

Employee Self Service (ESS) User Guide

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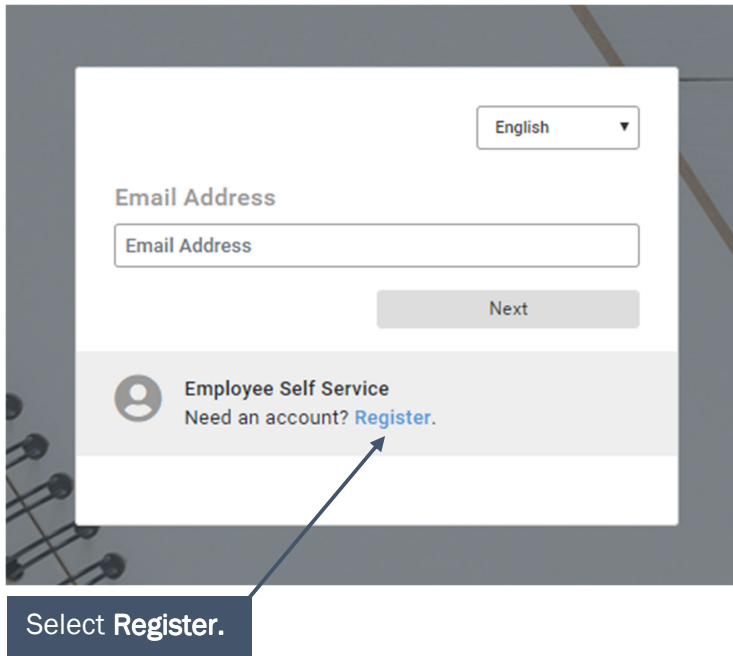
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1. Employee Self Service

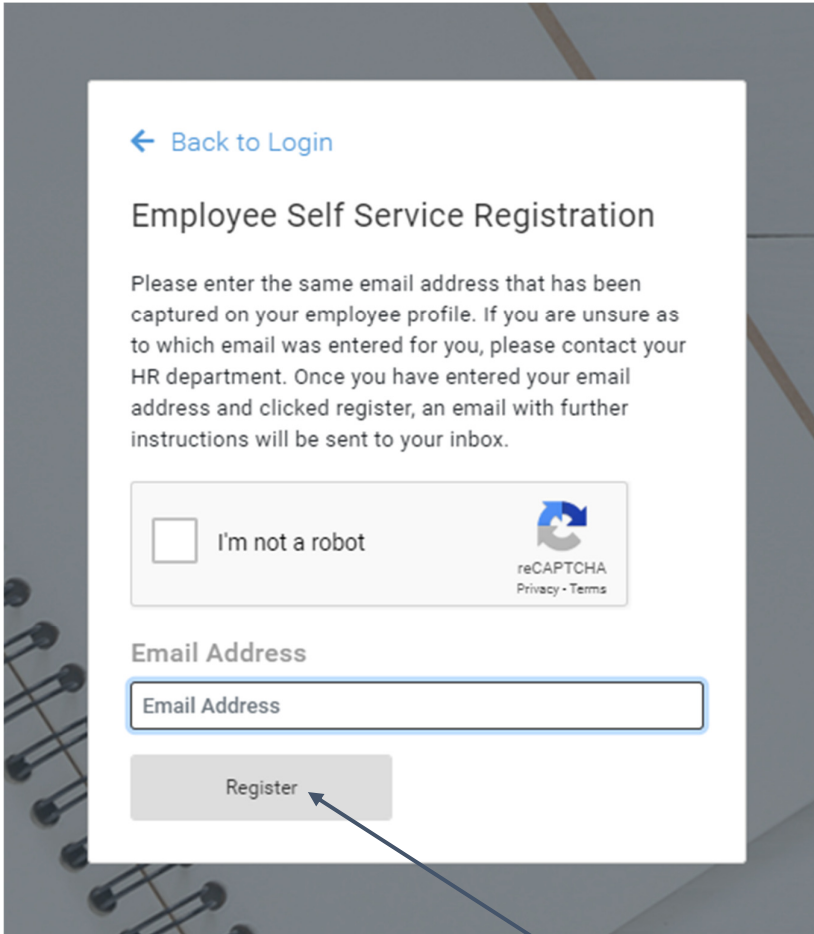
Employee Self Service (ESS) functionality allows the employee to log in as a user and access screens that are relevant to the employee.

i. ESS Registration

Before an employee can access ESS, the user must capture an active e-mail address on the Basic Profile Screen. Thereafter, the employee can register for ESS using the same e-mail address. The employee can register as an ESS user via the Login Page.




The employee will complete the Recaptcha requirements and e-mail address. Thereafter the employee will select **Register**.



[← Back to Login](#)

Employee Self Service Registration

Please enter the same email address that has been captured on your employee profile. If you are unsure as to which email was entered for you, please contact your HR department. Once you have entered your email address and clicked register, an email with further instructions will be sent to your inbox.

I'm not a robot  reCAPTCHA
Privacy - Terms

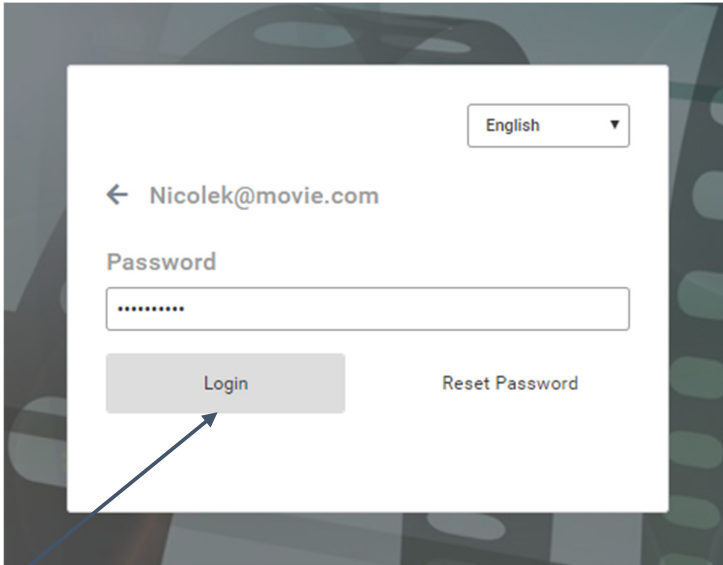
Email Address

Register

Complete the screen and select **Register**.

