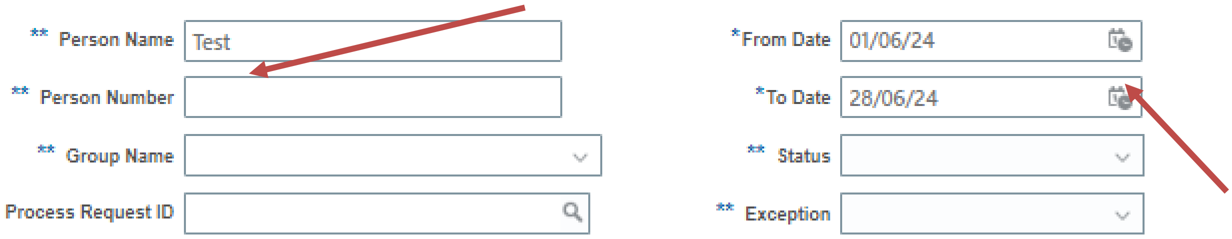
Please Remember: These are general instructions; mangers should refer to the timecard training for detailed instructions specific to your areas.

It will then take you to your dashboard view as shown below

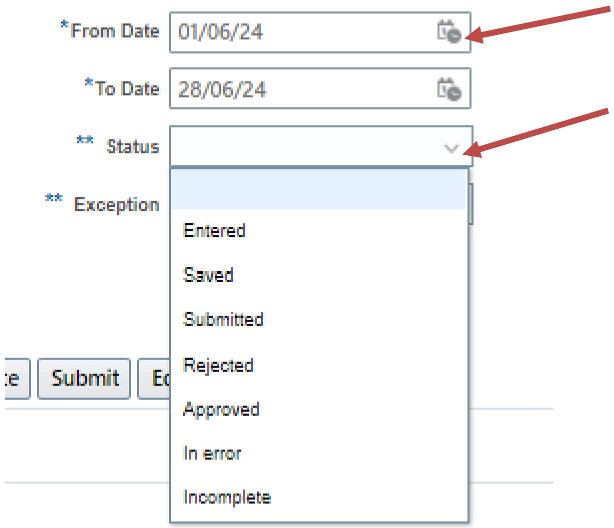


8.1 Searching for an existing Timecard

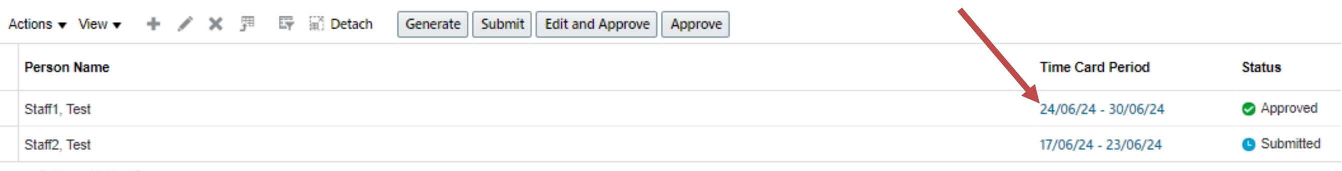
To search for a timecard entry, please click into the timecard area following the instructions above and either search for the person using their name or person number. Also remember to amend the date parameter to access the timecards you are searching for.



You can also search for your team timecards by date and status



You can always check the status of timecards in the Status area, but to click back into the timecard you can either click in the row and select Edit and Approve or you can just click into the blue date field



Entered and Saved Timecard is just sitting there, are will require submission

Submitted Timecard has been submitted and is awaiting approval

Rejected Timecard has been rejected

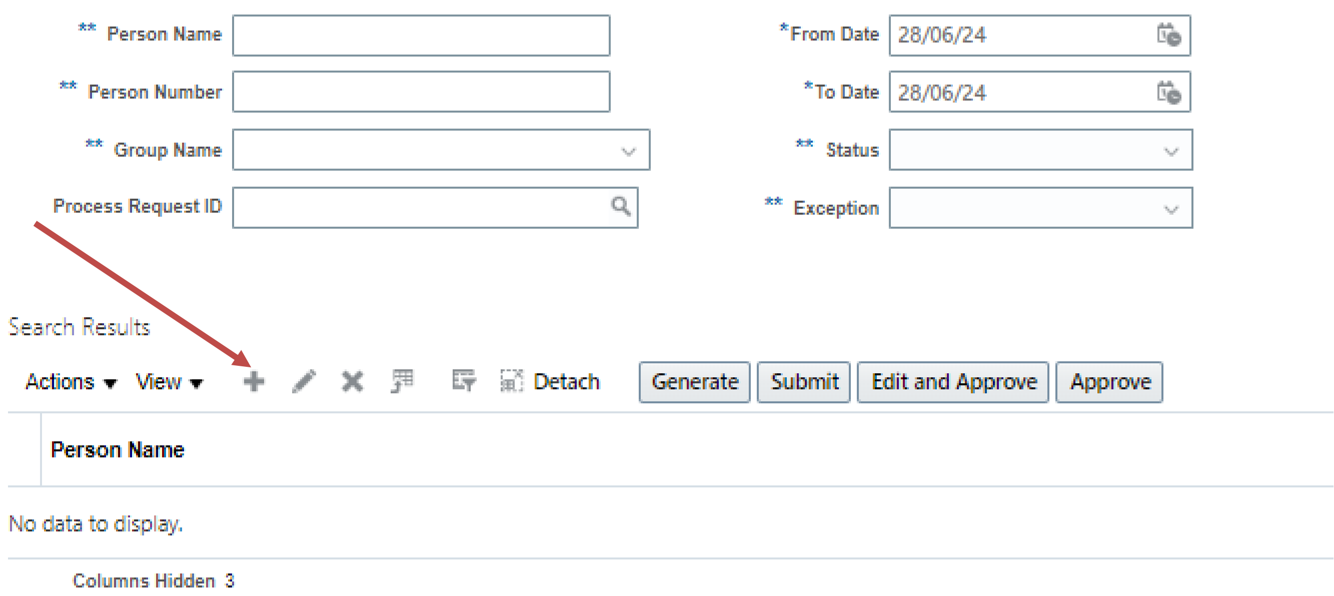
Approved Timecard has been approved and has been paid or is with Payroll to be paid

Time Card Period	Status	Resubmission Status	Additional Statuses	Total Hours	Recorded Hours	Absence Hours	Submission Date	Exception	View Summary	Delete
24/06/24 - 30/06/24	Approved			7.00	7.00	0.00	28/06/24			
17/06/24 - 23/06/24	Submitted			2.00	2.00	0.00	28/06/24			

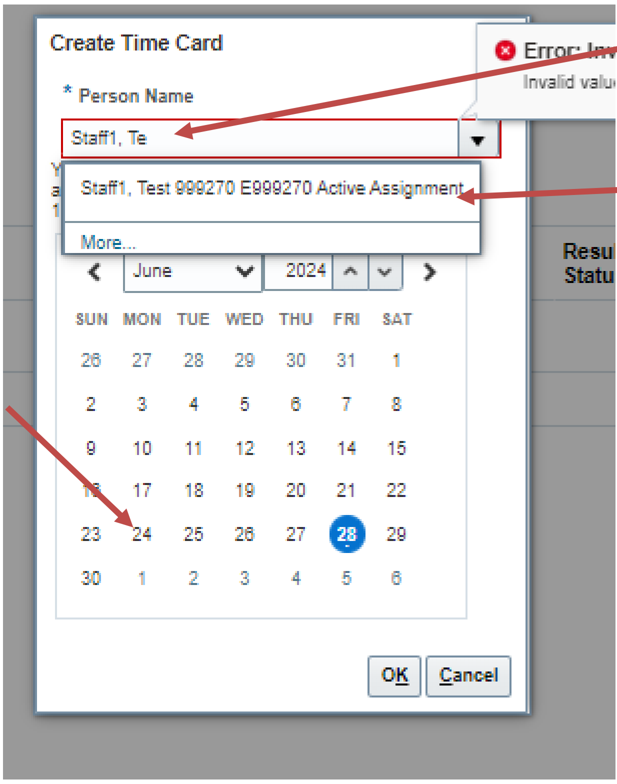
Please Remember: If you just want to check the timecard without making any changes the safest way to do this is by clicking on the glasses icon (as detailed above), which will take you to the review screen without the need to enter the timecard area. if you go into a timecard but dont want to make any changes please click Cancel, if you click save or next, the timecard will revert to that status and will require re-submitting and re-approval

8.2 Adding a new Timecard

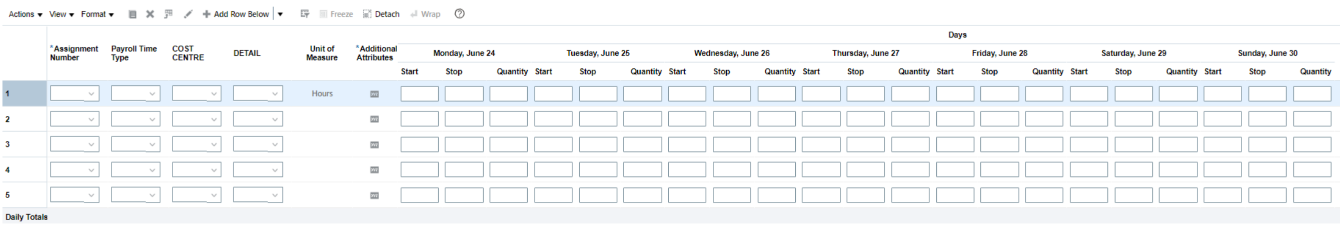
To add a new Timecard, click into the timecard area as detail above and the click on the little + sign half way down the screen



Add the persons name Surname, First-name when it appears click the name to select and select the relevant date



Your timecard area will then appear for you to start working through

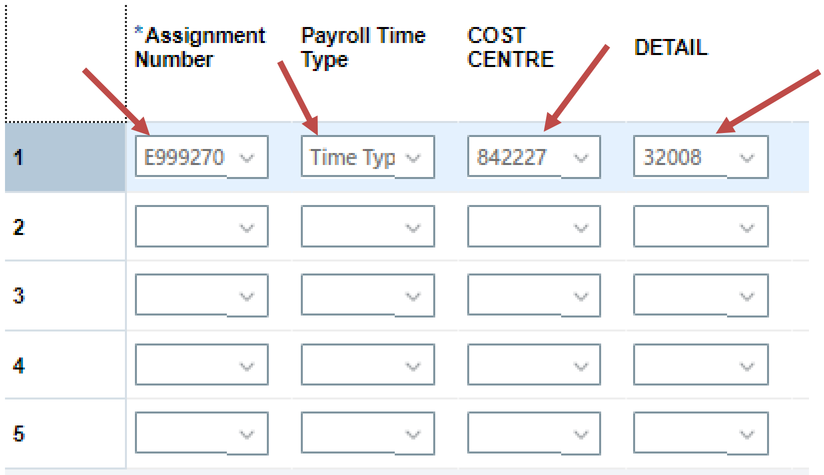


Select the relevant assignment number for the timesheet you are creating, add your Payroll Time Type: a full explanation of the Payroll types and when to use them can be found on iDev, under Oracle Fusion, Managing Timesheets – Time Reference Codes

Please remember: if your staff member has multiple assignments, ensure you are selecting the correct one for your timecard entry.

