SoftlineVIP

Employee Self Service (ESS)

Getting Started Guide

VIP PAYROLL

The leader in payroll & hr services

Contents

Introduction to ESS

The Employee Self Service (ESS) Application is a web based application that gives you access to information from your employee record in the payroll.

Depending on the modules that have been implemented by your company, you may have access to the following information:

- Viewing and editing of personal information such as
    - Personal details
    - Emergency Contact Details
    - Banking Details
    - Residential and Postal Addresses
- Viewing, editing and adding details of family members
- Leave information
    - Applying for leave
    - Viewing leave requests in workflow
    - Viewing leave balances
    - Viewing a graphical leave calendar
    - Viewing a report of leave transactions
- Payslip information
    - Viewing of current and historical payslips
    - Printing of payslips
    - Exporting payslips PDF
- IRP5 information
    - Viewing of current and historical IRP5s
    - Printing of IRP5s
    - Exporting IRP5s to PDF

Getting Started

The purpose of this quick reference guide is to provide you with basic tools and guidelines on how to start using the ESS Application for the first time, how to access information and how to submit requests using ESS.

This guide offers a step by step explanation of all aspects necessary for the successful use of the ESS Application.

This section describes the following processes:

- Prerequisites necessary to successfully use ESS
- ESS Account activation
- ESS Login process
- The ESS User Summary screen

Prerequisites

In order to use Employee Self Service (ESS), you will need the following:

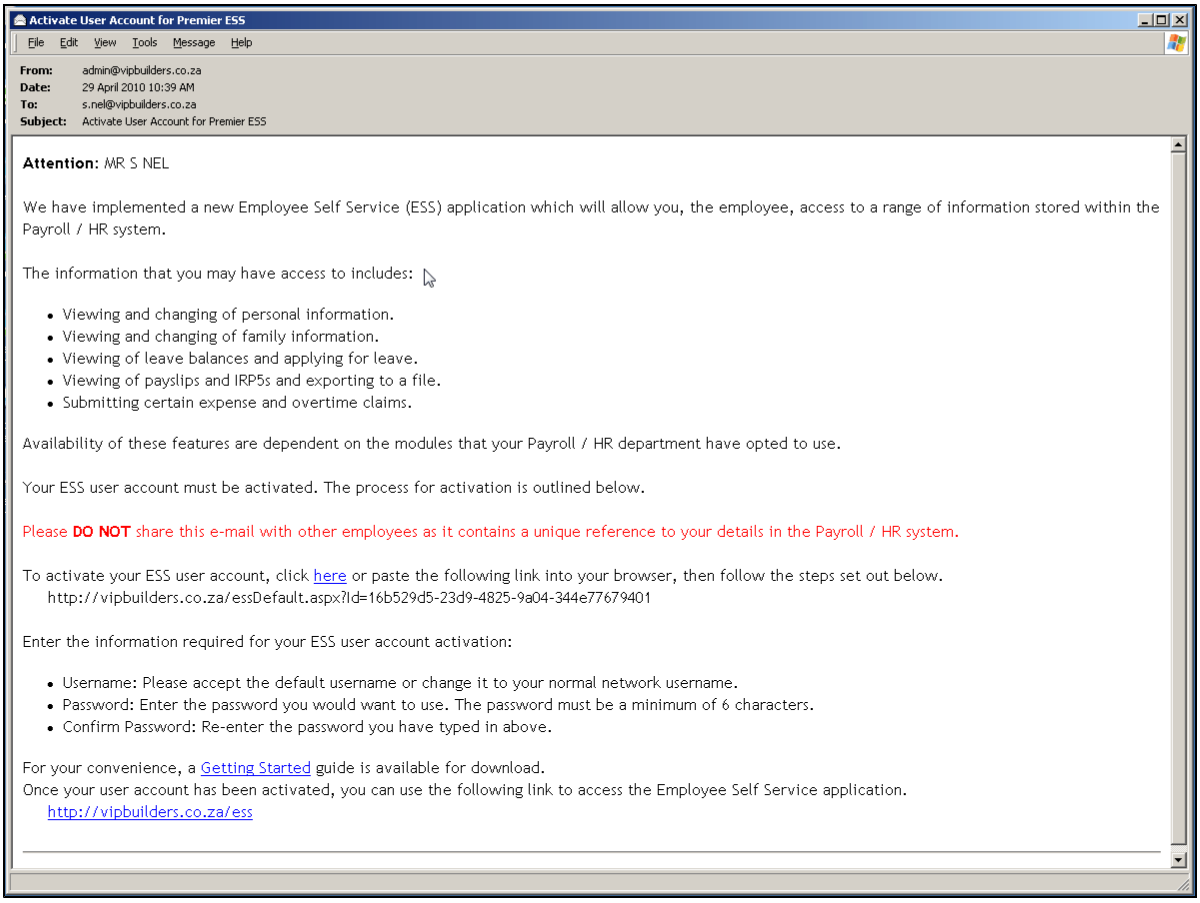
- Access to a PC with a recommended screen resolution of 1024 x 768 pixels.
- Access to the network on which the ESS application is hosted.
- A web browser e.g. Internet Explorer 7 or Mozilla Firefox 4.0 or higher
- An email account
  - You will receive an account activation email to activate your ESS user account
  - You will receive notifications of request submission and subsequent actions via email
- Adobe Reader 8.0 or higher
  - This is required in order to view pay slips and IRP5s