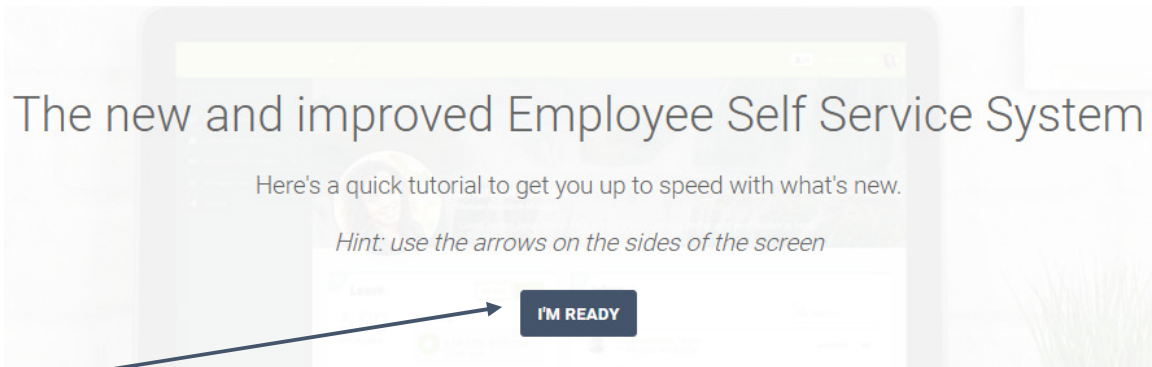
ii. What will happen when an ESS user logs in for the First Time?

After registering for ESS, the employee can log onto their ESS profile from the Login Page.

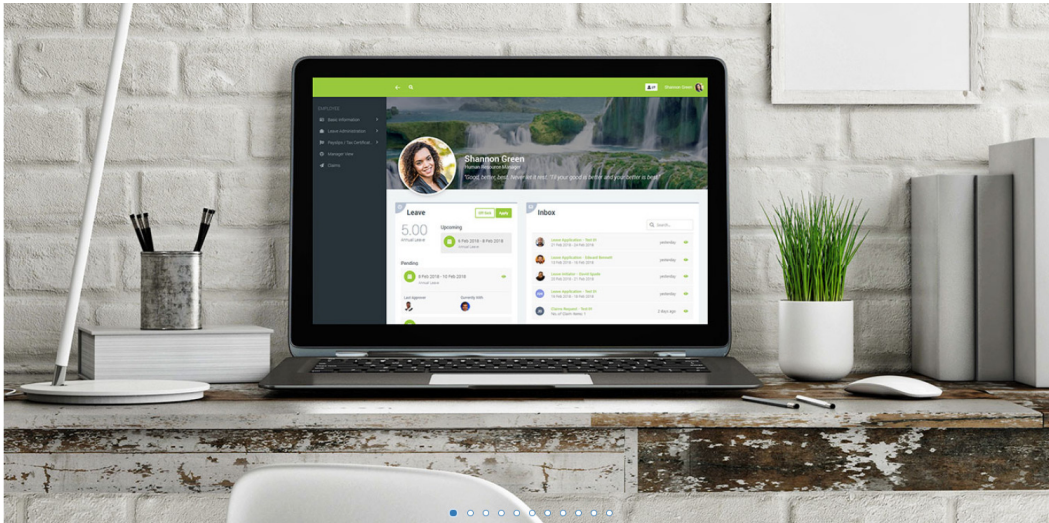


Complete the screen and select **Login**.

The initial entry screen will allow the employee to scroll through ten slides highlighting the features available on the ESS portal.



Select **I'm Ready**.



Proceed to the new and improved ESS Portal

Select the arrow to scroll through the tutorial.

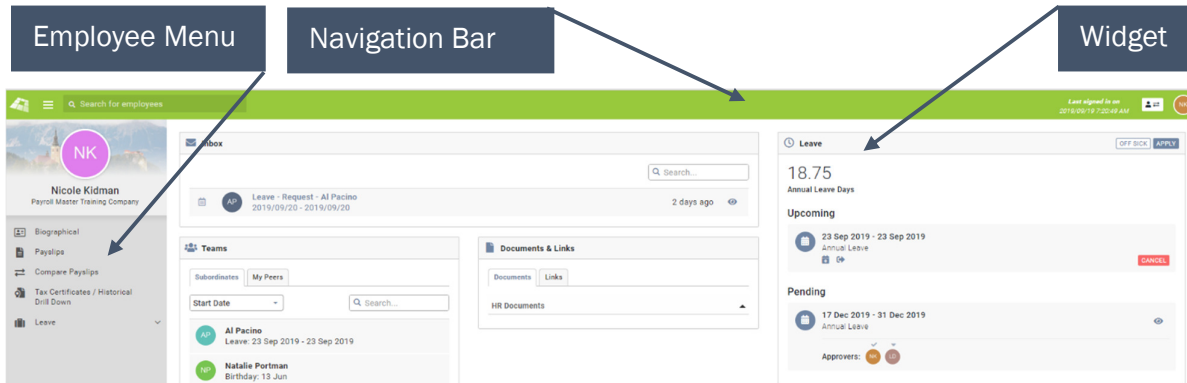


Tip

The prompt to view the tutorial of the ESS portal is only available the first time the employee logs onto the system. Thereafter the employee will be directed to the ESS Dashboard upon logging in. The tutorial can be downloaded in PDF format from the Knowledge Base.