For all overtime over and above contracted hours, please use Time Type JE. Start typing Time into the box and it will appear for you to select.

The Cost Centre and Detail code will automatically default to your area, the only time you need to amend this if the time is being costed to another area, again, just start typing in the code and they will appear for you to select



Depending on the time type you are using, you should either then enter the Start and Stop times or quantity into the days of the week where you worked. For Time Type JE entries, you have to use the Start and Stop times against the days of the week using a 24 hour clock format

For example if you are using Time Type JE as the time type, please use the start and stop times based on a 24 hour clock format

08am	08:00
1pm	13:00
10pm	22:00

Please also be aware that the system doesn't like midnight so please use 11:59 and then start again the next day at 00:01

The system is then clever enough to work out the rates of pay for you

If however, as an example, you are using Standby Rates 1, 2 or 3, then adding a quantity instead of start and stop time is fine, as the Standby rates are pre set, so wont be determined by the times of the day or the days of the week. Please add quantity as follows:

¼ hour	0.25
½ hour	0.50

¾ hour 0.75

Monday, June 24			Tuesday, June 25			Wednesday, June 26			Thursday, June 27			Friday, June 28			Saturday, June 29			Sunday, June 30		
Start	Stop	Quantity	Start	Stop	Quantity	Start	Stop	Quantity	Start	Stop	Quantity	Start	Stop	Quantity	Start	Stop	Quantity	Start	Stop	Quantity
08:00	10:00														10:00	13:00		15:00	17:00	

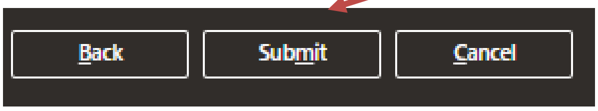
Once you are happy with the submission click Next at the top right hand side of the screen to take you to the review screen

You can then check the review screen to see how its allocated the rates of pay as detailed below

Actions ▾ View ▾ Format ▾ Freeze Detach Wrap

	Payroll Time Type	COST CENTRE	DETAIL	*Assignment Number	Unit of Measure	*Additional Attributes	Monday,	
							Start	Stop
1	Time and Plain J	842227	32008	E999270	Hours			
2	Time and Quarte	842227	32008	E999270	Hours			
3	Time and Half JE	842227	32008	E999270	Hours			
Daily Totals								

If you are happy click Submit for it to go to approval



If you would like to approve them at the same time, you can follow the instructions at the top of the screen, search for the Timecard you have just entered and then approve in this area, by click onto the row you want to approve and then clicking Approve

Actions ▾ View ▾ Detach Generate Submit Edit and Approve Approve

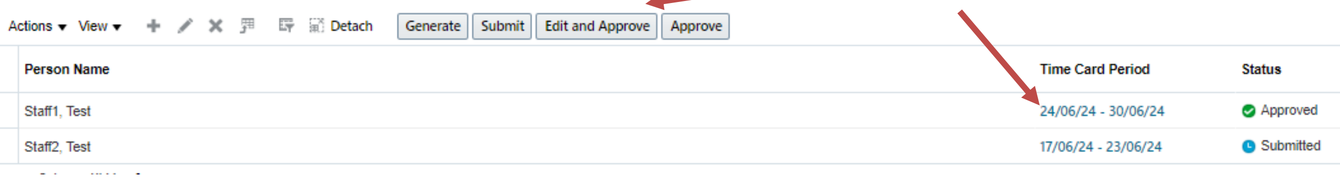
Person Name	Time Card Period	Status	Resubmission Status	Additional Statuses	Total Hours	Recorded Hours	Absence Hours	Submission Date
Staff1, Test	24/06/24 - 30/06/24	Submitted			7.00	7.00	0.00	28/06/24
Staff2, Test	17/06/24 - 23/06/24	Submitted			2.00	2.00	0.00	28/06/24

Please Remember: If you click Save or Save and Close, the timecard will just sit in that area, it is only submitted for approval once you click Next and then Submit

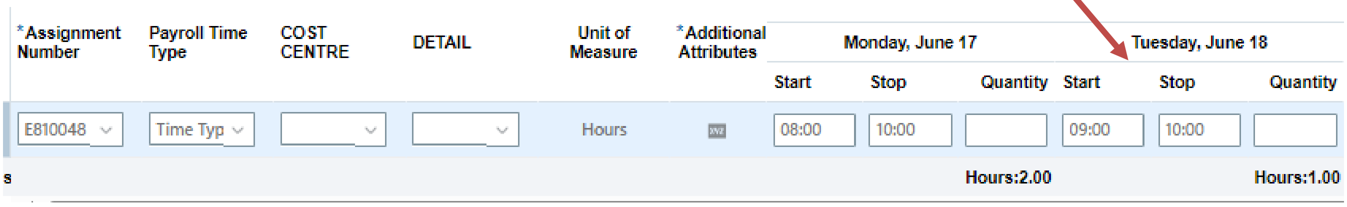
8.3 Editing an existing Timecard

If you have to amend a timecard that has been submitted, follow steps in 7.1 and search for the relevant timecard.

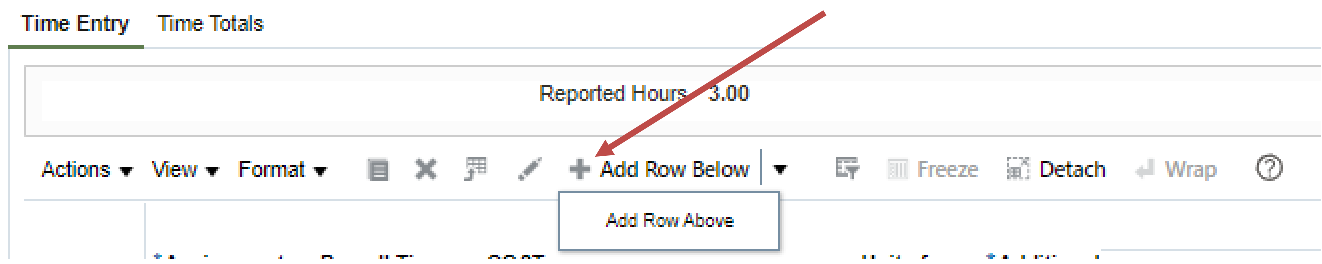
Once you have identified the correct timecard, you can either click into the blue date field or click into the relevant row and select Edit and Approve



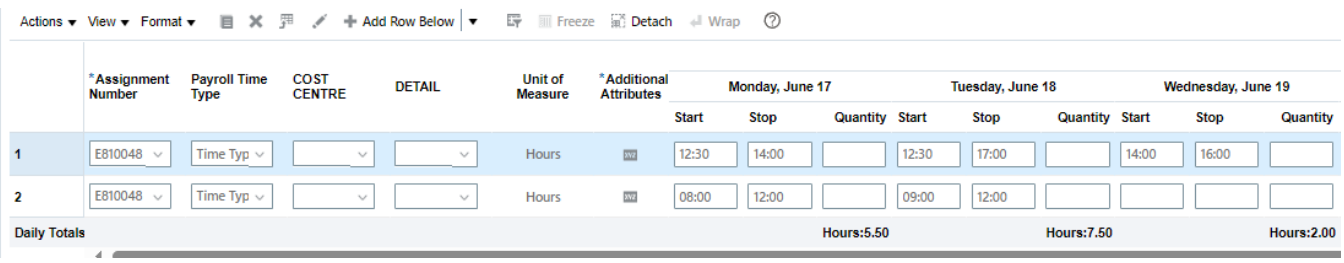
Once you have re-entered the timecard area, make the necessary changes



You can also add another row by clicking into + Add Row Below



You can then add the information required in the 2nd row as detailed below



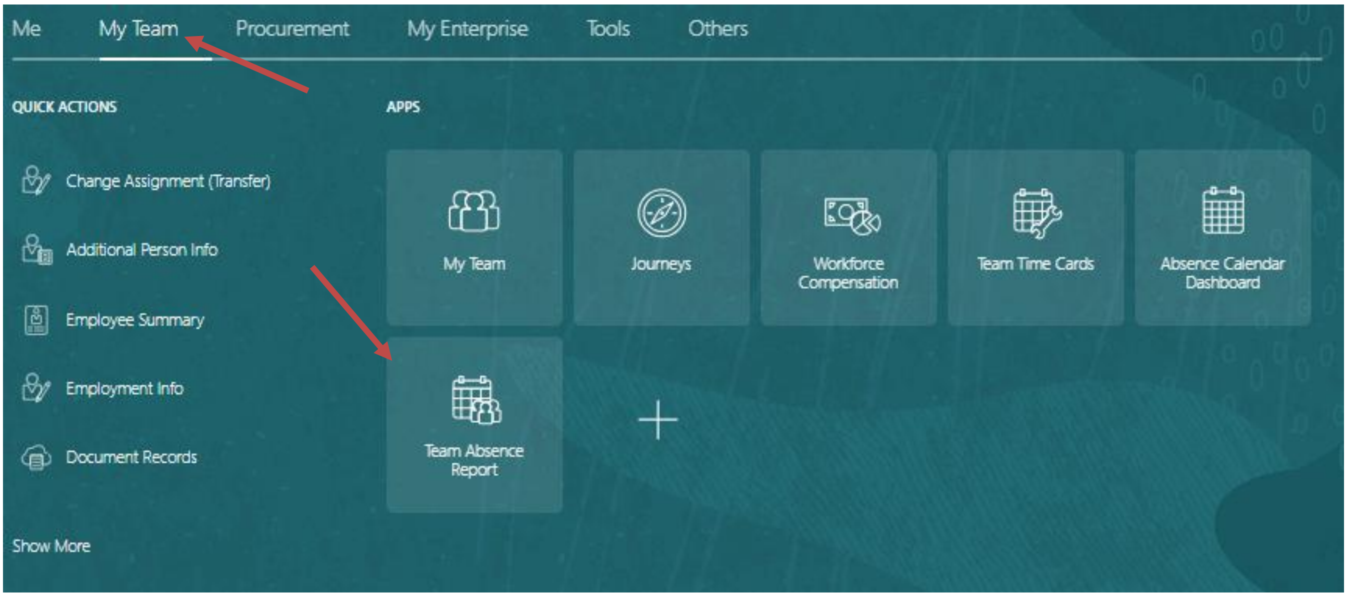
Once you are happy Click Next

Then click submit, once submitted you will have to follow the above instructions at the end of the adding a new timecard area and re-approve

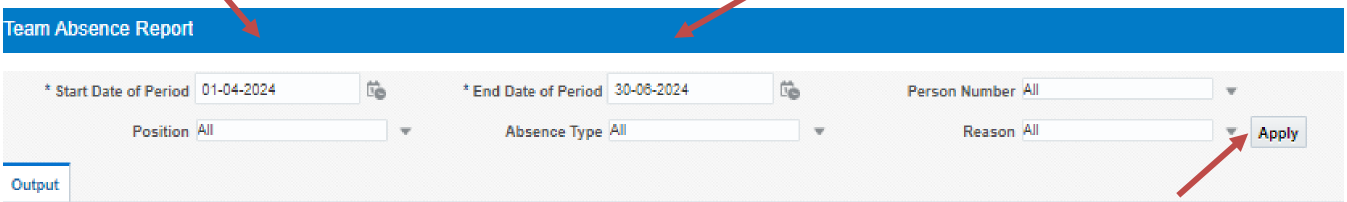
Please Remember: if someone is working the full day, the system wont automatically take off the lunch break, you should therefore add the morning on one row and the afternoon on a 2nd row

