# Contents

## 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.

### 1.1. ESS Registration

The employee can register for ESS using the same e-mail address as was captured 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 Login Page



Click on **ESS Registration.**

## The ESS Registration Screen



Select the tick box: **I'm not a robot.**

## The reCaptcha Exercise



Complete the exercise and click on **Verify.**
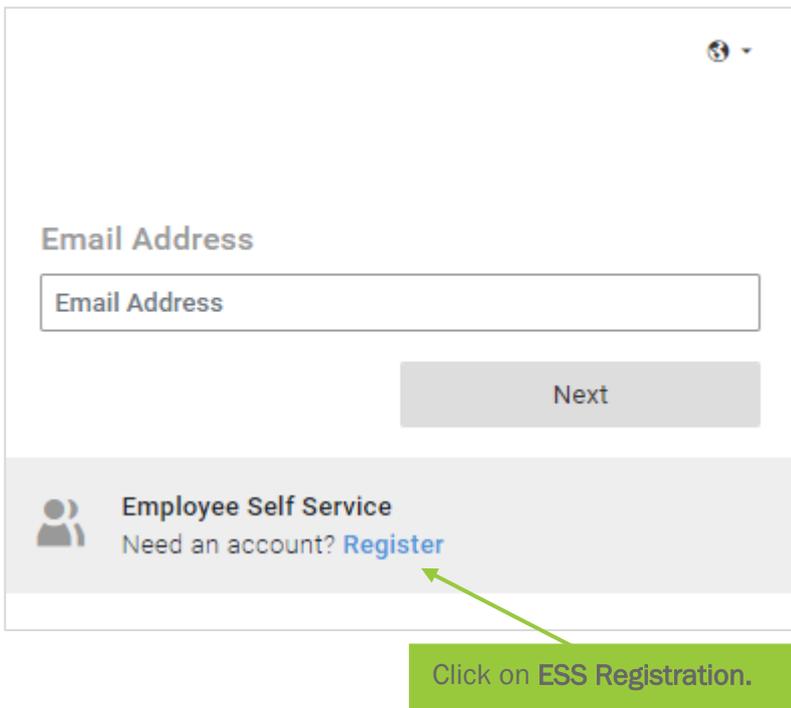
## The ESS Registration Screen

← 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.
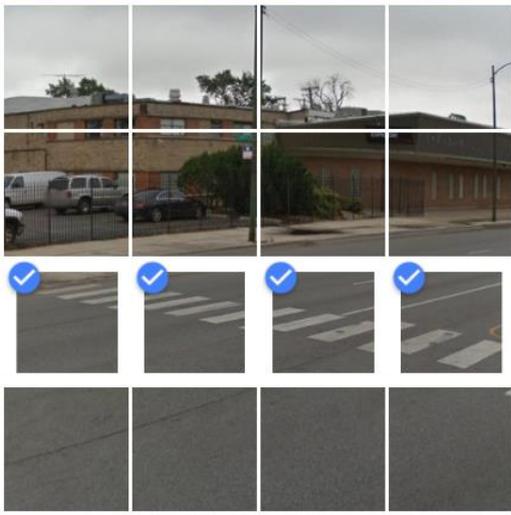
✓ I'm not a robot

reCAPTCHA
Privacy - Terms

Email Address

tomcess@mailinator.com

Register

With the reCaptcha exercise successfully completed, the employee can capture their e-mail address and click on **Register.** An e-mail notification will be sent to the employee to complete the registration process.

## The Activation E-mail

Hi Tom,

You registered for a PaySpace self service profile.You are just one click away. To get started, click the button below to activate your profile.

**ACTIVATE PROFILE**

*** This is an automated message, please do not reply to it. ***

The e-mail will prompt the employee to **activate the profile.**

The ESS Registration Screen

**Employee Self Service Registration**

New Password

``············``

Confirm Password

``············``

Register

The employee will be directed to the login screen, where a new password can be set-up.  Click on **Register.**

Confirmation of Registration Screen

**Employee Self Service Registration**

You have been registered successfully. Please click on the login button and enter your credentials.

Close

The employee has been successfully registered and can now proceed to log onto ESS via the login page.

## 1.2.    Login Options

To log onto the ESS portal, the employee can access the system via the secure login page:

Click on the Language Icon to choose a language to browse the portal in.

The Login Screen

← tomcess@mailinator.com

Password

••••••••••••

Login            Reset Password

Privacy Policy | Terms and Conditions of Use

Afrikaans (South Africa)
English (Australia)
English (Belize)
English (Canada)
English (Ireland)
English (Jamaica)
English (New Zealand)
English (Philippines)
English (South Africa)
English (Trinidad and Tobago)
English (United Kingdom)
English (United States)
English (Zimbabwe)
French (France)
isiZulu (South Africa)
Polish (Poland)
Portuguese (Brazil)
Portuguese (Portugal)

Complete the e-mail address and password and click on the **Login.**

## 1.3.    Orientation of the ESS Dashboard

Once the employee has logged onto ESS, they will be directed to their ESS Dashboard.  The ESS Dashboard consists of a Title Bar, Location Menu, Left Menu and Widgets.