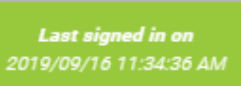


iii. The ESS Dashboard

The ESS Dashboard consists of the navigation bar, employee menu and widgets.



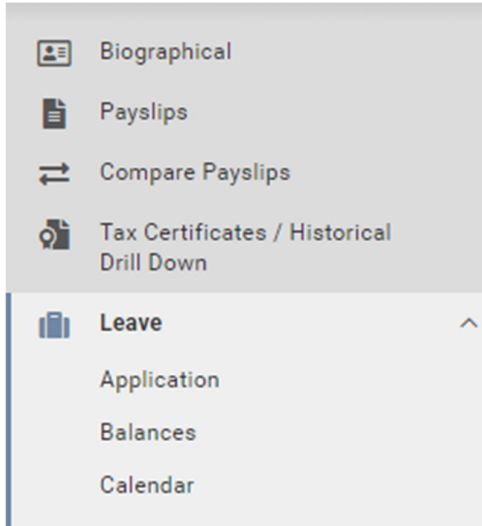
a. Orientation of the Navigation Bar



| Field | Explanation |
|---|---|
|  | The logo will reflect. Select the logo to navigate back to the ESS Dashboard. |
|  | Select the Toggle menubar to expand the Widgets and collapse the Employee Menu. The Employee Menu will still be visible when hovering over it. |
|  | Select this option to search the Employee Directory. By default, this will include all employees within a group of companies. |
|  | The last signed in date will reflect. |
|  | For managers with employees reporting to them, Act on behalf of will be available to access screens of the employees reporting to them. Manager Self Service will have to be set-up on company level for this functionality to be available. |
|  | The employee can select his/her initials to access the Basic Profile Screen, Settings or to Sign Out. |

b. Orientation of the Employee Menu

By default, the Employee Menu will include the following screens:



Tip

The default screens and permissions can be changed on company level.

c. Orientation of the Widgets

Widgets have been designed for Leave, Payslip, Claims, Inbox, Teams as well as Documents & Links.



Tip

By default, all six widgets will be visible. A widget can be deactivated on company level.


Inbox Widget

The Inbox Widget displays workflow items that require approval by the manager. This will be the case if workflow processes for leave, timesheets or claims are set-up on company level. The manager will also receive an e-mail notification requesting action to be taken.






Leave Widget

The Leave Widget reflects the annual leave balance, upcoming leave that was approved as well as leave still in the process of being approved. The employee can access the Leave Application Screen by selecting **Apply** or **Off Sick**.



 **Leave**



18.75
Annual Leave Days




Upcoming

 **23 Sep 2019 - 23 Sep 2019**
Annual Leave
 

Pending

 **17 Dec 2019 - 31 Dec 2019**
Annual Leave 

Approvers:  

| Field | Explanation |
|---|---|
|  | Select to add the upcoming leave to a desktop or mobile calendar. |
|  | If granted access, managers can select Out of Office to nominate an alternate approver to action workflow items while on leave. |
|  | Select to view the progression of the workflow of a pending leave application. |
| <input type="button" value="CANCEL"/> | The employee may cancel an upcoming leave application. The leave transaction will be reversed, and both the employee and manager will receive an e-mail notification. |



Tip

An approved leave application not taken, can also be cancelled, from the Leave Application Screen. This screen can be selected from the Employee Menu. Since it is an approved past leave transaction, it will return through the workflow path.

Teams Widget

The Teams Widget displays an employee's subordinates and peers. **Subordinates** refer to all employees reporting to the user and **My Peers** refer to employees who report to the same manager as the user. The user can sort the column by the employees **Start Date** or **Last Name**.

The screenshot shows the 'Teams' widget with a header containing a group icon and the text 'Teams'. Below the header are two tabs: 'Subordinates' (active) and 'My Peers'. A dropdown menu is set to 'Start Date', and a search bar contains the text 'Search...'. The main content area displays two employee cards:

- AI Pacino**: Leave: 23 Sep 2019 - 23 Sep 2019
- Natalie Portman**: Birthday: 13 Jun

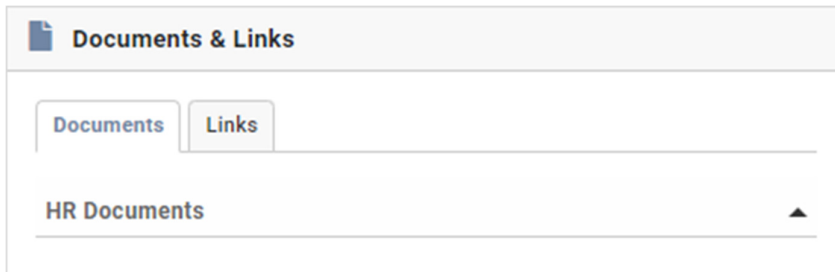
The employee can navigate to another employee's public profile by selecting the photo icon of the employee.