9.0 TEAM ABSENCE REPORT

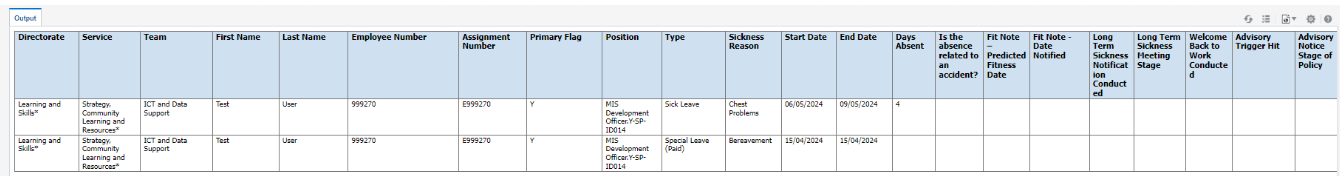
With the introduction of Fusion, Managers can now run absences reports on behalf of their Team. To access the Team Absence Report area click into My Team and then Team Time Cards



The following screen will open where you can specify your parameters. You can then either access a report for your whole Team or by an individual, once you have set the parameters you require, select Apply



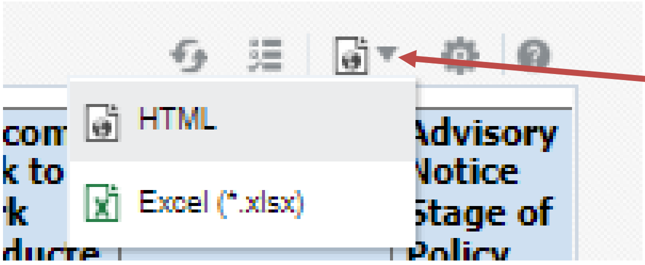
The information will then appear on the screen for you to view



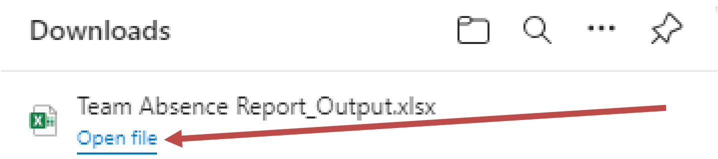
Output

Directorate	Service	Team	First Name	Last Name	Employee Number	Assignment Number	Primary Flag	Position	Type	Sickness Reason	Start Date	End Date	Days Absent	Is the absence related to an accident?	Fit Note – Predicted Fitness Date	Fit Note - Date Notified	Long Term Sickness Notification Conducted	Long Term Sickness Meeting Stage	Welcome Back to Work Conducted	Advisory Trigger Hit	Advisory Notice Stage of Policy
Learning and Skills*	Strategy, Community Learning and Resources*	ICT and Data Support	Test	User	999270	E999270	Y	MIS Development Officer.Y-SP-ID014	Sick Leave	Chest Problems	06/05/2024	09/05/2024	4								
Learning and Skills*	Strategy, Community Learning and Resources*	ICT and Data Support	Test	User	999270	E999270	Y	MIS Development Officer.Y-SP-ID014	Special Leave (Paid)	Bereavement	15/04/2024	15/04/2024									

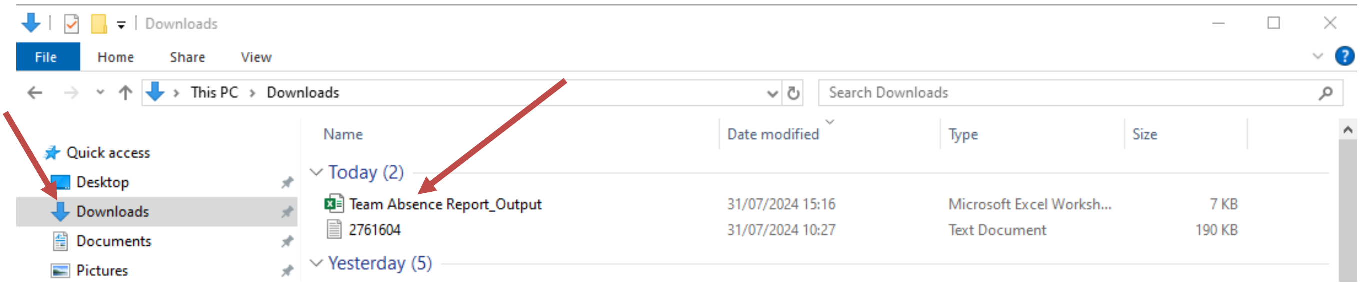
You can also download the reports by selecting the drop down on the right-hand side of the screen, and then selecting the format you would like.



Once the report has downloaded you can access it through Downloads



Or by accessing Downloads in your folder space



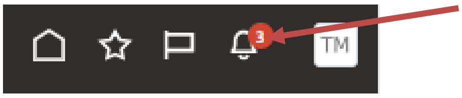
10.0 APPROVALS

There are a various activities within Fusion that will require manager approval, such as annual leave, special leave, timesheets and expenses.

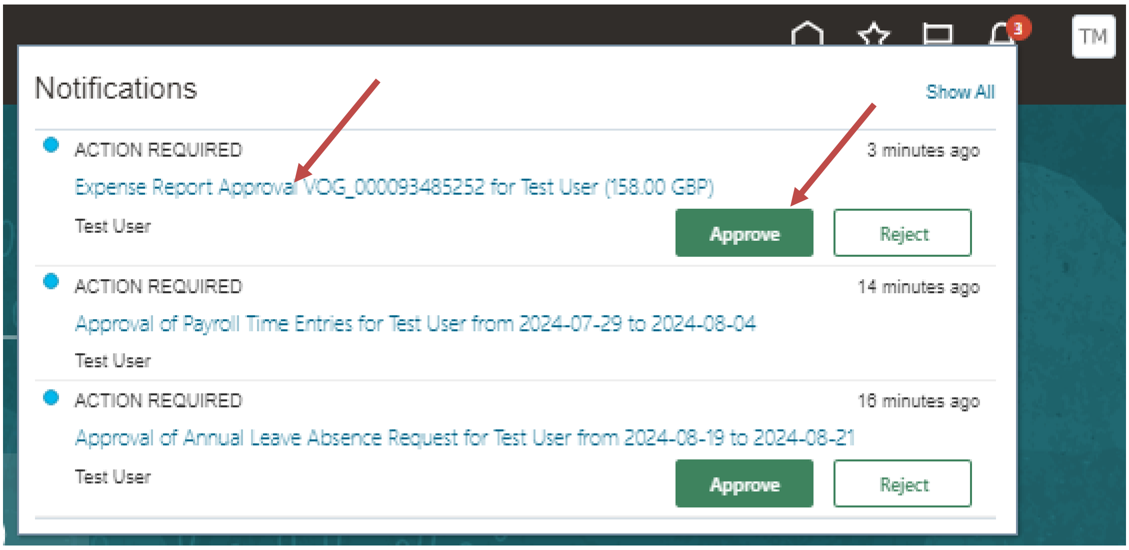
You will be informed when approvals are required via an automatic email generated from Fusion.

When you log into Fusion you can access the approvals in two different ways.

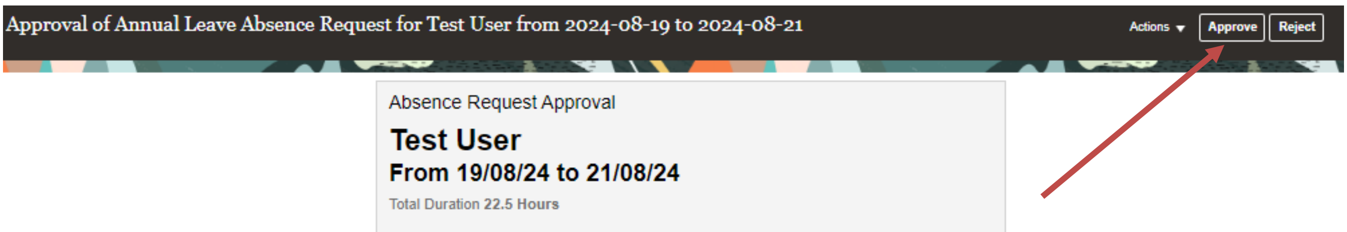
By clicking on the bell icon on the top right-hand side of your screen



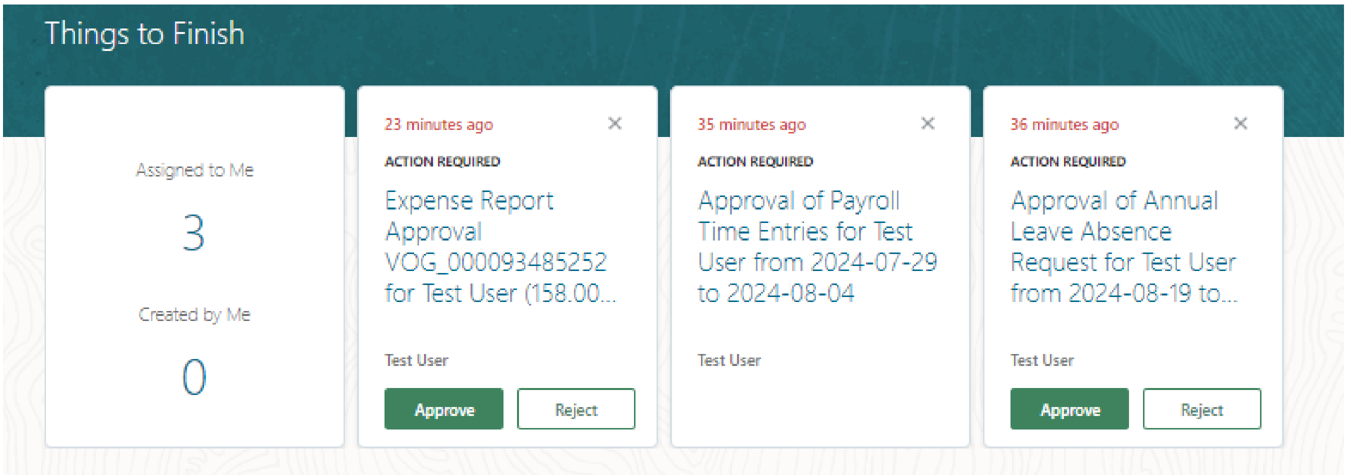
You can then either approve from here, or if you would like to view the information further, click into the blue writing



When you click into the blue writing to view the approval request, you can then approve at the top right-hand side of the screen



You can also view the approvals assigned to you at the bottom of your screen, in the 'Things to Finish' area