The ESS Dashboard
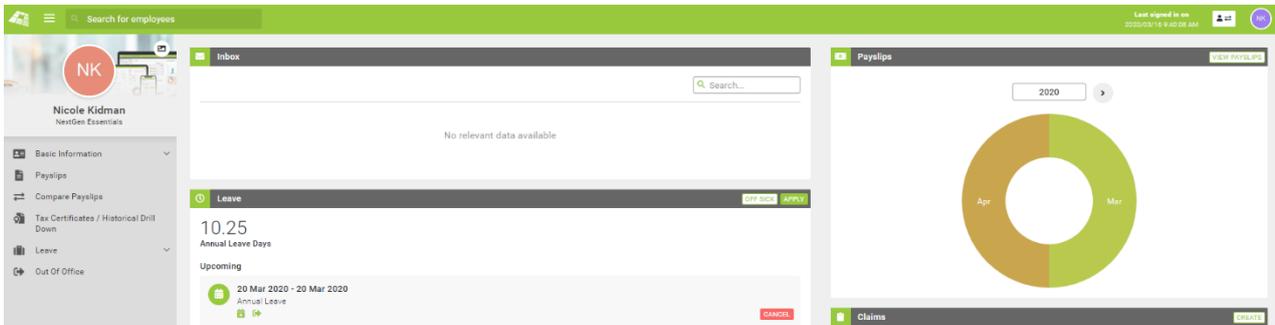


### 1.3.1.  The Title Bar

The ESS Dashboard: Title Bar
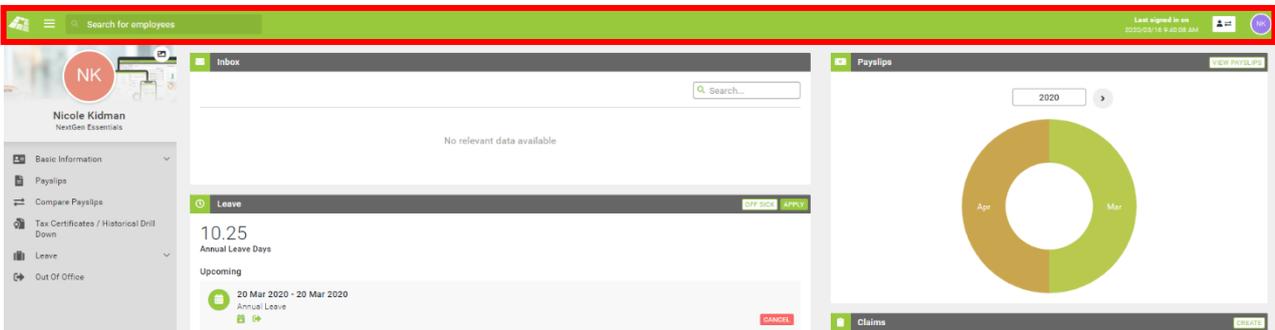


## *Title Bar Fields*

| Field | Explanation |
| --- | --- |
|  | Select the logo to navigate back to the ESS Dashboard. |
|  | Select the Hamburger Menu to switch between an expanded or collapsed Left Menu.  The Left Menu will still be visible when hovering over it. |

## *Title Bar Fields*

| | |
|---|---|
| **Search for employees** | Select this option to search the Employee Directory. By default, this will include all active employees within a group of companies. An employee can be searched for by name, surname or employee code. The employee's Public Profile will be accessed. |
| **Last signed in on 2020/02/24 9:38:20 AM** | The date and time that you have last accessed the system displays. |
| | For managers with employees reporting to them, **Team Access** 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. |

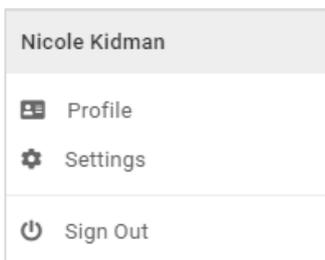Various options are available when selecting this option:

**Profile:** The employee can use this shortcut to access their Basic Profile Screen.

**Settings:**

- **Region:** The employee can select the language and format which will affect the language and date format on the portal. The time zone selected, will be used when audit trail activities are recorded.
- **Password:** The employee can change their password.
- **Banner:** The banner uploaded here, will be visible on the employee's Location Menu and Public Profile. If the employee has not uploaded a banner, the standard or Company Background Image will display.
- **MFA:** As an optional, the employee can activate Multi-Factor Authentication using a smartphone and the Google Authenticator app.
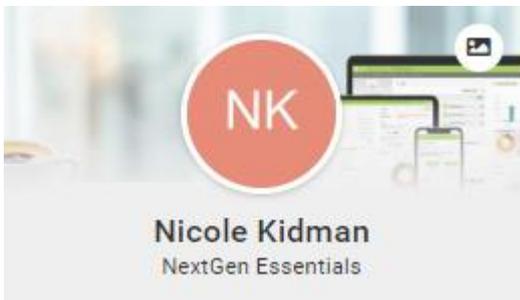
**Sign Out:** Select this option to exit the system.