The screenshot displays an employee's public profile with the following sections:

- About**:
 - Email: al@movie.com
 - Work Number: 0829652146
 - Birth Date: 11 June
 - Group Join Date: 01 March 2017
- Managers**:
 - Nicole Kidman (Actor) - 2 👤
- Peers**:
 - Also reporting to Nicole Kidman
 - Natalie Portman (Actor)
- Company**:
 - Company: Payroll Master Training Company
 - Department: Acting
 - Cost Centre: Young Talent Agency
 - Employee Number: EMP0043
 - Frequency Name: Monthly
 - Leave: 23 Sep 2019 - 23 Sep 2019

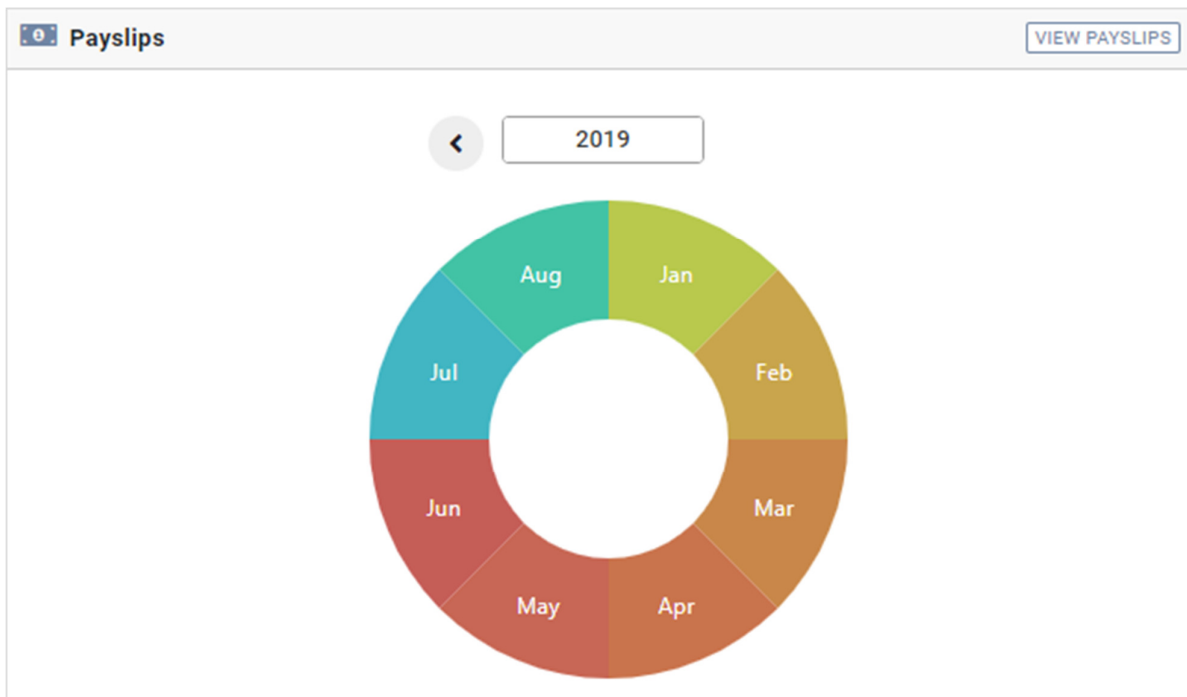
Documents & Links Widget

The employee can access any company related documentation or external website links that were uploaded on company level.



Payslip Widget

The employee can view a quick summary of a payslip by selecting a month. Alternatively, the employee can select **View Payslips** for more details.



Upon selecting a month, a short summary will display:

| August - 2019 | |
|--------------------------|-----------|
| Net Pay: | 22 073.82 |
| Gross Earnings: | 26 750.00 |
| Total Deductions: | 4 676.18 |
| Tax: | 4 527.46 |

Upon viewing the payslip, more details will display:



| August - 2019 | | August - 2019 | |
|---|-----------|--|---------------------------|
| Payslips / Detail | | | |
| Currency: ZAR Total Net Pay : 22 073.82 | | Email Download | |
| Allowances | | Deductions | |
| Basic Pay | 26 750.00 | Tax Paid | 4 527.46 |
| Commission | 0.00 | UIF Employer | 148.72 |
| | 26 750.00 | | 4 676.18 |
| | | | Total Net Pay : 22 073.82 |
| Company Contributions | | | |
| Skills Development Levy | 267.50 | | |
| UIF Employer | 148.72 | | |
| | 416.22 | | |

Claims Widget

If workflow functionality has been set-up for claims on company level, the employee will be able to submit claims for approval by selecting **Create**. The employee can also view claims that still need to be submitted for approval as well as claims already submitted.

Claims CREATE

In draft In workflow



| Date Captured ↓ | Status | |
|-----------------|-----------------|---|
| 16 Sep 2019 | To be Finalised |   |

Claim Details




| Component | Input Type | Input Value |
|----------------|----------------|-------------|
| Overtime @ 1.5 | Overtime Hours | 6.00 |

iv. ESS User's Settings

The employee can customise their public profile by selecting **Settings**.

  NK

Nicole Kidman

-  Profile
-  Settings
-  Sign Out

a. Region

The employee can select the language and format which will affect the language and date format when browsing the ESS portal. The employee can also select a time zone.

Settings

Region | Password | Banner | MFA

Region

Language and Format *

English (South Africa) ▾

2019/09/16 123 456.79

Current time zone *

(UTC+02:00) Harare, Pretoria ▾

Update

b. Password

The employee can change their password.

Settings

Region | Password | Banner | MFA

Password

Current password *

Current password

New password *

New password

ConfirmNewPassword

ConfirmNewPassword

Change Password

c. Banner

The employee can add a banner and quote to their public profile.


