Approval Hub (HR & Ops Suite)

Overtime End-User & Configuration Guide

Version 2.0.3

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1. Introduction to Approval Hub (HR & Ops Suite)

The Approval Hub (HR & Ops Suite) is a comprehensive platform for enterprise workforce management. Within this ecosystem, the **Overtime Module** stands as a key component, engineered to provide a robust, automated framework for the end-to-end management of overtime requests. By shifting from manual processes to this unified digital environment, the module centralizes request submissions, automates approval workflows, and ensures rigorous compliance with organizational compensation policies.

The Overtime module empowers teams to:

- **Streamline Submissions:** Provide a clear, step-by-step digital process for employees to log overtime, attach business justifications, and link tasks to specific projects.
- **Automate Compliance:** Enforce organizational rules dynamically, with automatic calculation of net hours, multipliers, and policy-based compensation rates (Paid or TOIL).
- **Ensure Transparency:** Offer real-time visibility for both employees and managers, from initial request through to final approval and audit reconciliation.

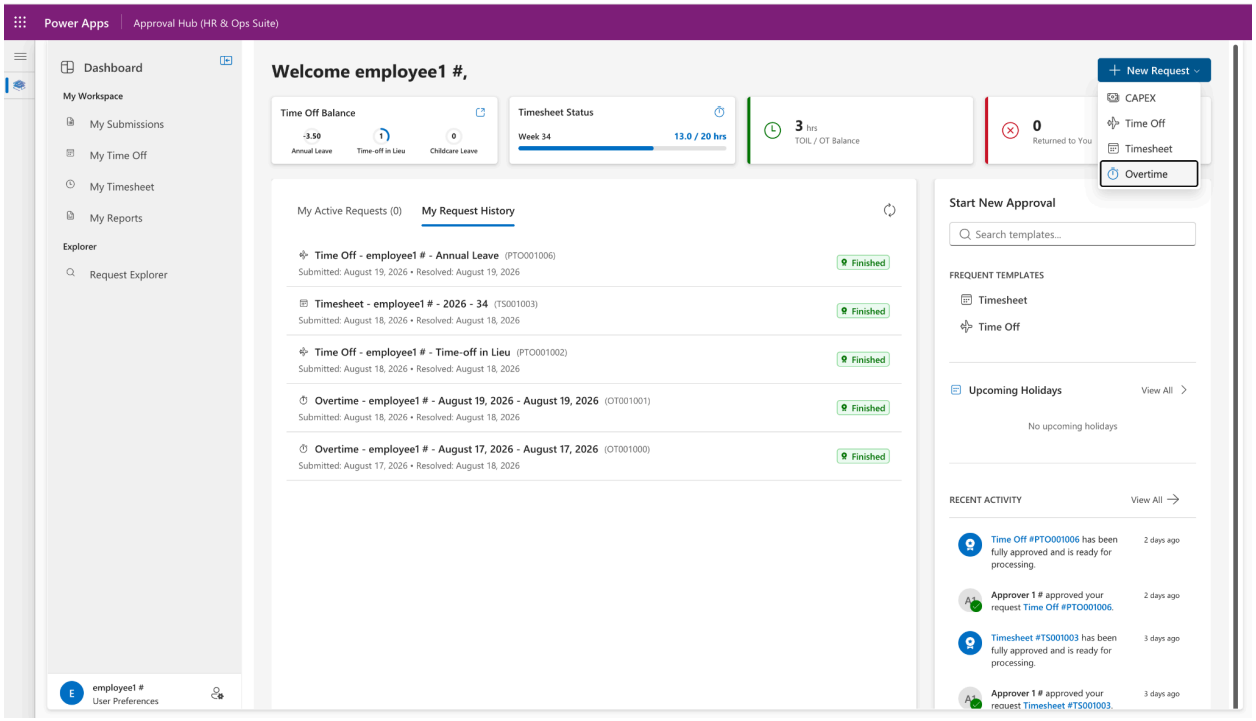
This guide is structured to address the needs of two key audiences:

- **End-Users:** Focused on the employee experience, this section covers dashboard navigation, the submission process, and tracking request statuses within the Request Center.
- **Administrators:** Focused on governance and configuration, this section details how to define compensation policies, maintain working schedules, and manage the parameters that drive automated policy adherence.

By integrating Overtime management into the broader Approval Hub suite, organizations ensure that all labor data is accurate, auditable, and fully aligned with corporate standards.

2. End-User Guide: Step-by-Step

2.1. Dashboard Overview



The Dashboard acts as your personal command center within the Approval Hub. It provides a real-time summary of your current workloads, time-off balances, and recent submission statuses, allowing you to manage your daily HR and operational tasks efficiently.