Nicole Kidman

- Profile
- Settings
- Sign Out

## 1.3.2. The Location Menu

**The ESS Dashboard: Location Menu**
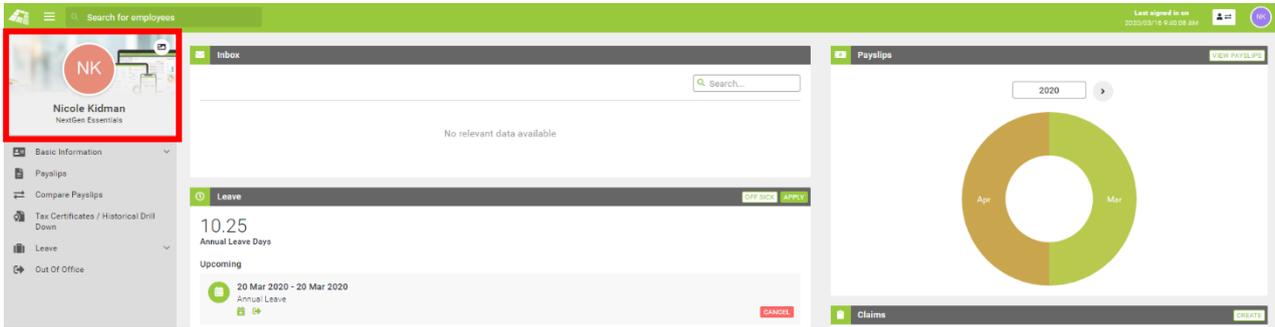


**The Location Menu**



## Location Menu Fields
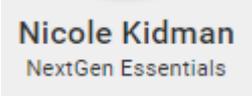
| Field | Explanation |
| --- | --- |
| Nicole Kidman<br>NextGen Essentials | The employee and company name will display. |
| NK | If a photo was uploaded on the employee's Basic Profile Screen, it will display here. |
| 🖼 | The employee can click on the Change Banner Icon to change a banner. The banner will display on the Location Menu as well as the employee's Public Profile. |

### 1.3.3.  The Left Menu

**The Left Menu:**
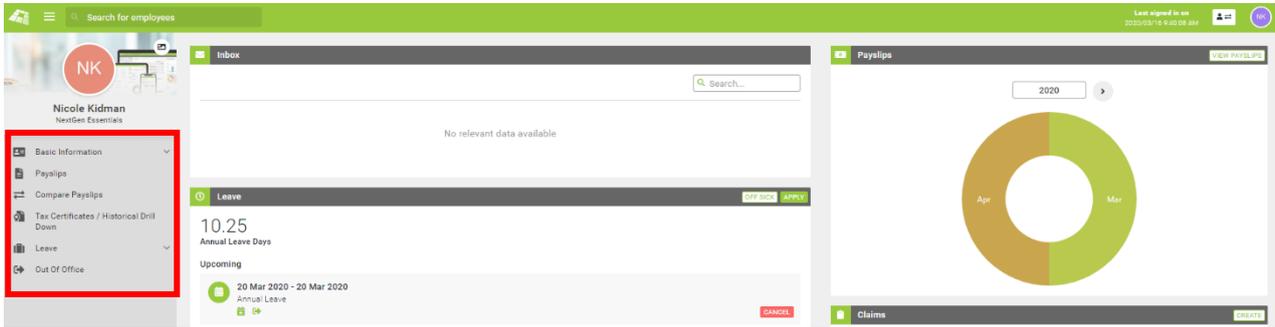


By default, the Left Menu for ESS purposes, will include the following screens:

**The Default Left Menu**



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**Tip**

The default screens and permissions can be changed on Company Level.

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### 1.3.4. The Widgets

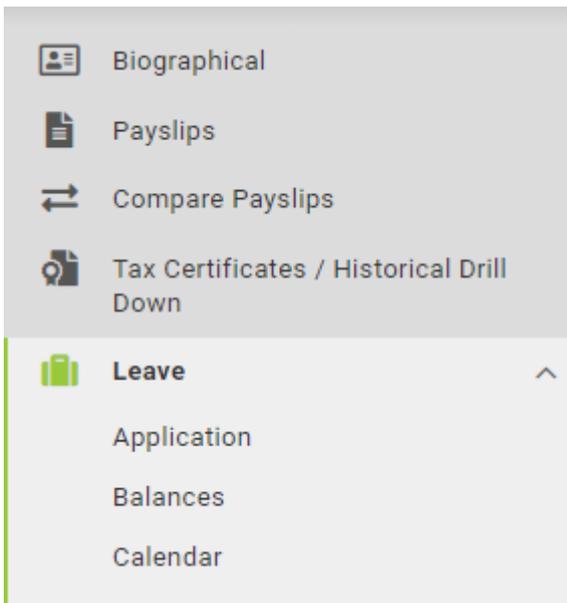Widgets have been designed for Leave, Payslip, Claims, Inbox, Teams as well as Documents & Links.