Settings

Region Password Banner MFA

Banner

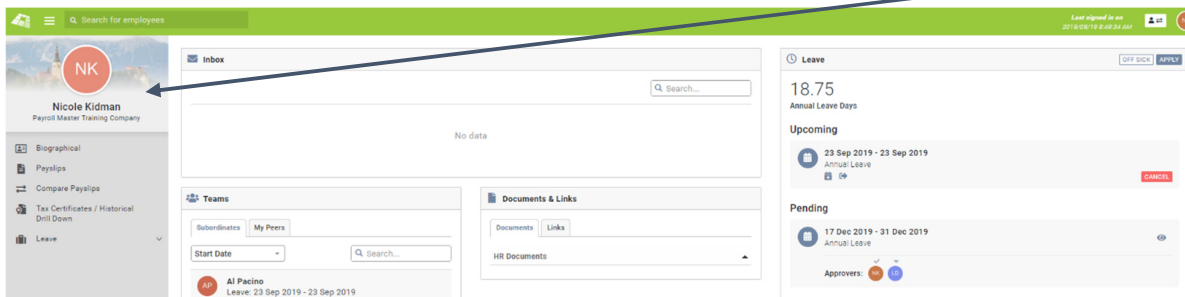
Quote
Carpe Diem!

Select file or Drop file here



Clear Banner Update

The employee's name, photo and banner will display in the top left corner.



The screenshot shows an employee dashboard for Nicole Kidman. The top left corner displays the employee's profile with a circular photo containing the initials 'NK' and the name 'Nicole Kidman' from 'Payroll Master Training Company'. Below the profile are navigation links for Biographical, Payslips, Compare Payslips, Tax Certificates / Historical Drill Down, and Leave. The main dashboard area includes an 'Inbox' with a search bar and 'No data' message, a 'Teams' section with 'Subordinates' and 'My Peers' tabs, and a 'Documents & Links' section with 'Documents' and 'Links' tabs. On the right, a 'Leave' summary shows 18.75 Annual Leave Days, with 'Upcoming' and 'Pending' leave periods and their respective approvers.



Tip

If the employee has not uploaded a banner, the company's custom background image will display in the top left corner on the employee's dashboard.

d. MFA

MFA is a security system that requires more than one method of authentication from independent categories of credentials to verify an identity. Besides providing an e-mail address and password, MFA will provide a second method of authentication when logging onto the system.

If the company has not enforced MFA on company level, the employee has the option to set-up MFA using Google Authenticator with e-mail as a fall back.

Google Authenticator is a free MFA application that enables the employee to use a time sensitive code to verify their identity.

To use Google Authenticator, the employee needs to have a smartphone and must have installed the **Google Authenticator app** from the smartphones' app store.

Once the barcode has been scanned on the Google Authenticator app and the pin has been captured, the set-up will be complete. Going forward, the employee will have to provide their login details as well as a pin number when logging onto the ESS portal.

Settings

Region Password Banner MFA

MFA

Multi-factor authentication (MFA) setup

Your current protection level

Multi-factor authentication (MFA) is a security system that requires more than one method of authentication from independent categories of credentials to verify your identity. We have implemented several methods to accomplish this to keep you safe. Please enter all the information below to enable this. Depending on your organizations policies this may be mandatory.

No Protection



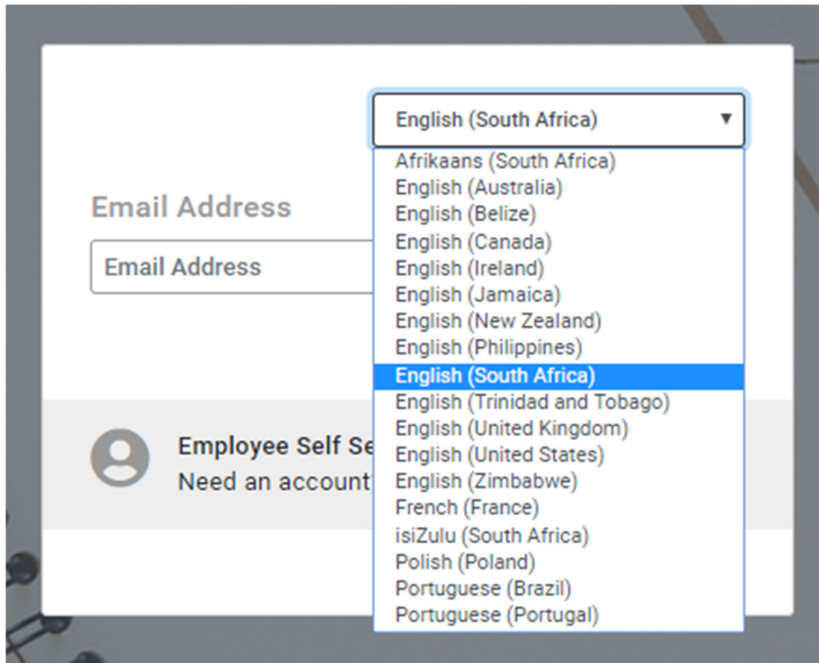
Locked Account

Once set-up, should the employee enter three incorrect One Time Pins (OTPs) obtained from Google Authenticator, the OTP will be e-mailed to the e-mail address confirmed during the set-up. If five incorrect attempts in total are made, the account will be locked. The account will have to be activated by the Company Level User.

v. ESS Features

a. Multi-Language Delivery

Employees can browse the portal in English, Afrikaans, French, IsiZulu, Polish and Portuguese. Select a language on the login page.



b. Switch to Existing Portal

Should an employee need to access a screen not yet available on the ESS portal, the option to navigate to the payroll portal will be available.