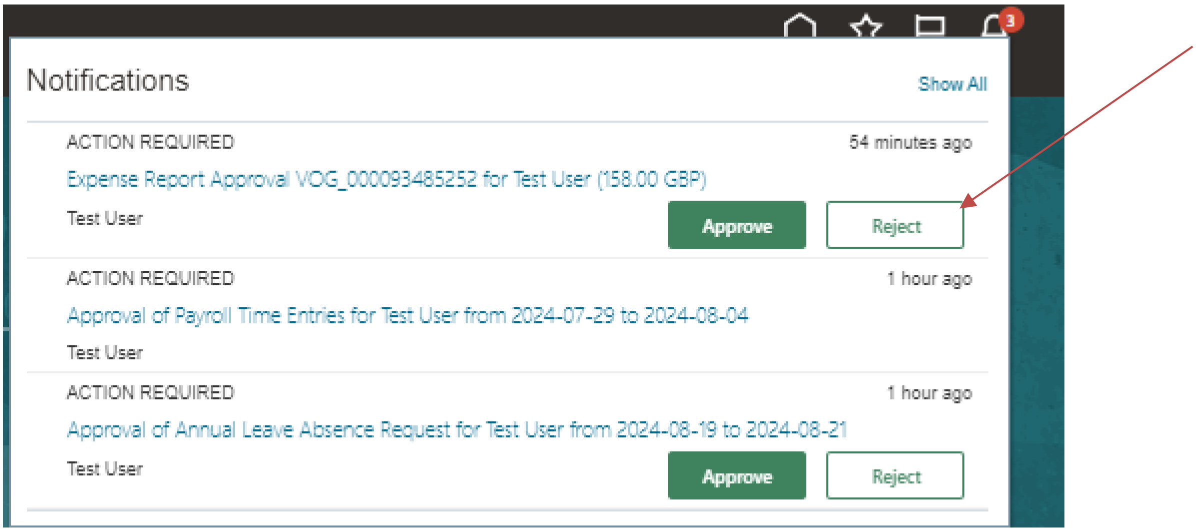


The same principle applies, you can approve by clicking the approve button, or you can view the details of the request by clicking into the blue writing and then selecting approve or reject,

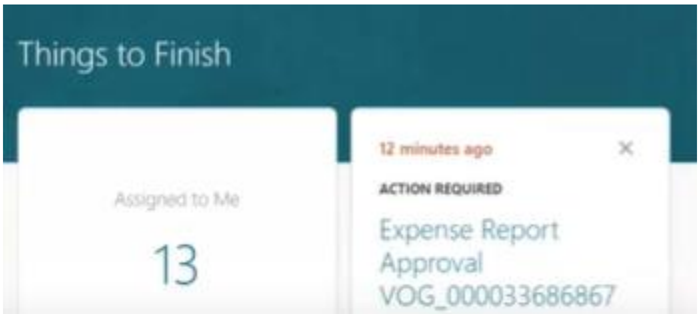
10.1 Expenses Approvals

As a manager you are accepting responsibility for the claim to be paid. Therefore, you must check the details on the request before approving it.

You will get a and email and a notification as below to advise you that an expense has come through but there is not enough within this to approve it. You need to review the expense report and each item on there, including attachments to approve. This includes making sure that the claims is for expenses that can be claimed such has not claiming mileage to home etc and that they have not claimed it previously.

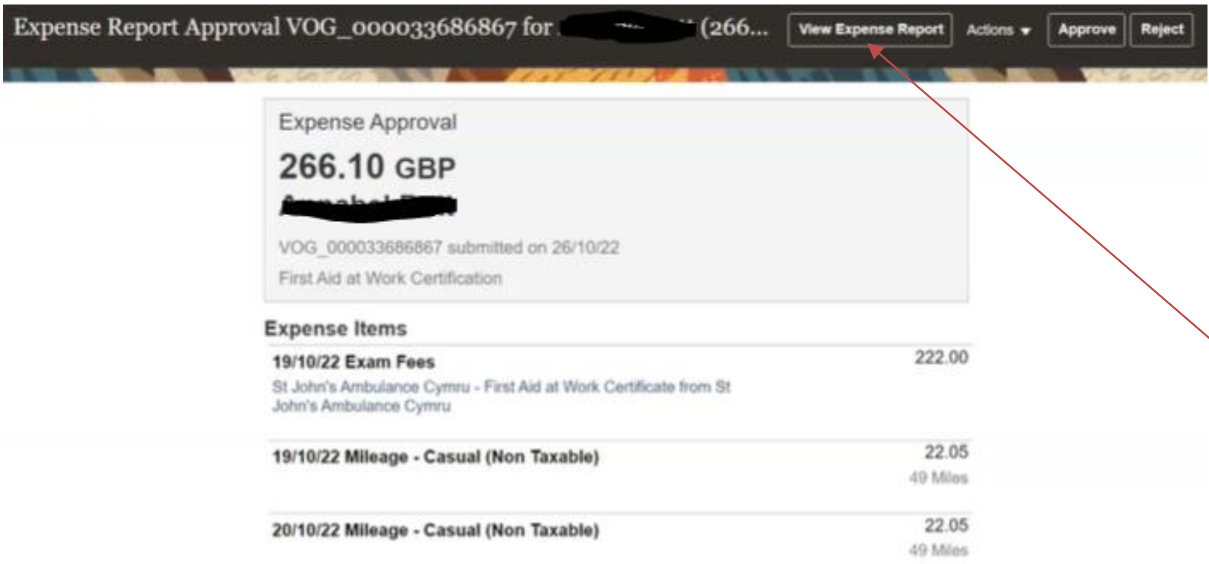


The expenses will also show at the bottom of the home page as shown below



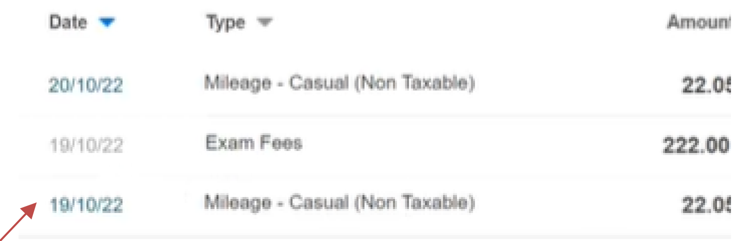
Again there is an approve and reject under here but you need to open up the expense report. To do this you need to click where it says expense report either in the bell notification or in the link at the bottom of your home page.

This will open up a summary



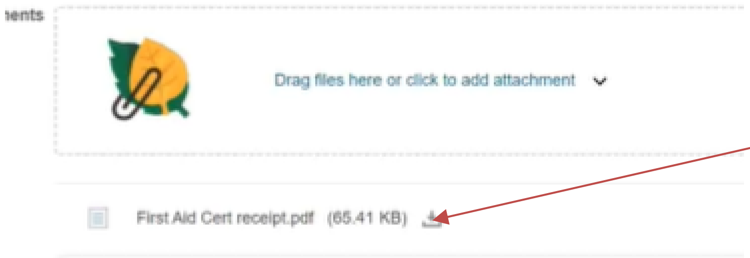
To view the report and attachment click view expense report

All expense items will for approval with then open in a new window

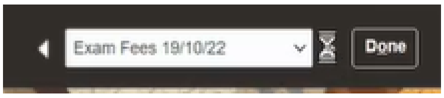


To view them each you can click on the date next to them. This shows you what the member of staff has entered.

On the right hand of the screen you can then look at any attachments by clicking on the download button



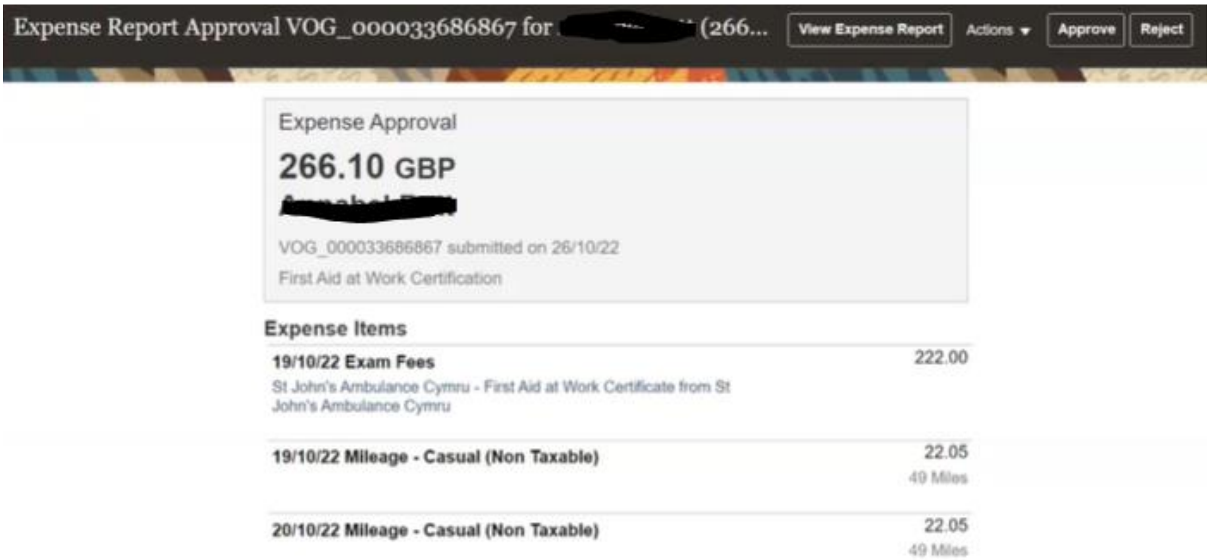
At the top of the report then you can click on the arrow if there was more than one entry to move to the next one to review



Once this is complete then select done.

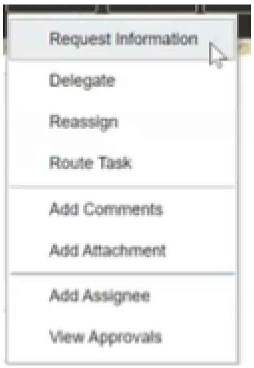
This will take you back to the front of the expense report and you can select done in the top right of the screen

You then need to re-open the bell notification and click on the expense report to take you back to the summary page



If everything is ok at this stage you can approve. You have the option to add a comment attachment if you want.

The action drop down gives you further options:



Request further information for example a receipt was missing

Re-assign – This will be need to be used in the claim is for £500 or more or is more than 3 months old. In these case the expense report will need to be approved by an OM or above. If not the claim will get rejected by audit which may cause a delay to someone receiving their expenses.

You would then need to enter the name of the person you are re-assigning this to and add a comment in the reasons as to why. Once the OM or above approves this then the claim will be passed to audit for final approval.

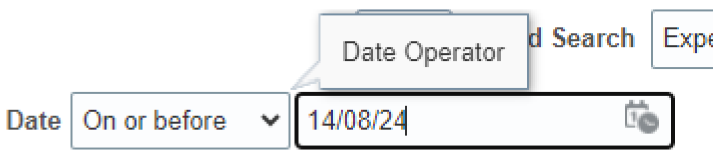
You can add comments if you have spoken to someone about it so that the record is retained or you can add an attachment.

If you reject you have to add a comment as to why.

You cannot view previous approvals for a user but the member of staff will be able to view them within the Me section of Fusion then Expenses

If they then click in the search on the top right:

The search then appears. If the click on date and change it to on or before and add today's date Then click search below:



This will bring up their previous claims they have made via Fusion.

Any pending expense reports will also show for the member of staff on the expenses home page and will show the status of the report such as pending approval etc

10.1 Timesheet/Timecard Approvals

Timecard Approval – How it works for Employees and Managers

New Timecard

Employee – Enters the timecard information, clicks next to check the data, paying special attention to the bottom part of the screen which shows the rates to be paid, then clicks Submit. The timecard will show on the summary screen as 'Submitted'

Managers – The manager for each post that the timecard relates to will receive a notification on the Bell, if the employee has three assignments but only entered data against two assignments only the two managers will receive a notification.