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**Tip**

By default, six widgets will be visible.  A widget can be deactivated on Company Level.

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The Widgets
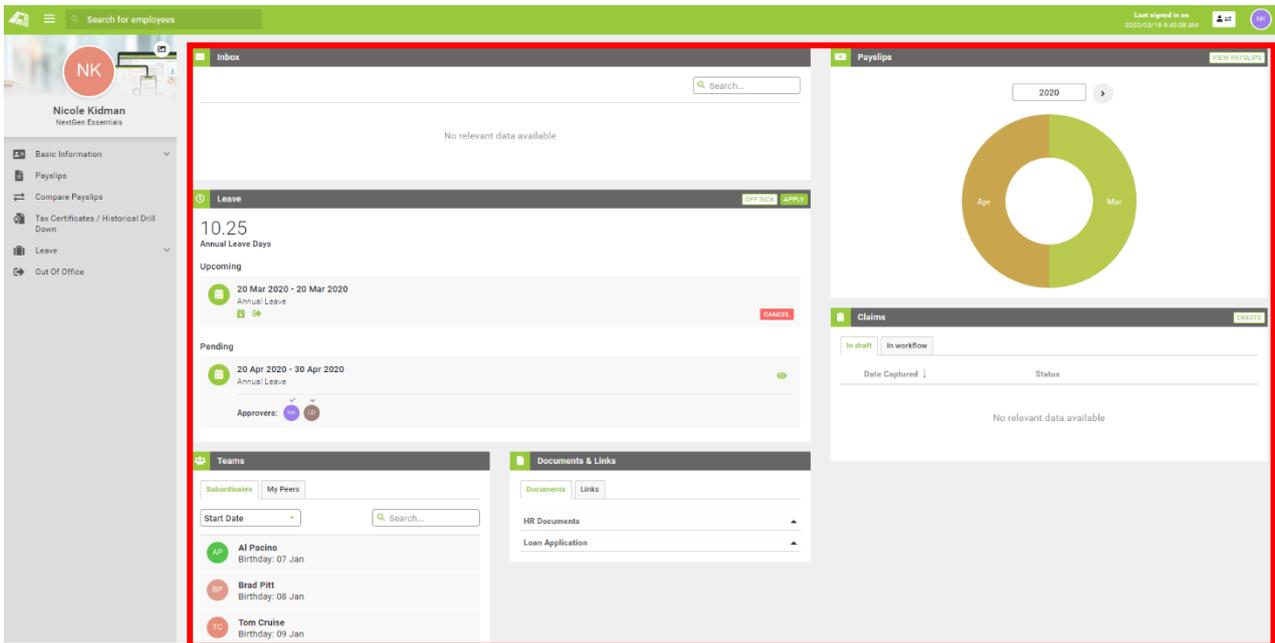


### 1.3.4.1.  The Inbox Widget

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

The Inbox Widget

## 1.3.4.2. The 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.**

**The Leave Widget**



*Leave Widget Fields*

| 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. |
| **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. |

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

| | Tip |
|---|---|
| | When approving leave applications, the system offers a default workflow path from the employee to the directly reports to person.  This can be changed on Company Level. |

### 1.3.4.3.   The Teams Widget

The Teams Widget displays an employee's subordinates and peers.  **Subordinates** refer to all employees reporting to the manager who is logged onto ESS, and **My Peers** refer to employees who report to the same manager as the employee who is logged onto ESS.  The column can be sorted by the employee's **Start Date** or **Last Name**.

**The Teams Widget**



The employee can navigate to another employee's Public Profile across the ESS portal, by selecting the Photo Icon of the employee.

## The Employee's Public Profile



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Tips



- By default, all fields on the employee's Public Profile will display. A field can be deactivated on Company Level. If the employee has not uploaded a banner, the standard or Company Background Image will display.
- The employee's Public Profile can also be accessed by searching for an employee via the Employee Directory from the Title Bar.



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### 1.3.4.4.  The Documents and Links Widget

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

### The Documents & Links Widget



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## 1.3.4.5. The 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.