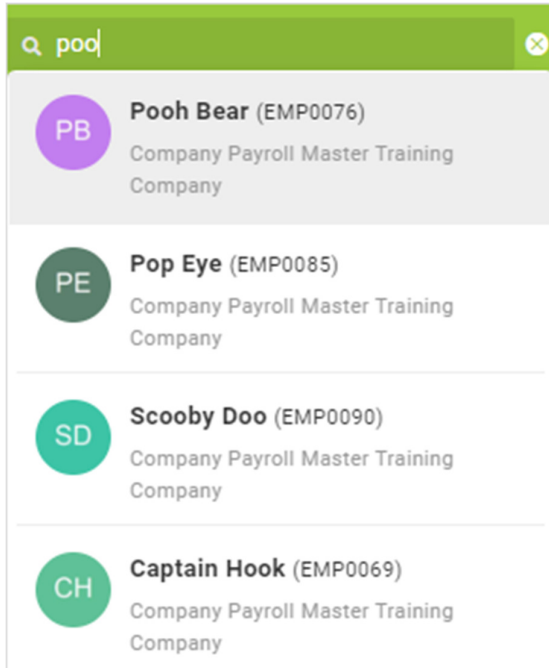
Coming Soon

We are hard at work to give you all the functionality you are used to and more. In the meantime we have created a shortcut to take you directly to the page you are looking for in the classic version.

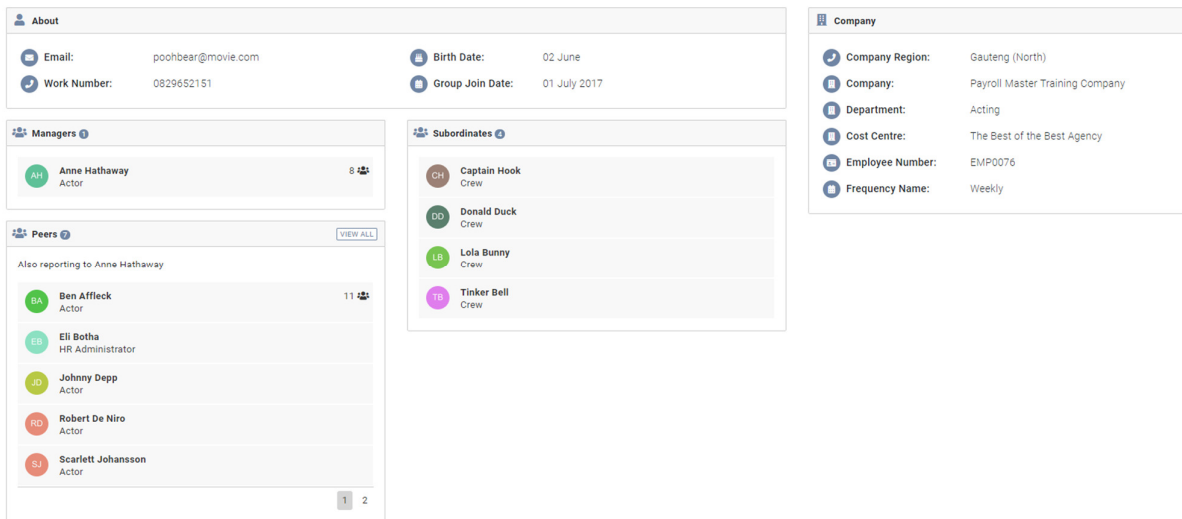
[Take Me Directly There](#)

c. Employee Directory

By default, the employee can search for any employee's public profile within a group of companies. To search the Employee Directory, select  on the navigation bar.



Upon selecting the employee, the public profile of the employee selected, will display.



Tip

By default, all fields on the public profile will display. A field can be deactivated on company level.

vi. Basic Workflow Paths to submit Leave Applications

When approving leave applications, the system offers a default workflow path from the employee to the directly reports to person.



Example

AI Pacino (EMP0043) decides to apply for one day's annual leave. He logs onto ESS and processes the leave application by selecting Apply from the Leave Widget.

Leave OFF SICK APPLY

15.75
Annual Leave Days

AI completes the leave application and selects **Submit**.

Leave Application

Apply | View History

Leave Type *
Annual

Start Date: 2019/09/23 | End Date: 2019/09/23

day/s: 1

Projected Leave Balance: 15.75 days

Comments:

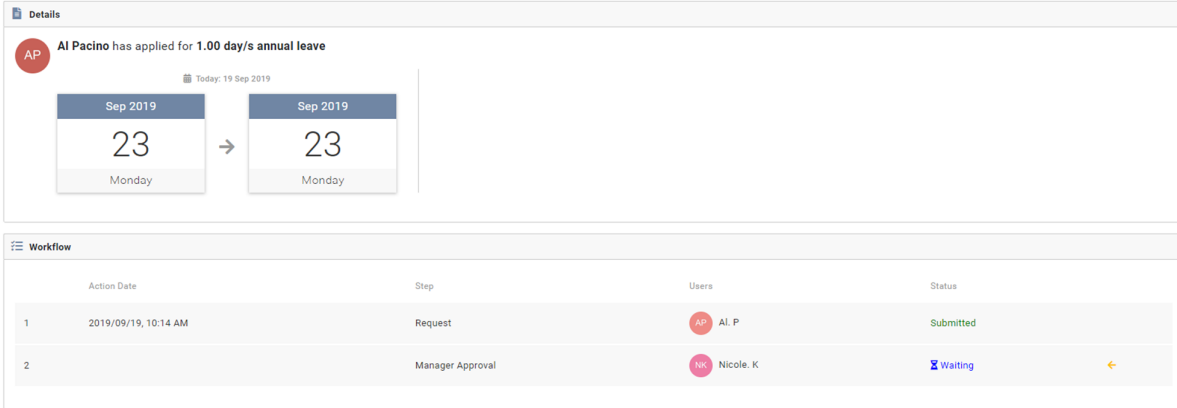
Reference:

Attachment: Select file or Drop file here

Next Approver: Nicole. K Submit

He can view the details of his leave application. He notices that Nicole Kidman is the **Next Approver**.