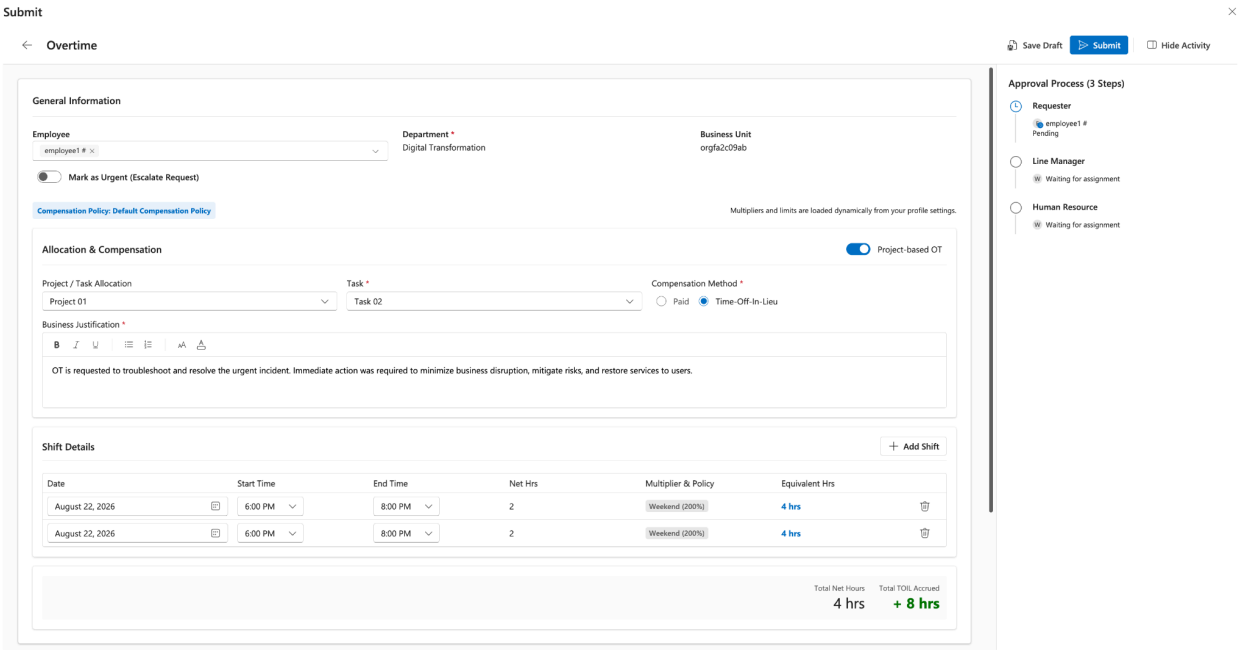
Key Dashboard Components:

- **Left Navigation Menu:** Use the side panel for quick navigation across your workspace:
    - **My Submissions:** Access the Request Center to view, filter, and manage all your historical and active submissions.
    - **My Time Off / My Timesheet / My Reports:** Jump directly into specific modules for leave management, timesheet logging, or analytical reporting.
- **Key Status Metrics (Top Cards):** These cards provide an instant health check on your work status:
    - **Time Off Balance:** A summary of your current remaining leave days, including Annual Leave, TOIL, and other leave categories.
    - **Timesheet Status:** Displays your progress toward your required weekly working hours (e.g., "13.0 / 20 hrs").

- **TOIL / OT Balance:** Highlights your total banked overtime or time-off-in-lieu hours available.
- **Returned to You:** Indicates requests that have been sent back for correction or require additional information.

- **New Request Center (Right Sidebar):**
  - **+ New Request:** Click this primary button to launch the selection menu for creating new submissions, including Overtime, Time Off, Timesheet, or CAPEX requests.
  - **Frequent Templates:** Utilize shortcuts for your most commonly used forms to expedite your workflow.
- **Request Management & Activity Feed:**
  - **My Active Requests / My Request History:** Use these tabs to toggle between your ongoing submissions and past, completed requests.
  - **Recent Activity Feed:** A dynamic log that shows real-time updates and notifications regarding your requests (e.g., approval confirmations or status changes), ensuring you stay informed without needing to open individual request files.