Manager 1 – When you click on the notification on the Bell, it will only show the hours on the timecard that relate to the assignment you are responsible for, check and approve/reject, the notification will then disappear from the Bell. You are only approving your hours and the timecard will not be paid until all managers have approved their times.

Employee – for the employee the timecard will still show as 'Submitted' as it is not fully approved

Manager 2 – When you click on the notification on the Bell, it will only show the hours on the timecard that relate to the assignment you are responsible for, check and approve/reject, the notification will then disappear from the Bell. You are only approving your hours and the timecard will not be paid until all managers have approved their times.

Employee – for the employee the timecard will now show as 'Approved' as both managers have approved the hours the timecard is complete and ready for payment

Manager 3 – will not receive any notifications as there are no hours that relate to the assignment that they are responsible for.

Amended Timecard

Employee – goes back into an 'Approved' timecard amends the hours for only assignment 1, clicks next for the timecard to be refreshed, then check the data paying special attention to the bottom part of the screen which shows the rates to be paid, then clicks Submit. The timecard will now show on the summary screen as 'Submitted'

Managers – The manager for each post that the timecard relates to will again receive a notification on the Bell, if the employee has three assignments but only entered data against two assignments only the two managers will receive a notification.

Manager 1 – When you click on the notification on the Bell, it will only show the NEW hours on the timecard that relate to the assignment you are responsible for, check and approve/reject, the notification will then disappear from the Bell. You are only approving your hours and the timecard will not be paid until all managers have approved their times.

Employee – for the employee the timecard will still show as 'Submitted' as it is not fully approved

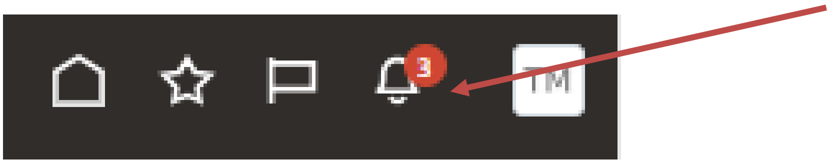
Manager 2 – Even though the timecard relating to this assignment has NOT been changed a notification will again appear on the Bell, it will only show the hours on the timecard that relate to the assignment you are responsible for, re-check and approve/reject, the timecard will not be paid twice but must be approved for the whole timecards to be paid. You are only approving your hours and the timecard will not be paid until all managers have approved their times. The notification will then disappear from the Bell

Employee – for the employee the timecard will now show as 'Approved' as both managers have approved the hours the timecard is complete and ready for payment

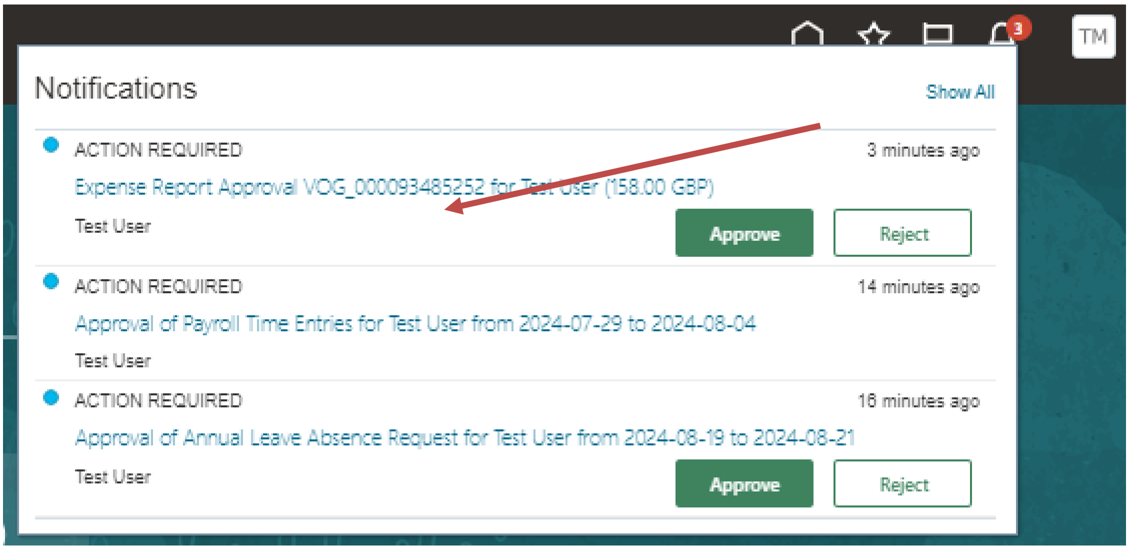
Manager 3 – will not receive any notifications as there are no hours that relate to the assignment that they are responsible for.

10.3 Delegating approvals to another Manager

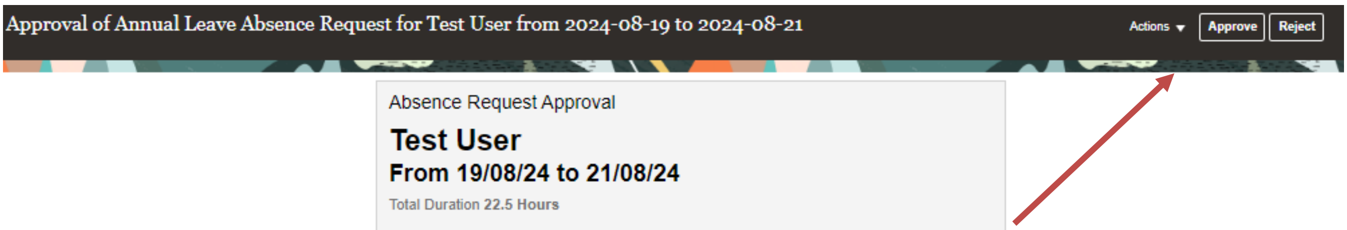
If you receive the approval email, but it needs to be delegated to another manager, access the bell icon as detailed above and follow the instructions below



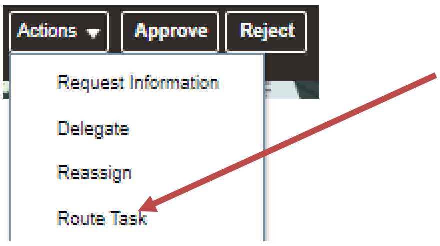
Select into the approval you need to re-assign by clicking into the blue hyperlink



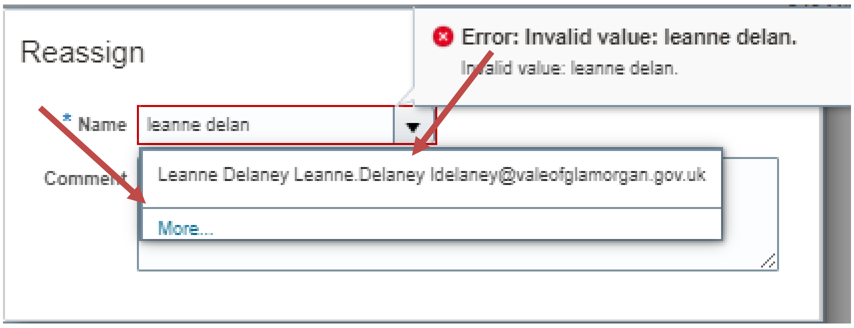
It will then take you into the review screen, click the action button at the top right and side of the screen and select re-assign



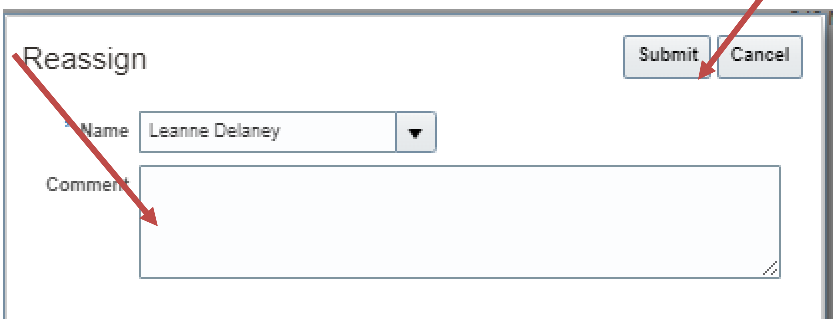
Click on Reassign



Populate the name field with the appropriate manager, click on their name when it appears



Add any comments and press submit.



10.4 Setting Vacation Rules

As a nominated Approver within the Oracle Fusion system, requests will be routed to you for approval.

If you are not going to be available for a period of time, you should create a Vacation Rule to assign another employee to manage your approvals.

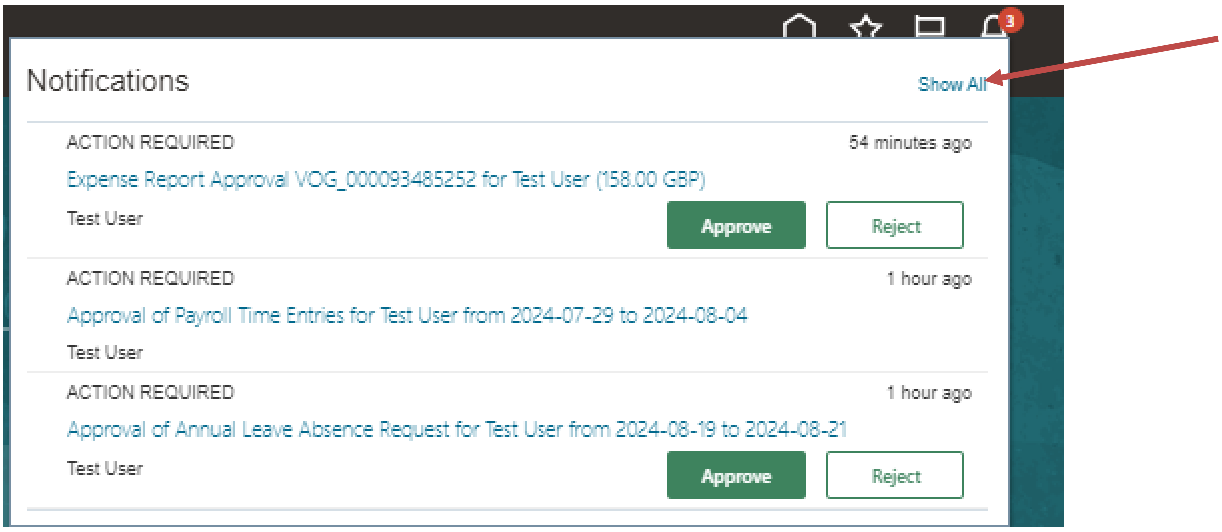
Your approval and reminder notifications will be automatically redirected for the time period specified.