The Payslips Widget
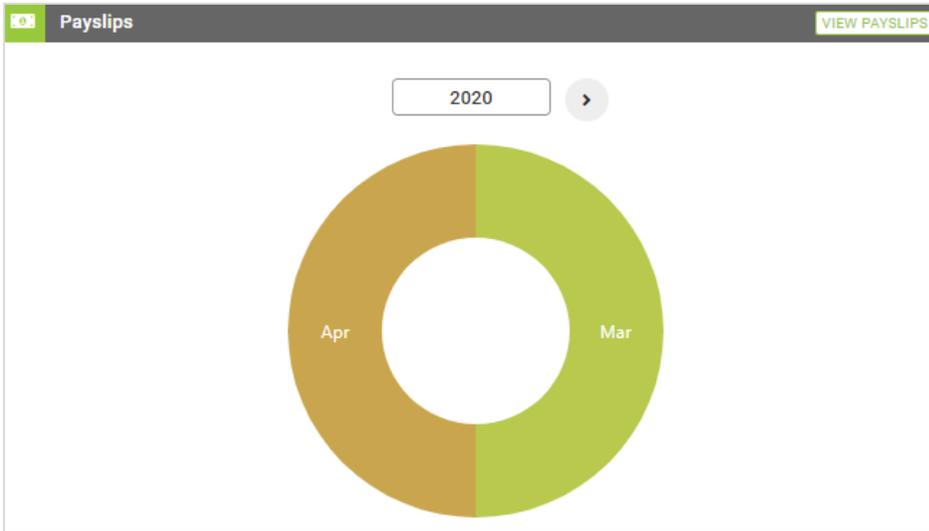


Upon selecting a month, a short summary will display:



When viewing the payslip, more details will display.  The employee can also **Email** and **Download** the payslip from this screen:

## 1.3.4.6. The 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.

**The Claims Widget**

## 1.4.    The Default ESS Leave Workflow Path

### 1.4.1. Overview

When approving leave applications, the system offers a default workflow path from the employee to the directly reports to person.  The workflow path when submitting a leave application, will be as follows:

```
                    ┌─────────────────────┐
                    │     Employee        │
                    │     submits         │
                    │  Leave Application  │
                    └─────────────────────┘
                      ↙                 ↘

┌─────────────────────┐          ┌─────────────────────┐
│     Manager         │          │     Manager         │
│     approves        │          │     rejects         │
│  Leave Application  │          │  Leave Application  │
└─────────────────────┘          └─────────────────────┘
         ↓                                 ↓
┌─────────────────────┐          ┌─────────────────────────┐
│  Leave Transaction  │          │ Employee receives an e- │
│ commits to Employee's│         │ mail notification for the│
│   Leave Records     │          │  rejected transaction.  │
└─────────────────────┘          │                         │
                                 │ Employee submits a new  │
                                 │   Leave Application.    │
                                 └─────────────────────────┘
```
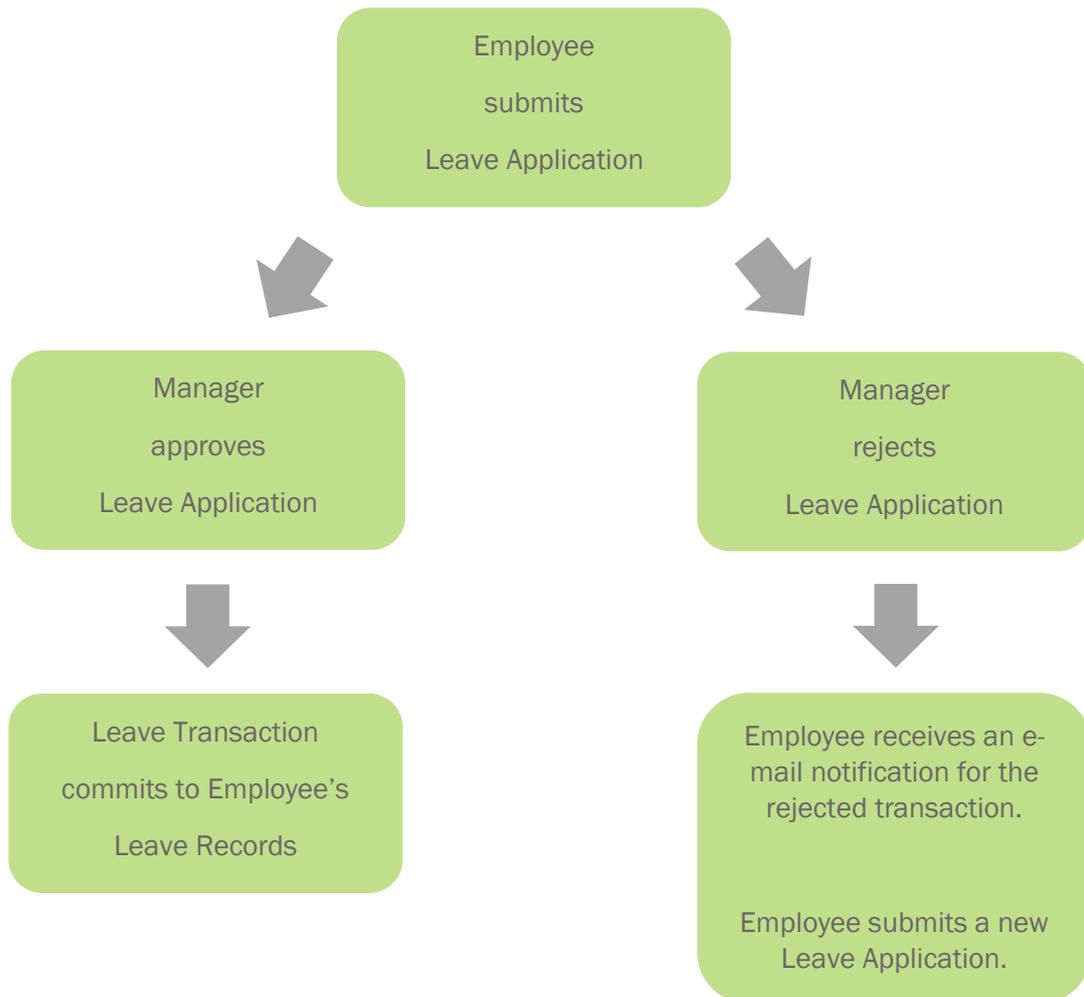
**Tip**

A leave application cannot be cancelled while in workflow.  Only after it has been approved or rejected, can the employee cancel the leave application.