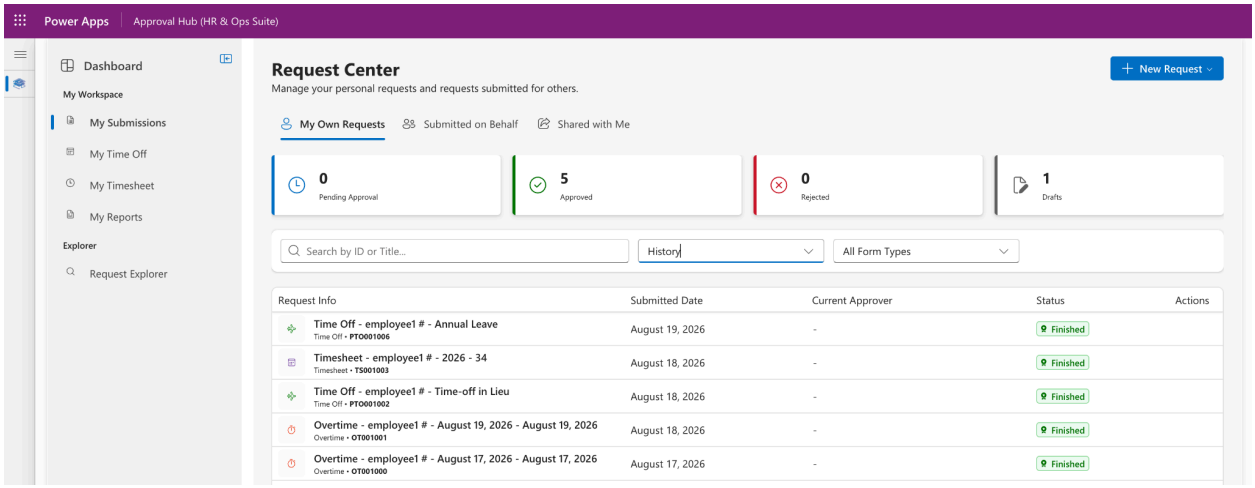
2.2. Creating and Submitting an Overtime Request



The Overtime request form is designed to capture necessary details while automatically calculating your compensation based on company policy. Follow these steps to ensure your request is submitted accurately:

1. **Initiate the Request:** From your main Dashboard, click the **"+ New Request"** button in the top-right corner and select **"Overtime"** from the menu.
2. **General Information:**
    a. Verify that your employee and department details are correctly populated.
    b. **Mark as Urgent:** If your overtime is required to troubleshoot an immediate issue or mitigate significant business risk, toggle this switch to prioritize the request for approvers.
3. **Allocation & Compensation:**
    a. **Project-based OT:** Toggle this switch if your overtime is directly attributable to a specific project.
    b. **Project / Task Allocation:** Use the dropdown menus to link your overtime to the appropriate project and task.
    c. **Compensation Method:** Select your preferred outcome: **Paid** (monetary compensation) or **Time-Off-In-Lieu** (accruing hours for future leave).
    d. **Business Justification:** This field is mandatory. Provide a concise, professional explanation for the overtime, detailing the business needs or incidents that required the extra hours.
4. **Shift Details:**
    a. Click the **"+ Add Shift"** button to create a new entry.
    b. Select the **Date**, **Start Time**, and **End Time**.
    c. The system will automatically calculate your **Net Hrs**, apply the correct **Multiplier & Policy** (e.g., Weekend or Holiday rates), and display the **Equivalent Hrs** accrued. You can add multiple shifts if your overtime spans different days or time blocks.
5. **Review & Submission:**
    a. **Approval Process:** Before submitting, check the "Approval Process" sidebar on the right of the screen. This panel provides transparency by showing the specific approvers who will review your request.
    b. **Save or Submit:** Click **"Save Draft"** if you need to gather more information and return to the request later, or click **"Submit"** to formally enter your request into the approval workflow.

2.3. Request Center (My Submissions)



The Request Center serves as your personal command hub for tracking and managing the lifecycle of your submissions. This central area provides comprehensive visibility into all your requests, whether they are in progress or completed.