Leave Application
Leave Application / Detail



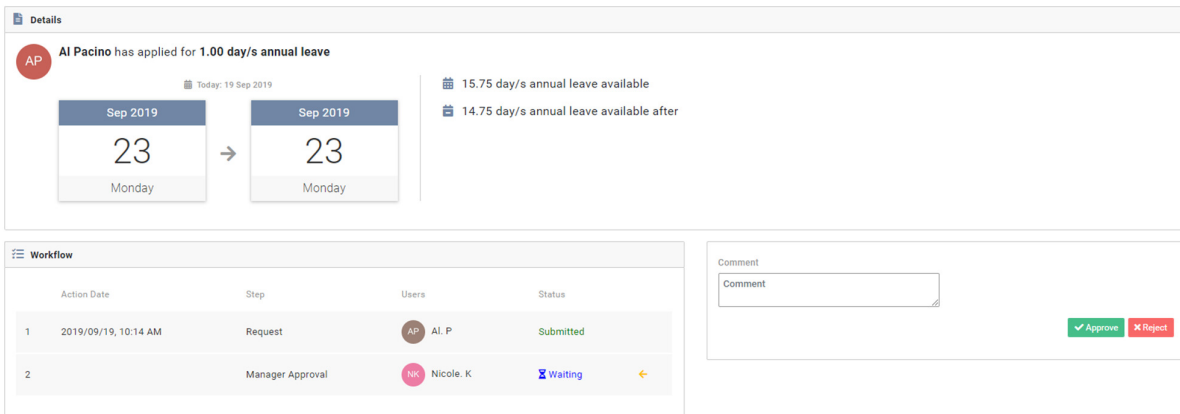
| Action Date | Step | Users | Status |
|----------------------|------------------|----------|-----------|
| 2019/09/19, 10:14 AM | Request | AI P | Submitted |
| | Manager Approval | Nicole K | Waiting |

Nicole receives an e-mail notifying her that there is a leave application that needs to be actioned in her Inbox.

Nicole accesses her ESS profile and views the leave transaction from her Inbox Widget.



Nicole approves the leave request.



| Action Date | Step | Users | Status |
|----------------------|------------------|----------|-----------|
| 2019/09/19, 10:14 AM | Request | AI P | Submitted |
| | Manager Approval | Nicole K | Waiting |



My Team's Calendar

'My Team's Calendar' is also visible on the screen on which a Leave Application is approved. This calendar will display approved leave applications of the subordinates and the manager of the approver.

| Mon | Tue | Wed | Thu | Fri | Sat | Sun |
|------------------|--------------------|-----|-----|---------------------|-----|-----|
| 25 | 27 | 28 | 29 | 30 Nicole Kidman | 31 | 01 |
| 02 | 03 | 04 | 05 | 06 | 07 | 08 |
| 09 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 AI Piccolo | 24 Heritage Day | 25 | 26 | 27 | 28 | 29 |
| 30 | 01 | 02 | 03 | 04 | 05 | 06 |

Now that Nicole has approved the leave request, the workflow item has been removed from this Inbox.

AI has received an e-mail notification that his leave application has been approved. He accesses his ESS profile. On his Leave Widget the leave approved will reflect as Upcoming. Ben's leave balance has been adjusted automatically.

Leave OFF SICK APPLY

14.75
Annual Leave Days

Upcoming

23 Sep 2019 - 23 Sep 2019
Annual Leave
 CANCEL

2. Accessing Manager Self Service

Employee Self Service (ESS) functionality allows the employee to log in as a user and access screens that are relevant to the employee. Manager Self Service (MSS) adds to this functionality by permitting the manager access to selected information of staff reporting to them.

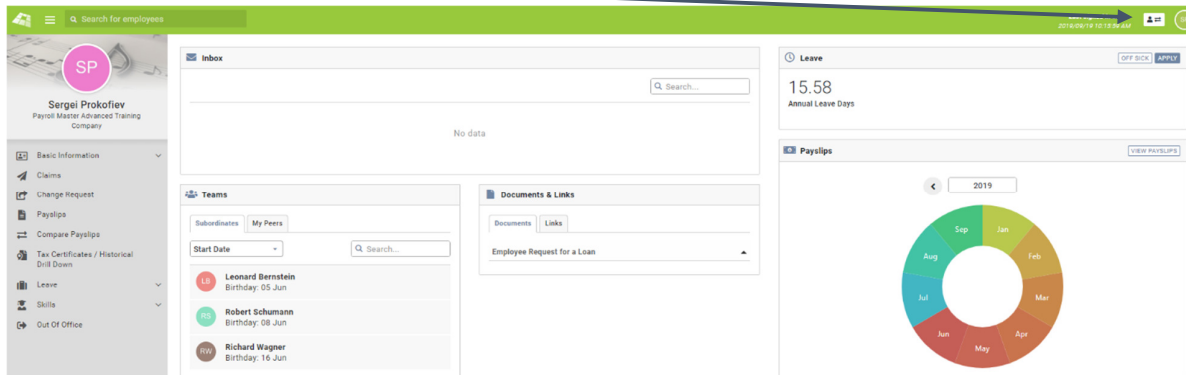


Example

Richard Wagner (EMP0551) wants to know what his annual leave balance is before planning his next vacation. He currently doesn't have access to a laptop or smartphone and decides to ask his manager, Sergei Prokofiev (EMP0557) to assist.

Sergei logs onto his ESS Profile to access Manager Self Service.

He selects **Team Access**  to access Richard's profile.



The screenshot displays the Manager Self Service interface. On the left, a navigation menu lists various options, with 'Team Access' highlighted. The main content area shows the 'Teams' section, which lists subordinates: Leonard Bernstein (Birthday: 05 Jun), Robert Schumann (Birthday: 08 Jun), and Richard Wagner (Birthday: 16 Jun). The 'Leave' section shows an annual leave balance of 15.58 days. The 'Payslips' section displays a donut chart for the year 2019, with months from Jan to Sep visible. A dark blue banner at the top of the screenshot contains the text 'He selects Team Access' followed by a 'Team Access' icon and 'to access Richard's profile.'