## 1.4.2. Example of Submitting a Leave Application
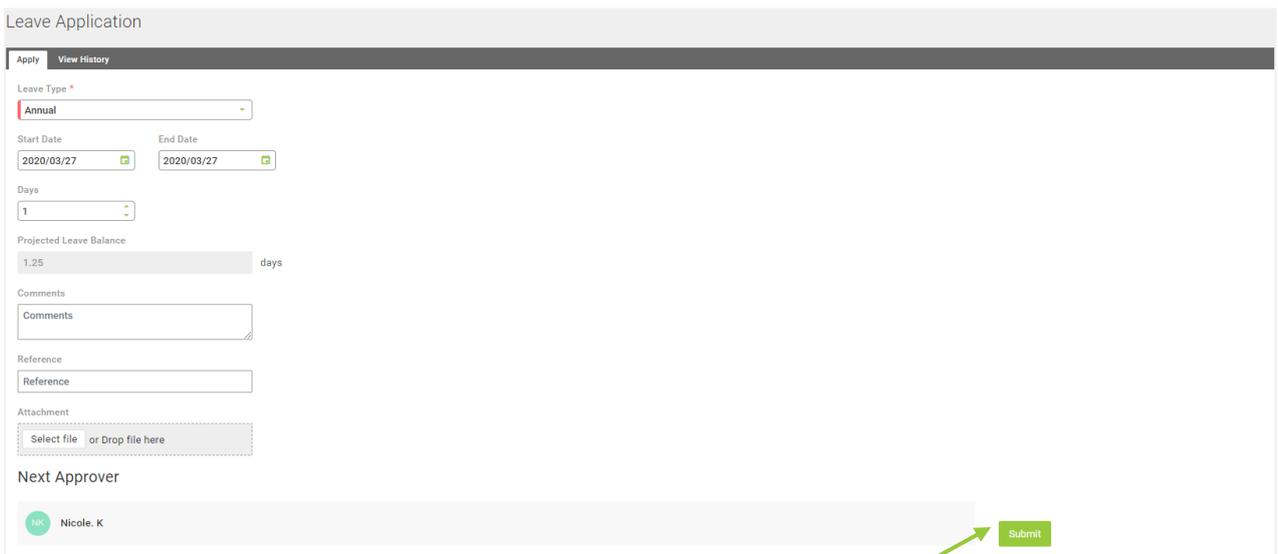
The employee would like to apply for annual leave.  The employee logs on their ESS portal and follows these guidelines from the ESS Dashboard:
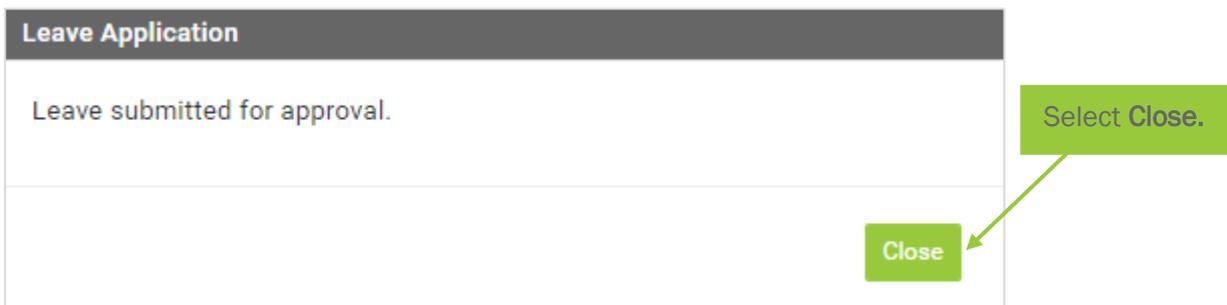
**The Employee's Leave Widget**



From the Leave Widget, select **Apply.**

**The Leave Application Screen**



Complete and select **Submit.**

**Confirmation of Leave Application Submitted.**



Select **Close.**

## The Details Screen

| Details |
| --- |

**Brad Pitt** has applied for **1.00 day/s annual leave**

📅 Today: 16 Mar 2020

| Mar 2020 | | Mar 2020 |
| --- | --- | --- |
| 27 | → | 27 |
| Friday | | Friday |

The details of the leave application will display.