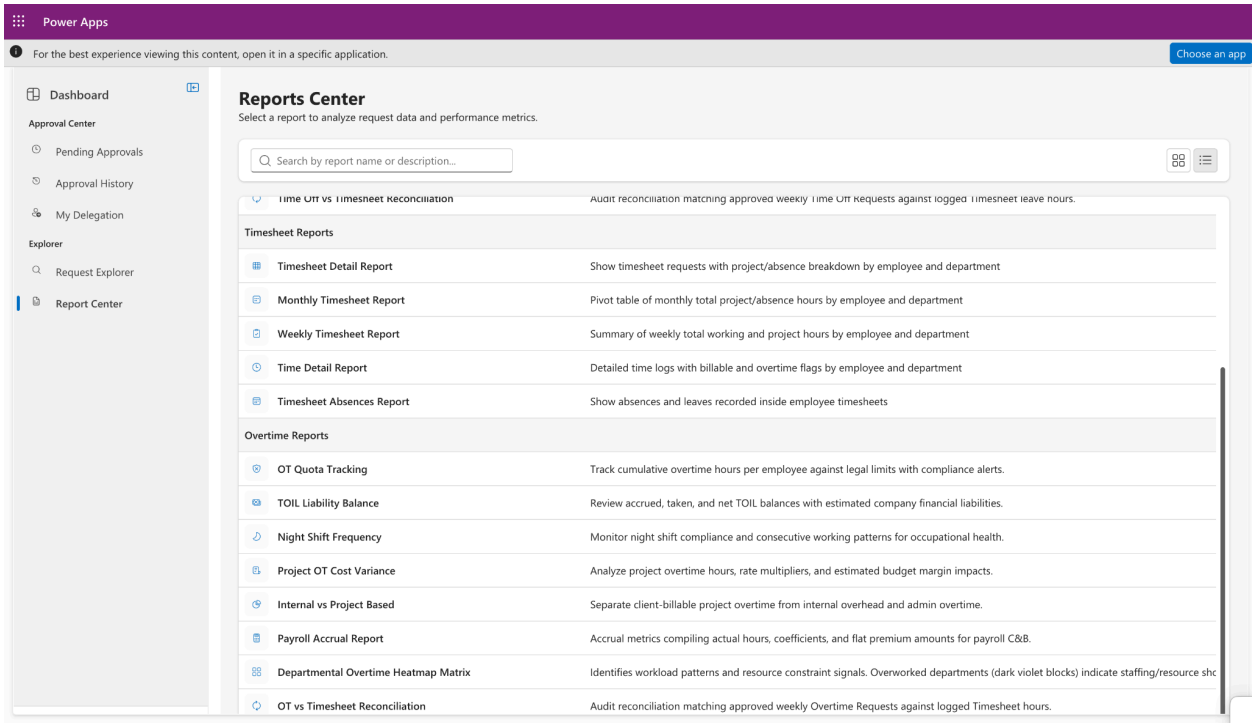
Key Features of the Request Center:

- **Submission Tabs:**
    - **My Own Requests:** View a list of all requests you have personally submitted.
    - **Submitted on Behalf:** Track requests you have created or submitted on behalf of other team members.
    - **Shared with Me:** Access any requests that have been explicitly shared with you for visibility or collaboration.
- **Status Dashboard:** Instantly view the health of your requests via the top-level cards, which summarize your items by status:
    - **Pending Approval:** Requests awaiting action from a manager or HR.
    - **Approved:** Successfully processed requests.
    - **Rejected:** Requests that were declined or require resubmission.
    - **Drafts:** Unsubmitted or saved progress items.
- **Smart Search & Filtering:**
    - **Search Bar:** Quickly locate specific requests by entering their unique ID or title.
    - **Status Toggle:** Use the dropdown menu to filter between "Active" (ongoing/pending) and "History" (completed/archived) requests.

- **Form Type Filter:** Narrow down your list by selecting specific categories like "Overtime," "Time Off," or "Timesheet" to find exactly what you need.

- **Request List View:** The data table provides a granular breakdown of your records, including the specific **Request Info**, **Submitted Date**, the **Current Approver** assigned, and the overall **Status** of each item.
- **New Request:** Click the **'+ New Request'** button in the top right corner to instantly jump to the submission form for any category.

2.4. Reports (For manager)



The Reports Center provides managers and administrators with analytical tools to track performance, compliance, and budget impacts related to overtime. You can access these reports by navigating to "Report Center" in the left-hand menu.

Below are the specialized reports available for monitoring overtime:

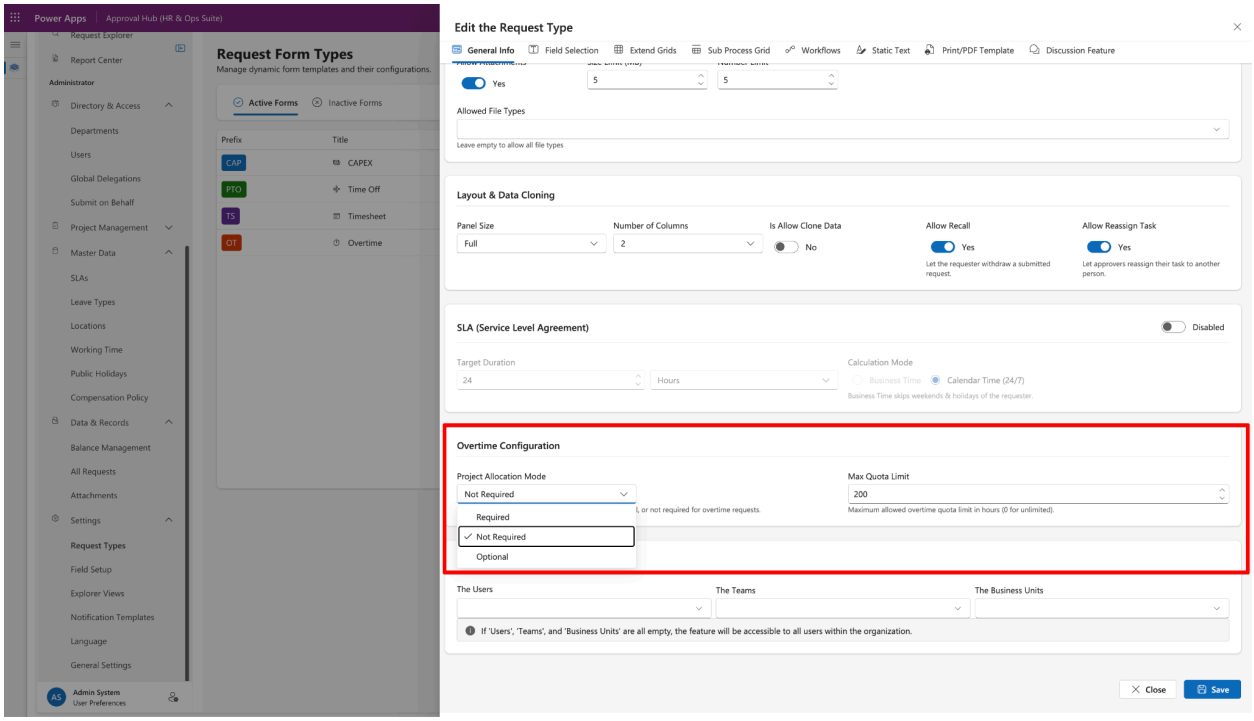
- **OT Quota Tracking:** Monitor cumulative overtime hours per employee against legal or policy limits, including automated compliance alerts.
- **TOIL Liability Balance:** Review accrued, taken, and net Time-Off-In-Lieu (TOIL) balances to estimate company financial liabilities.
- **Night Shift Frequency:** Track night shift patterns to ensure compliance with occupational health and safety regulations.

- **Project OT Cost Variance:** Analyze project-specific overtime hours, rate multipliers, and estimated budget margin impacts.
- **Internal vs Project Based:** Differentiate between client-billable project overtime and internal overhead or administrative overtime.
- **Payroll Accrual Report:** Compile actual hours, coefficients, and flat premium amounts for payroll and C&B (Compensation & Benefits) processing.
- **Departmental Overtime Heatmap Matrix:** Visualize workload patterns and identify resource constraints (e.g., dark violet blocks indicate high-stress staffing areas).
- **OT vs Timesheet Reconciliation:** Perform audit reconciliations by matching approved weekly Overtime Requests against logged Timesheet hours.

3. Configurations

This section outlines the essential administrative setups required to define overtime policies, working schedules, and employee-specific settings.