Please Remember: It is important that you select 'Delegate to' when setting up the vacation rule, as this ensures the user has the correct permission to approve the request

Navigation

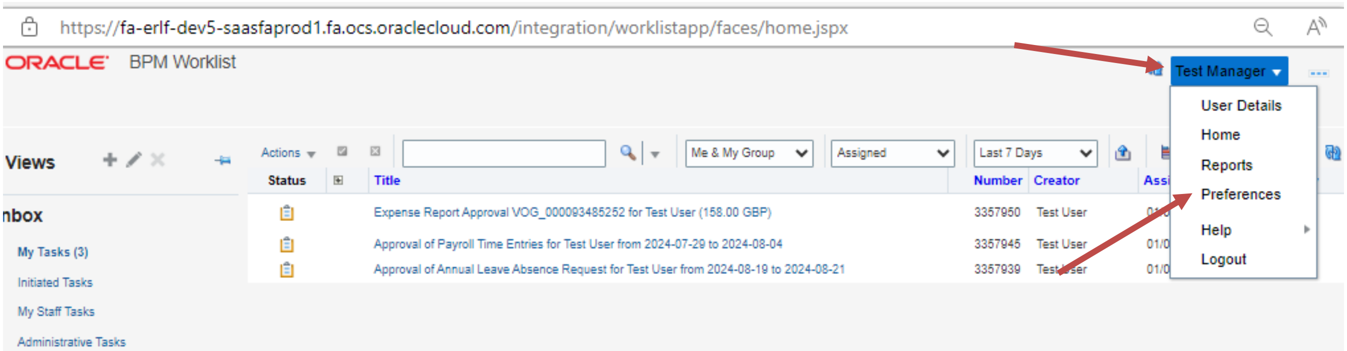
To set a Vacation Rule please access the bell icon and follow the steps as detailed below:

Click on show more

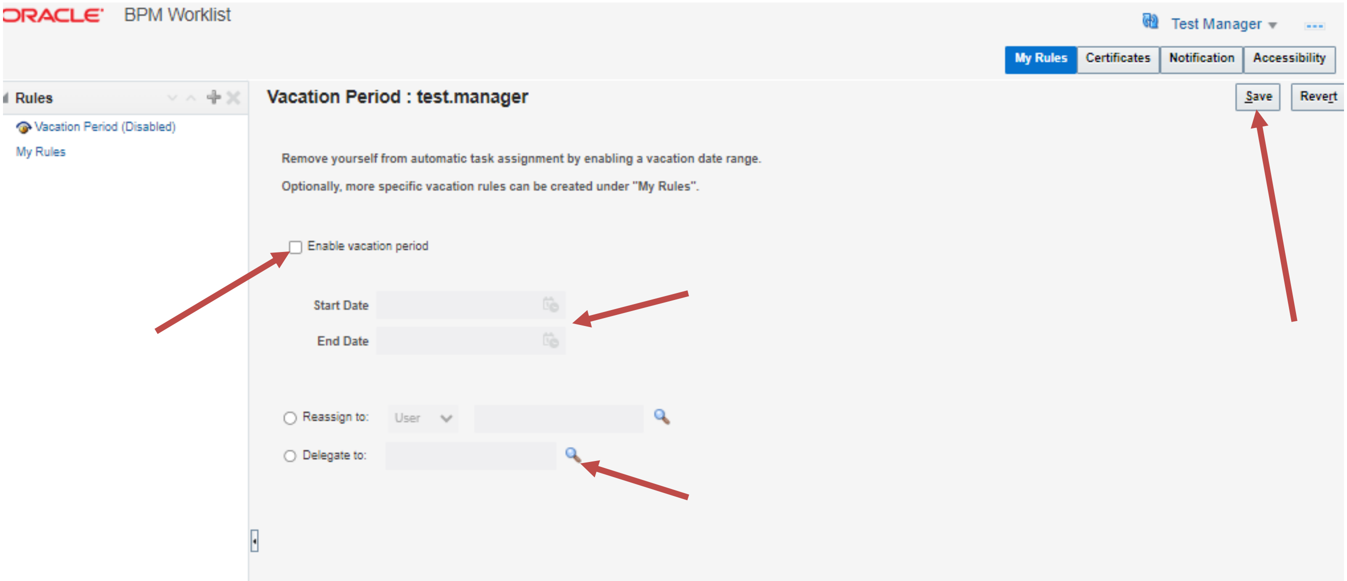


Click on the Worklist Button at the top right hand side of the screen

When the window opens click on your name and then select Preferences

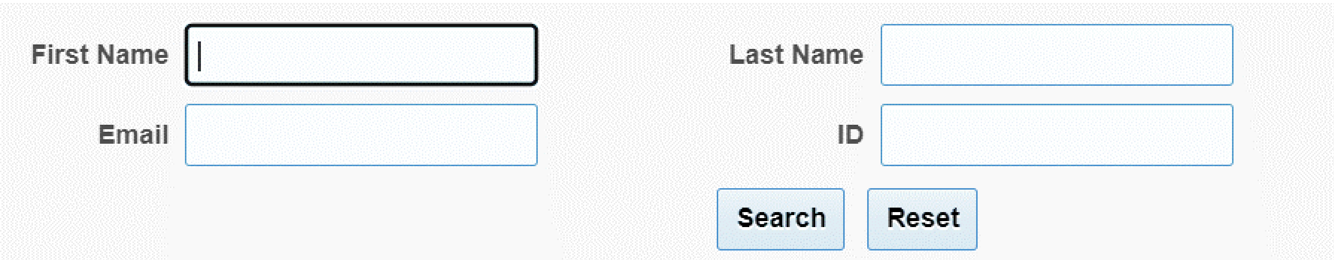


Once the screen opens, click on the ‘Enable Vacation Rule’, add the start and end dates and then use the little search icon to find the person you want to delegate to and click save

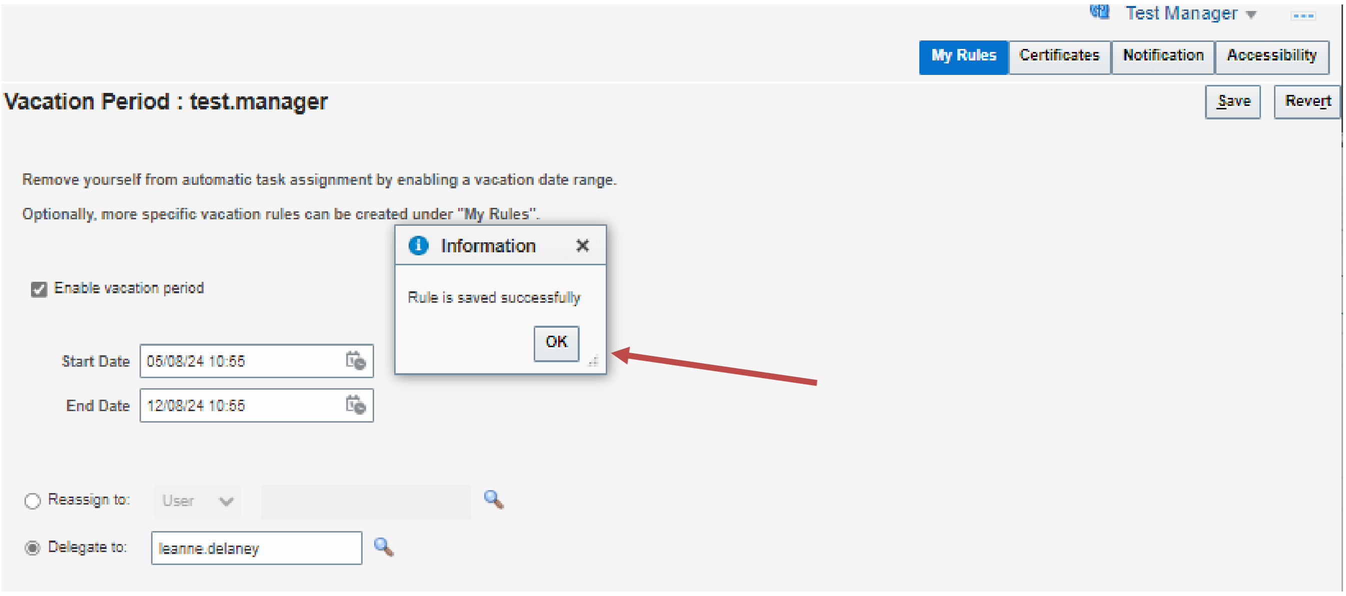


Searching

for Users to Transfer Notifications to It is imperative that you select the correct user to transfer you requests to. This field requires the User ID to be entered and this is not always obvious, and there is the risk of selecting the wrong user where several users have similar names. It is advisable to use the search button as this will allow you to search First and last name as well as email address.



Once you vacation rule is set, you should receive a message that your rule was saved successfully



Please Remember: Once your rule is set up it can be enabled again, all you have to do is change the dates

General Information

When to use a Vacation Rule

A Vacation rule will automatically forward any approval requests that are sent to you on to another person who can action them for you.

Although they are called Vacation rules, they can be used for any period that you are unable to access the system to deal with notifications. This could be a short as few hours if you have critical approvals coming through the system.

Who to delegate to

The person you choose to transfer your requests to is important. You need to choose someone who is at a similar level or higher in the organization. You also need to choose someone who is going to be available to respond in a timely manner and understands how to respond to the requests.

You should discuss your intention with them before the rule is activated, to ensure they are willing and able to act on your behalf.

Delegation: This forwards a request on to someone else to approve, but they are acting on your behalf and will use your approval rights to perform the action. They are effectively acting for you, and you retain responsibility for the approval.

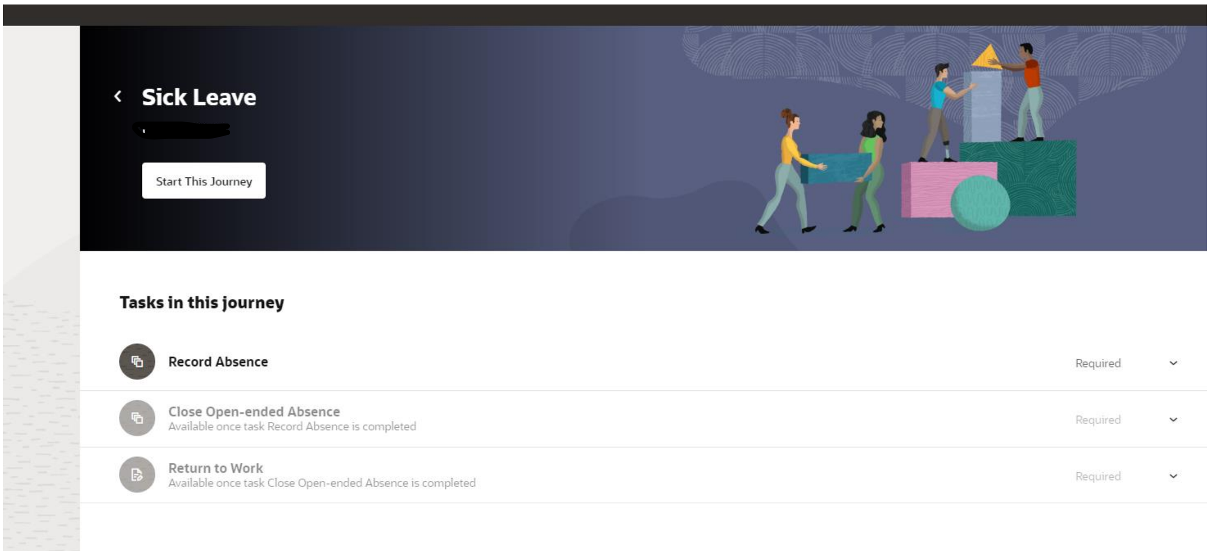
Procurement requests for approval need to be Delegated, to ensure the approval remains in the charge account structure of the original request.