## The Workflow Screen

| | Workflow | | | |
| --- | --- | --- | --- | --- |
| | Action Date | Step | Users | Status |
| 1 | 2020/03/16, 12:31 PM | Request | BP Brad. P | Submitted |
| 2 | | Manager Approval | NK Nicole. K | ⌛ Waiting ← |

The workflow path of the leave application will display.

## The Employee's Leave Widget

| 🕐 Leave | OFF SICK APPLY |
| --- | --- |

**1.25**
Annual Leave Days

**Pending**

📅 27 Mar 2020 - 27 Mar 2020
Annual Leave                                                    👁

✓ ▼
Approvers: BP NK

The pending leave application will display on the Leave Widget.

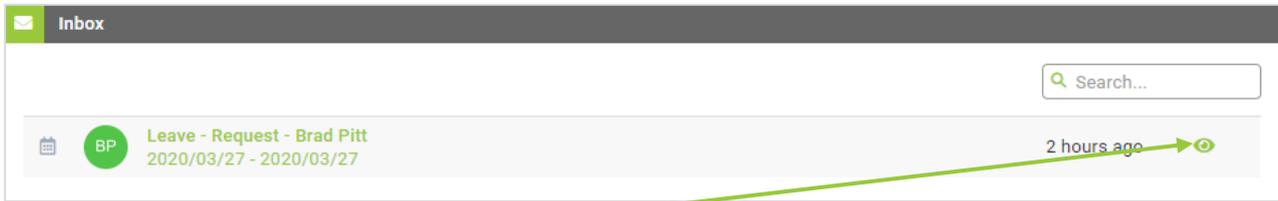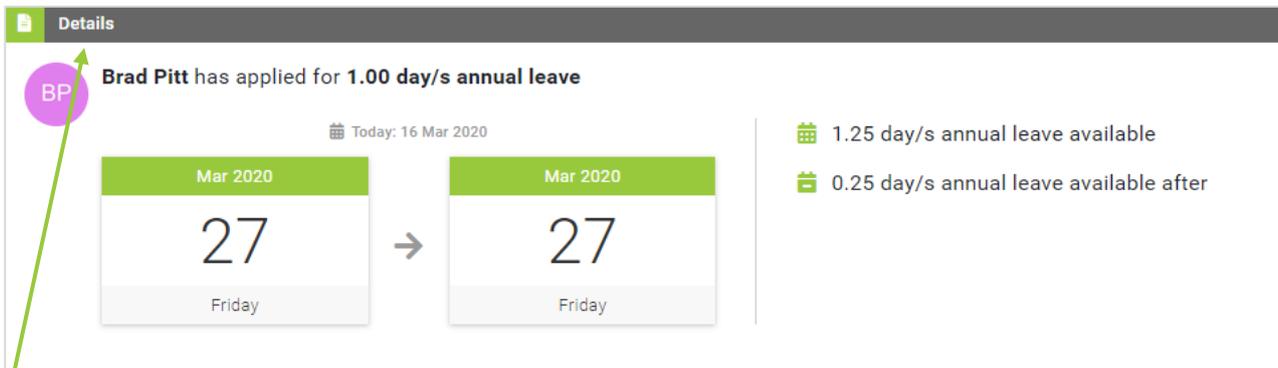Upon submitting the leave application, both the employee and manager receives an e-mail confirmation. The manager logs onto their ESS Portal and follows these guidelines:
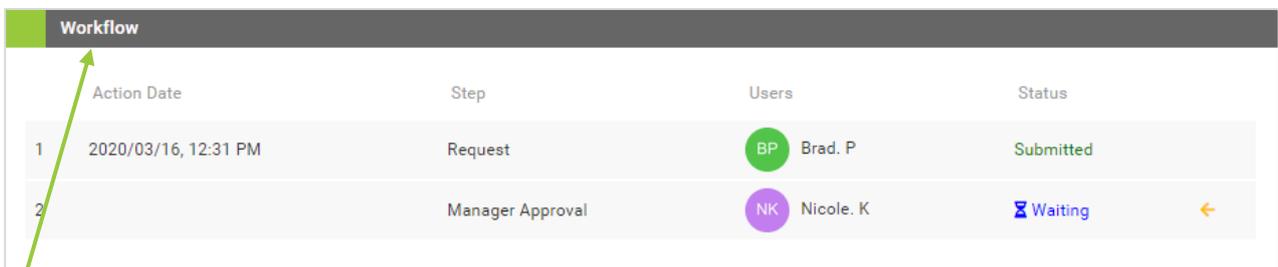
### The Manager's Inbox Widget

✉ **Inbox**

🔍 Search...

📅  BP  **Leave - Request - Brad Pitt**
2020/03/27 - 2020/03/27                                    2 hours ago   👁

From the Inbox Widget, select to view the leave application.

### The Details Screen

📄 **Details**

BP  **Brad Pitt** has applied for **1.00 day/s annual leave**

📅 Today: 16 Mar 2020

| Mar 2020 |   | Mar 2020 |
| --- | --- | --- |
| **27** | → | **27** |
| Friday |   | Friday |

📅 1.25 day/s annual leave available

📅 0.25 day/s annual leave available after

The details of the leave application will display.