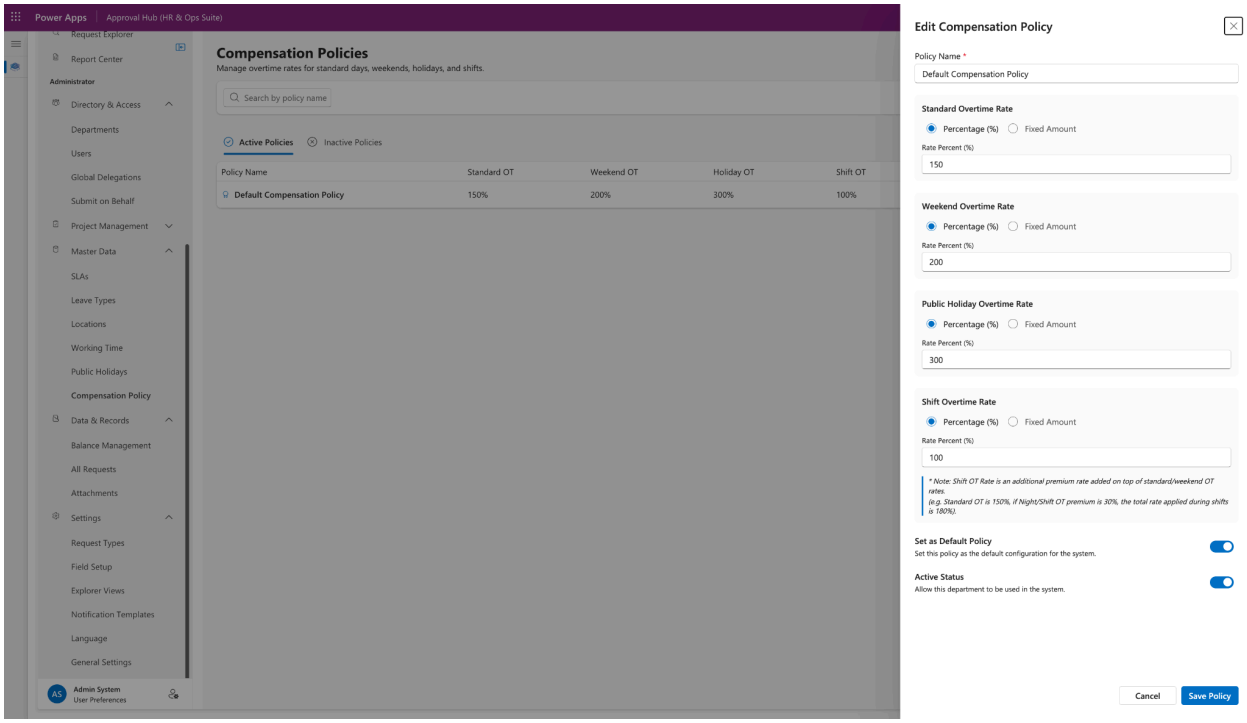
3.1. Overtime Form Configurations



Administrators can define the behavior of the Overtime request form to align with internal project management requirements.

- **Project Allocation Mode:** Control whether users must link overtime to a project. Options include:
    - **Required:** Users must select a project/task to submit an OT request.
    - **Not Required:** No project selection is necessary.
    - **Optional:** Users may choose to link a project but it is not mandatory.
- **Max Quota Limit:** Set the maximum number of overtime hours an employee can accrue (input '0' for unlimited).

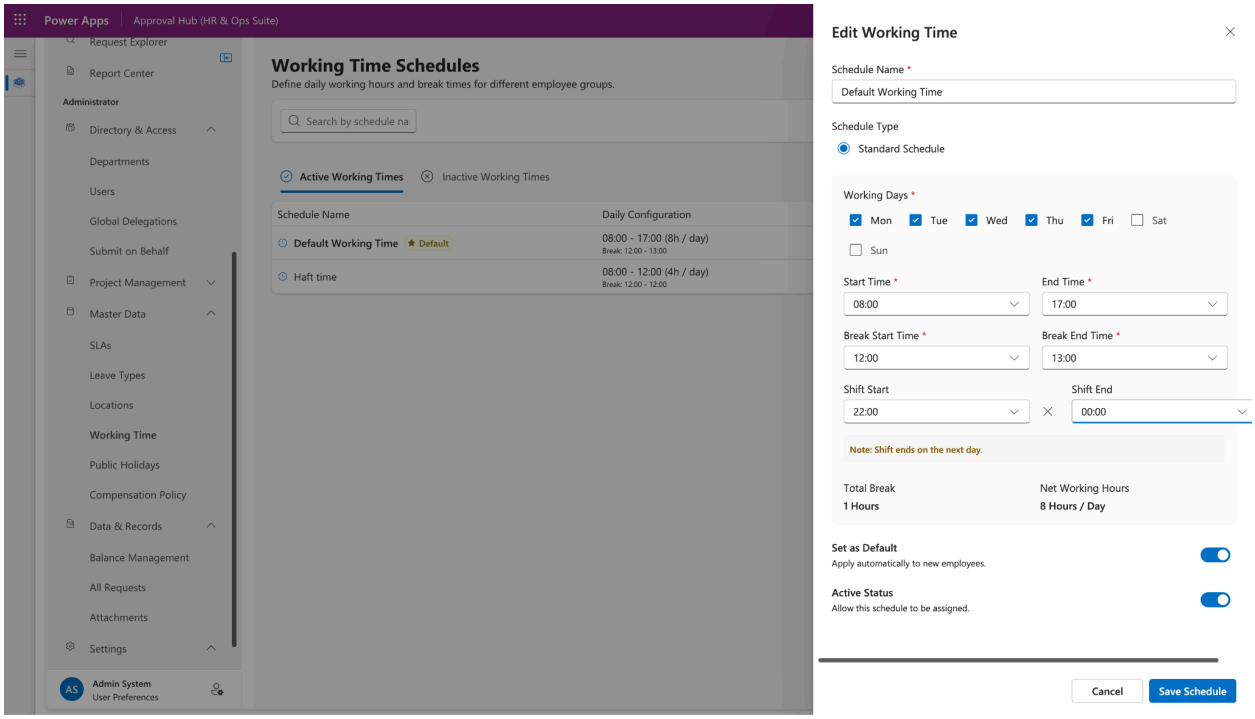
3.2. Compensation Policies



Define how overtime hours are monetized or converted into time-off.

- **Rate Settings:** Configure percentage-based or fixed-amount multipliers for:
    - **Standard Overtime Rate:** Base OT rate.
    - **Weekend Overtime Rate:** Premium applied during weekends.
    - **Public Holiday Overtime Rate:** Premium for holiday work.
    - **Shift Overtime Rate:** Additional premiums added for specific shifts.
- **Policy Assignment:** Flag policies as "Default" to apply them automatically to new employees.