A dropdown list of employees reporting to Sergei as linked on the Employee Position Screen, displays. Sergei selects Richard Wagner's Public Profile.

Team Access [X]

Search...

- LB** Leonard Bernstein (EMP0548)
Composer
- RW** Richard Wagner (EMP0551)
Composer
- RS** Robert Schumann (EMP0554)
Composer

Sergei selects Richard's profile.

Sergei can now access the screens on Richard's public profile as per the permissions specified in the MSS Security Role.

Search for employees

Richard Wagner
Payroll Master Advanced Training Company

About

- Email: richardw@music.com
- Work Number: 021 888 9999
- Birth Date: 16 June
- Group Join Date: 01 September 2017

Company

- Company Region: Western Cape
- Company: Payroll Master Advanced Training Company
- Department: Music Genre
- Cost Centre: Classical
- Employee Number: EMP0551
- Frequency Name: Monthly - Recording Studio

Managers

- Sergei Prokofiev
Music Director

Peers

Also reporting to Sergei Prokofiev

- Leonard Bernstein
Composer
- Robert Schumann
Composer

Sergei proceeds to Richard's Leave Balances Screen to obtain the annual leave balance.

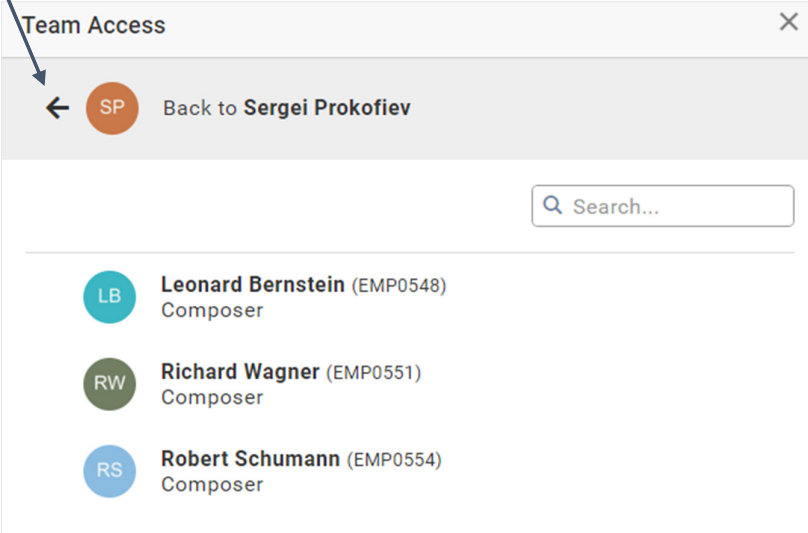
Navigation: Employee Menu>Leave Administration>Leave Balances

Sergei notifies Richard that he has an annual leave balance of 7.50.

Leave Balances September - 2019

| Leave Description | Accrual | Leave Balance | Min. Balance |
|-------------------|---------|---------------|--------------|
| Annual | 1.25 | 7.50 | 0.00 |

After selecting **Team Access** , Sergei returns to his profile by selecting the **Back Arrow**.



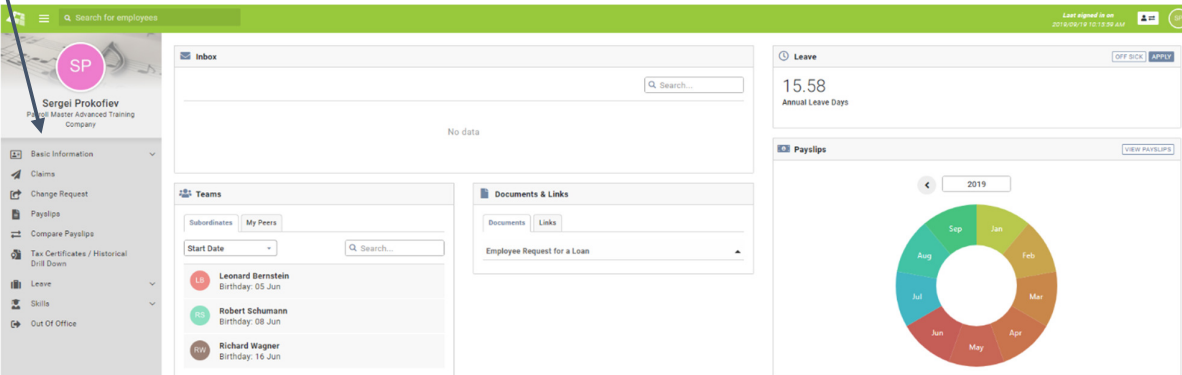
Team Access [Close]

← **SP** Back to **Sergei Prokofiev**

Search...

- LB** **Leonard Bernstein** (EMP0548)
Composer
- RW** **Richard Wagner** (EMP0551)
Composer
- RS** **Robert Schumann** (EMP0554)
Composer

Sergei can now access the screens on his own profile as per the permissions specified in the ESS Security Role.



Search for employees

SP **Sergei Prokofiev**
P3 Master Advanced Training Company

Basic Information
Claims
Change Request
Payslips
Compare Payslips
Tax Certificates / Historical Drill Down
Leave
Skills
Out Of Office

Inbox [Search...]
No data

Teams
Subordinates | My Peers
Start Date [Dropdown] [Search...]
Leonard Bernstein (LB) Birthday: 05 Jun
Robert Schumann (RS) Birthday: 08 Jun
Richard Wagner (RW) Birthday: 16 Jun

Documents & Links
Documents | Links
Employee Request for a Loan

Leave [OFF BACK] [APPLY]
15.58
Annual Leave Days

Payslips [VIEW PAYSIPS]
2019
Circular chart showing months: Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep.

Last signed in on: 2016/06/16 10:18:02 AM