### The Workflow Screen

**Workflow**

| | Action Date | Step | Users | Status |
| --- | --- | --- | --- | --- |
| 1 | 2020/03/16, 12:31 PM | Request | BP  Brad. P | Submitted |
| 2 | | Manager Approval | NK  Nicole. K | ⧗ Waiting  ← |

The workflow path of the leave application will display.
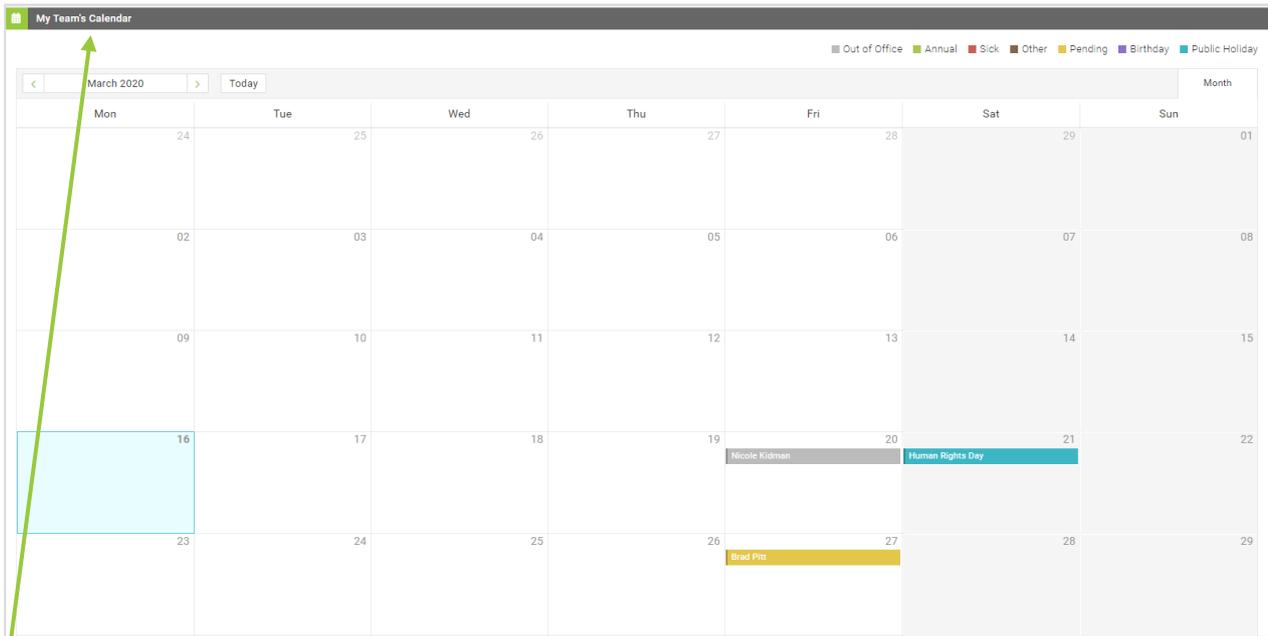
## My Team's Calendar



My Team's Calendar will display.

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### My Team's Calendar

This calendar will display approved leave applications of the subordinates and the manager of the approver.
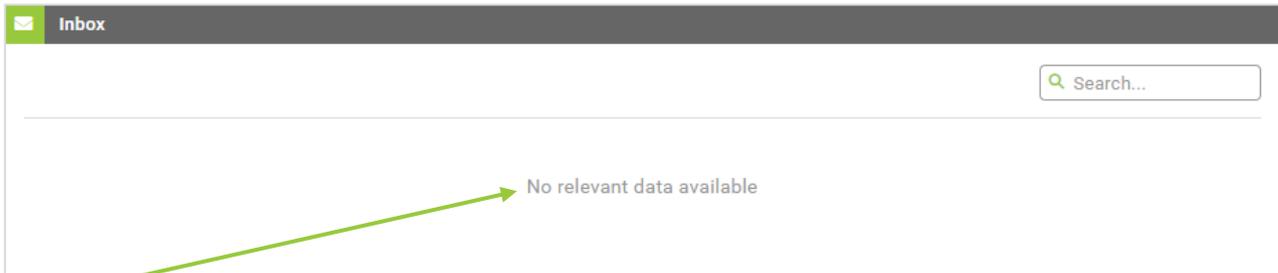
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## The Approve or Reject Screen



Select **Approve.**

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### Tip

The Comments Box needs to be completed to reject a leave application. Should a leave application be rejected, the employee will receive an e-mail notification. If relevant, the employee will have to submit a new leave application.

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## The Manager's Inbox Widget



Now that the leave application has been approved, it will be removed from the manager's Inbox.

Upon approving the leave application, both the employee and manager receive an e-mail confirmation. The employee logs onto their ESS Portal and view:

## The Employee's Leave Widget