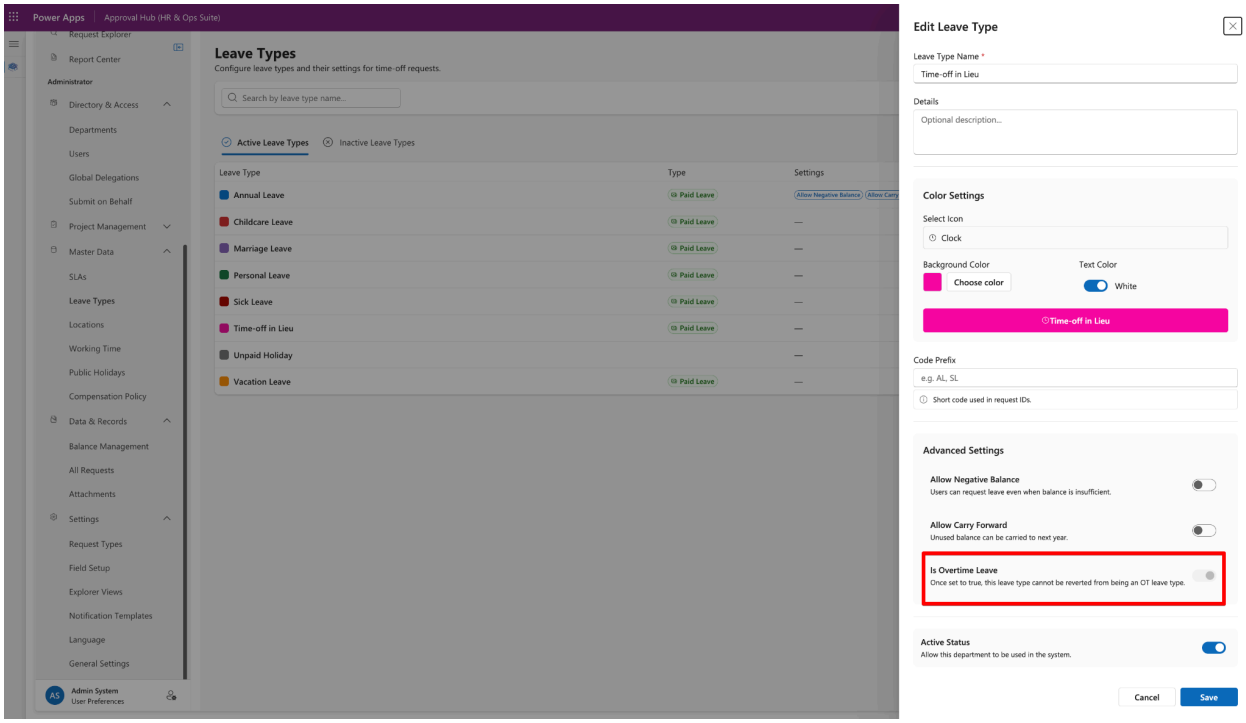
3.3. Working Time Schedules



Establish standard daily working hours to ensure accurate overtime calculations.

- **Schedule Definition:** Define "Working Days," "Start/End Times," and "Break Times."
- **Shift Definitions:** Configure specific shift start and end times to enable automated shift-based calculations.
- **System Defaults:** Mark specific schedules as the default for new employee assignments.

3.4. TOIL (Time-Off-In-Lieu) Setup



This section allows administrators to configure the parameters for Time-Off-In-Lieu, determining how accrued overtime hours are converted into usable leave types. Proper configuration here is essential for accurate leave balance tracking and policy enforcement.

Configuration Fields

To create or modify a TOIL-related leave type, configure the following fields in the 'Edit Leave Type' form:

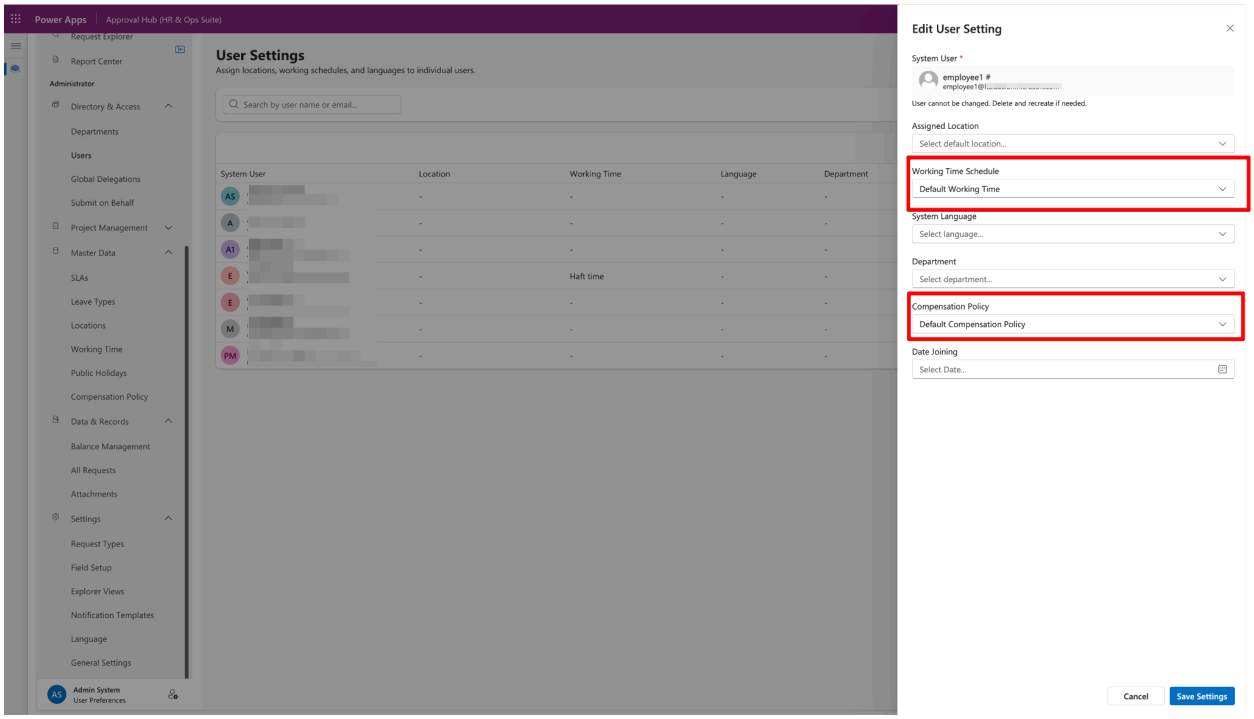
- **Leave Type Name:** Define the label (e.g., "Time-off in Lieu") that employees will see when requesting leave.
- **Details:** Provide a descriptive explanation of this leave policy for internal reference.
- **Color Settings:** Configure the visual representation of this leave type on dashboards and calendars:
    - **Select Icon:** Choose a representative icon (e.g., 'Clock').
    - **Background/Text Color:** Select colors that provide high contrast and easy identification in the UI.
- **Code Prefix:** Assign a unique code (e.g., "TL" or "OTL") used to generate request IDs and maintain data integrity in system logs.

Advanced Settings

These settings define the governance and flexibility of the leave type:

- **Allow Negative Balance:** Toggle this to 'On' if employees are permitted to book leave before they have fully accrued the necessary hours. If 'Off', users can only book leave up to their current available balance.
- **Allow Carry Forward:** If enabled, unused balances of this leave type can be carried over into the next fiscal or calendar year, depending on company policy.
- **Is Overtime Leave (Critical):** This toggle is the primary link between the Time Off module and the Overtime module. When enabled, this leave type is officially designated as 'Overtime Leave'.
    - **Important Note:** Once set to 'True', this leave type cannot be reverted or changed from being an Overtime leave type, ensuring the integrity of your accrued overtime accounting.

3.5. User Settings



The User Settings module allows administrators to map organizational policies (Working Time and Compensation) to specific employees. Properly maintaining these settings is vital, as they serve as the foundational parameters for automated overtime calculations and leave accruals.

Configuration Fields

When editing an individual user's profile, the following parameters are available:

- **System User:** Displays the identity of the employee. Note that the user identity cannot be changed once created; it must be deleted and recreated if necessary.
- **Assigned Location:** Define the geographic or site-specific location for the employee, which may impact holiday calendars or regional compliance rules.
- **Working Time Schedule:** Select the predefined schedule that governs the employee's standard working hours. This setting directly affects the system's ability to calculate overtime eligibility.
- **System Language:** Sets the preferred interface language for the user.
- **Department:** Assign the user to the correct organizational unit for reporting and hierarchical approval structures.
- **Compensation Policy:** Link the user to the appropriate compensation rule set (e.g., 'Default Compensation Policy'). This ensures that when the user submits an OT request, the correct multipliers (standard, weekend, holiday) are automatically applied.
- **Date Joining:** Record the employee's start date, which can be utilized for tenure-based reporting or policy eligibility tracking.

Always click **'Save Settings'** after making any modifications to ensure the updates are applied to the user's future requests.

4. Additional Resources

For advanced administrative configurations not covered in this guide—such as setting up global delegations, configuring notification templates, managing system languages, or customizing request explorer views—please consult the comprehensive system documentation provided below:

- Administrator Guide
- End-User & Approver Manual