11.0 Coming Next

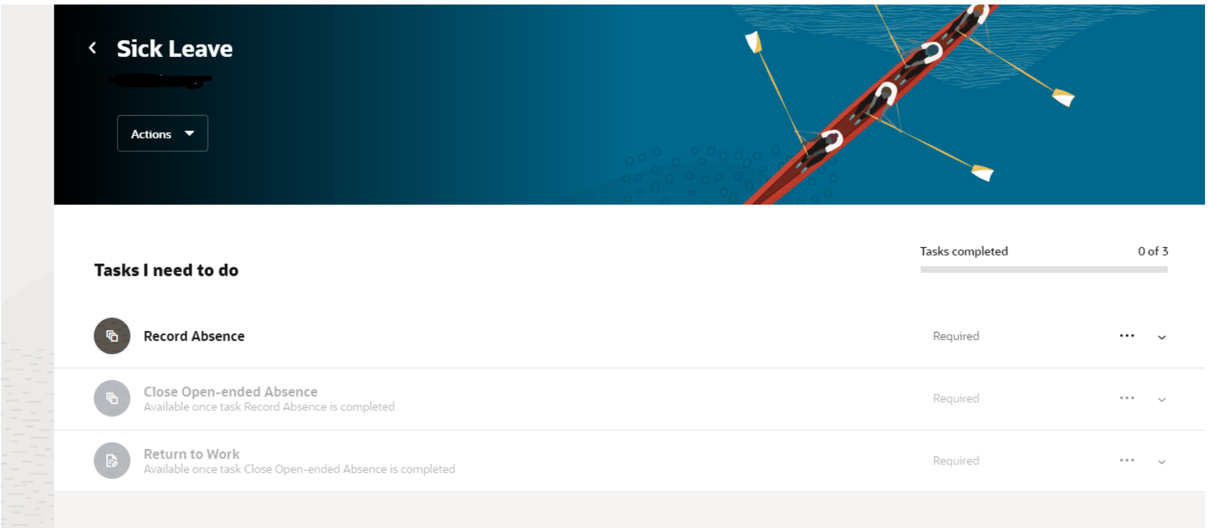
Sickness Journey's - We are introducing a new way of updating sickness absences on behalf of staff, making it easier to remember the next steps in the absence journey

Navigate to My Team

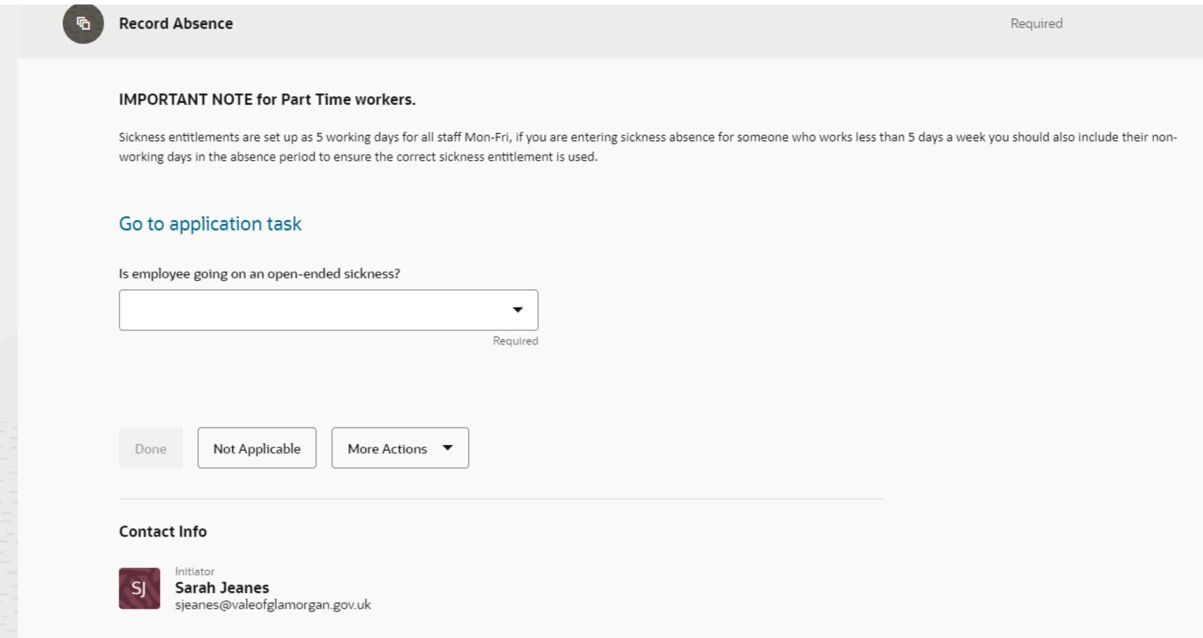
Select Add absence



Click on start this journey



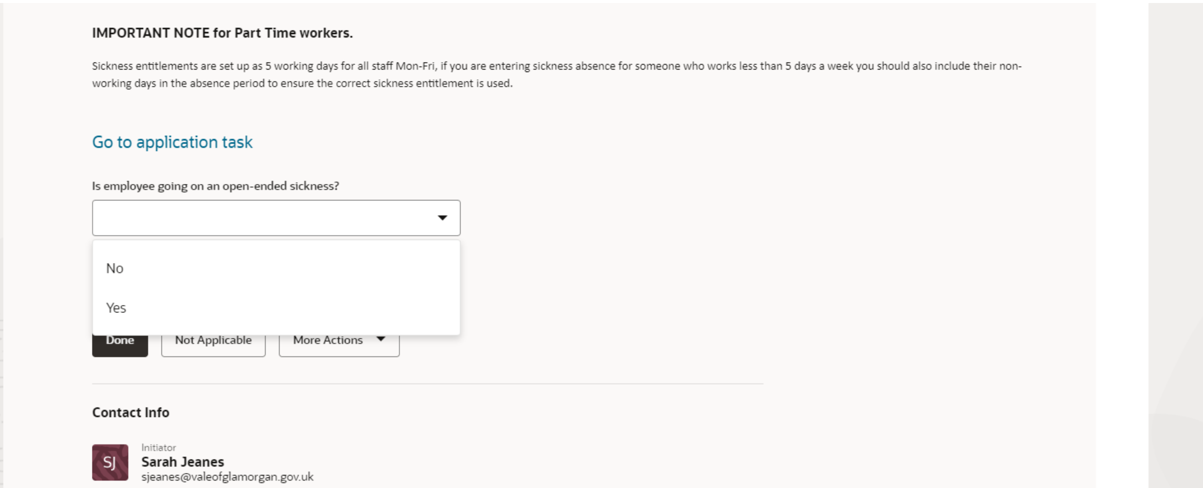
Click on the down arrow in Record absence, select Go to application task



Add the absence and submit

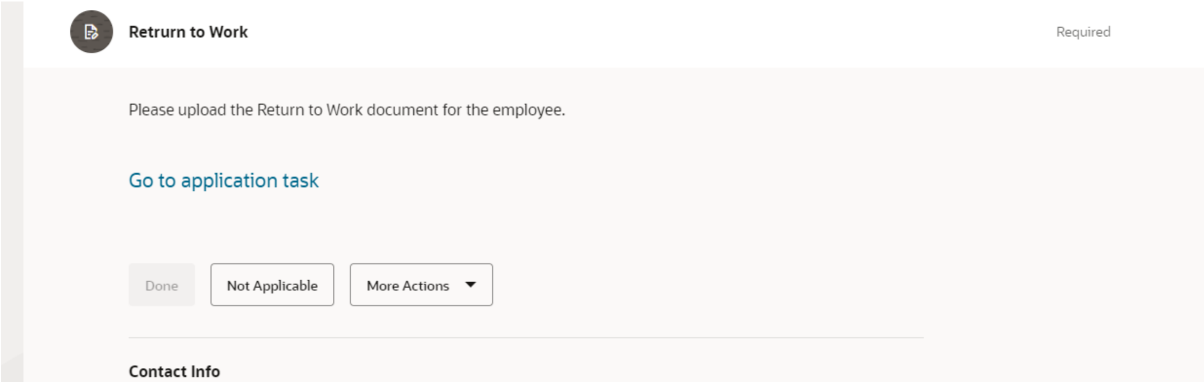
Click on the back button in absence

Answer the question and click done



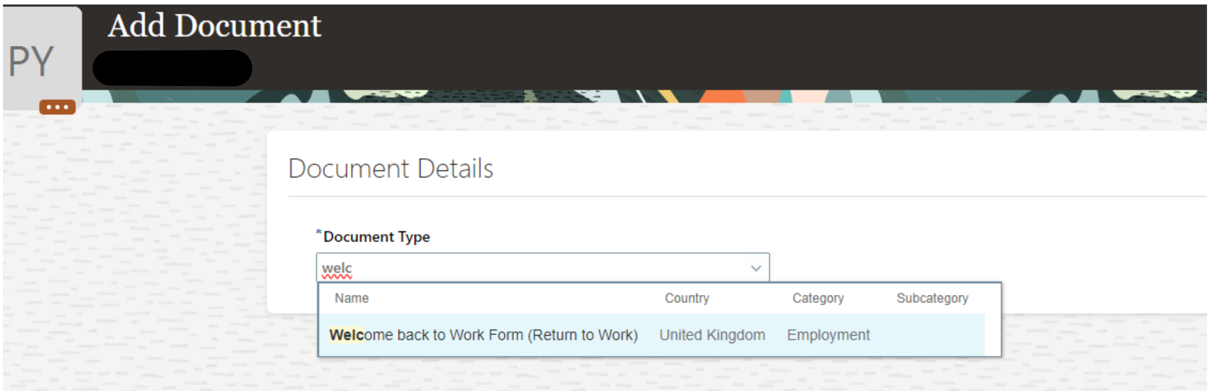
if no, this task is now complete and you will see the next task come up

Return to work, (you also have a notification on your bell to complete this task). click on the down arrow, click on Go to application task



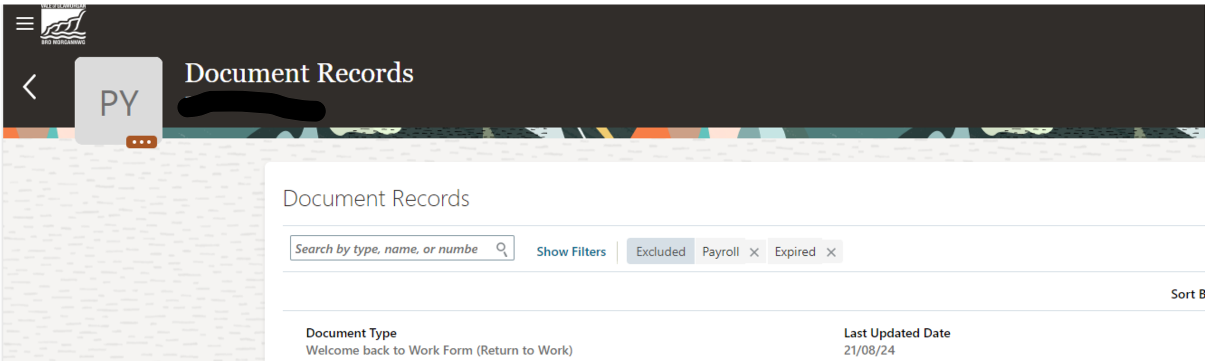
This takes you to document records, click on the Add button

Find the Welcome back to work form and select

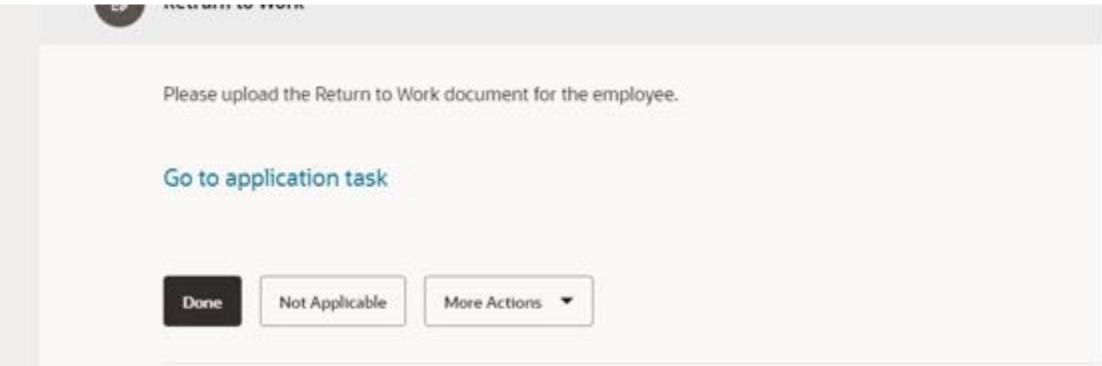


Complete the sections, including selecting the absence applicable and submit

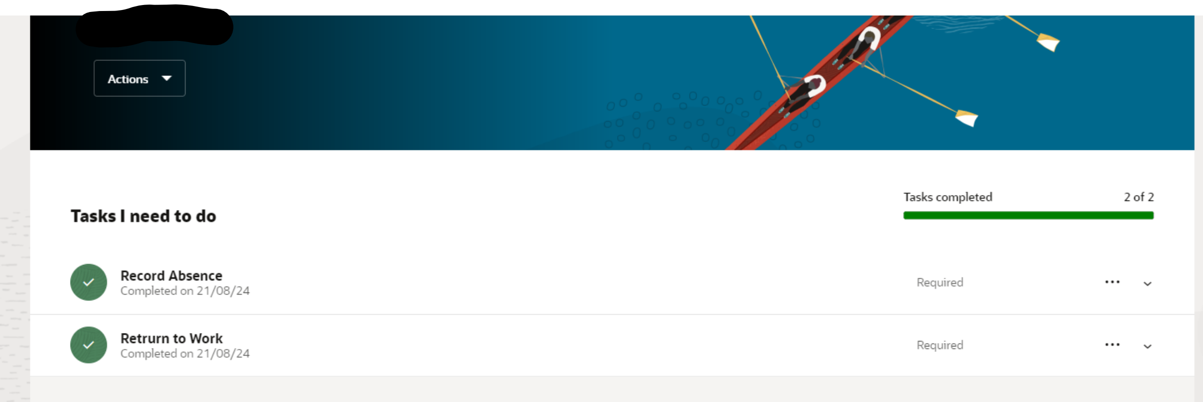
Click on the back arrow



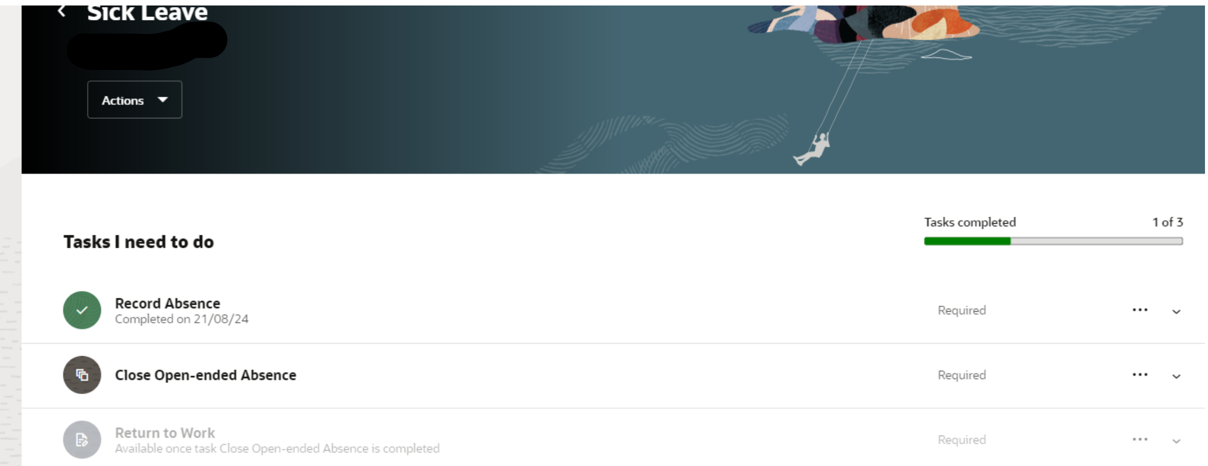
This returns you to the journey page and click on done



The journey now shows 2 of 2 tasks completed



If it is an open ended absence and you say Yes to that question and then done. It creates a new task to close the open-ended absence (a number of managers are forgetting to do this)

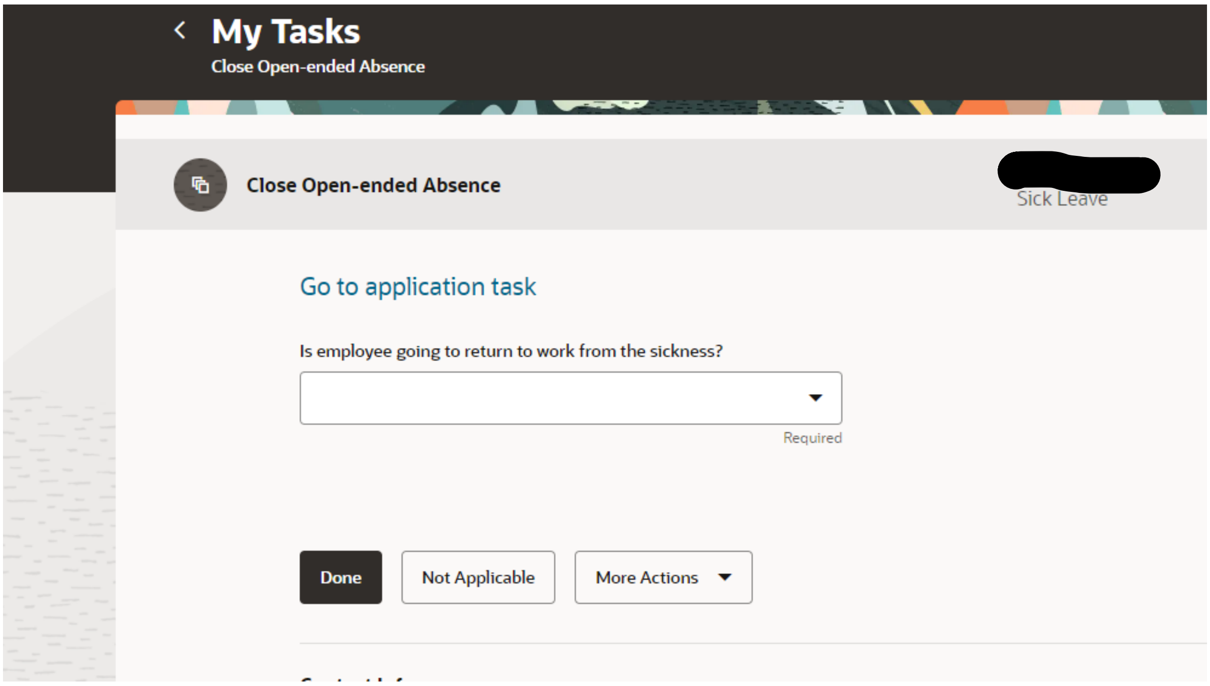


You will also find these tasks assigned to you on your bell. When you are ready to close the absence, go to your bell, click on the task and access the task, this will take you to the close open-ended absence task

Click on to go the application

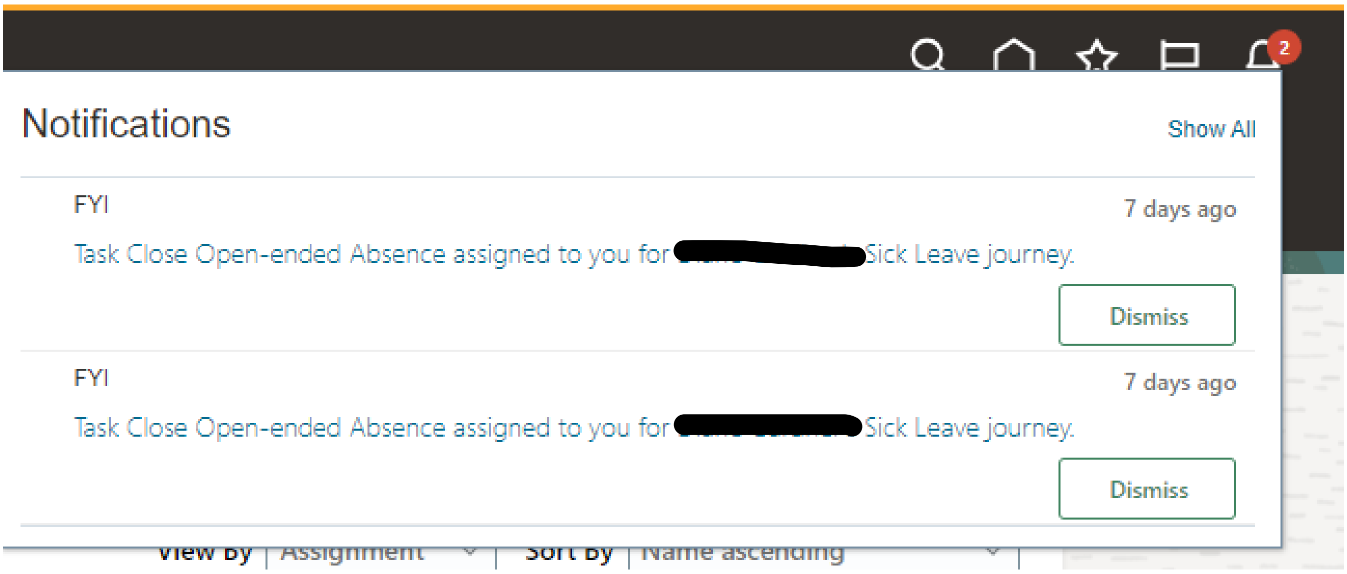
Edit the sickness absence to add the end date, submit

Click on the back arrow. You now have a question is the employee going to return to work from sickness, select yes and done



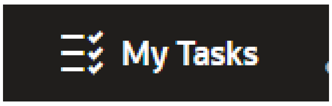
It will then take you to the welcome back to work form as above.

Your Bell will also show you tasks assigned to you which need to be completed. You can either click on the writing to go to the task, or if you have completed the task click on Dismiss



You can also look at your outstanding tasks under the Journeys tile on My Teams

And click on My Tasks at the bottom of the page



12.0 Coming Soon

Redwood – the introduction if Redwood in Sep / Oct this year, may make parts of Fusion look slightly different, this functionality is being introduced to allow greater flexibility within the system.

Birthday to Birthday annual leave – we are looking to introduce a birthday-to-birthday annual leave solution in the coming months, to allow everyone to use Fusion to book annual leave

Line manager dashboards – Line manager dashboard will be available, with information on starters, leavers, sickness, turnover and equality data for your teams