Account Activation

Before you can use the ESS application, you need to activate your ESS user account. As part of the rollout of the ESS Application, you will receive an activation e-mail similar to the one shown below.

Very Important: Do NOT forward this e-mail to anyone else, as it contains a unique link to your employee record in the payroll.

The e-mail has an activation link as well as details of the information that you will be required to enter to complete the activation process.



Activate User Account for Premier ESS

File Edit View Tools Message Help

From: admin@vipbuilders.co.za
Date: 29 April 2010 10:39 AM
To: s.nel@vipbuilders.co.za
Subject: Activate User Account for Premier ESS

Attention: MR S NEL

We have implemented a new Employee Self Service (ESS) application which will allow you, the employee, access to a range of information stored within the Payroll / HR system.

The information that you may have access to includes:

- Viewing and changing of personal information.
- Viewing and changing of family information.
- Viewing of leave balances and applying for leave.
- Viewing of payslips and IRP5s and exporting to a file.
- Submitting certain expense and overtime claims.

Availability of these features are dependent on the modules that your Payroll / HR department have opted to use.

Your ESS user account must be activated. The process for activation is outlined below.

Please **DO NOT** share this e-mail with other employees as it contains a unique reference to your details in the Payroll / HR system.

To activate your ESS user account, click here or paste the following link into your browser, then follow the steps set out below.
http://vipbuilders.co.za/essDefault.aspx?Id=16b529d5-23d9-4825-9a04-344e77679401

Enter the information required for your ESS user account activation:

- Username: Please accept the default username or change it to your normal network username.
- Password: Enter the password you would want to use. The password must be a minimum of 6 characters.
- Confirm Password: Re-enter the password you have typed in above.

For your convenience, a Getting Started guide is available for download.
Once your user account has been activated, you can use the following link to access the Employee Self Service application.
http://vipbuilders.co.za/ess

How to activate you ESS User Account

1. Click on the link contained in the e-mail.
2. This will open your default web browser, take you to the ESS web site and open the account activation window.
3. Depending on the option selected by your ESS administrator, the Username field may be have on of the following properties.

Username field has a default username and is editable

If the username field contains a default username and is editable, i.e. has a white background, then you can either accept the default username (make a note of this username) or change the username to one that you can easily remember.

Username field is blank and is editable

If the username field does not contain a username,enter your preferred username.

Username field has a default username and is not editable

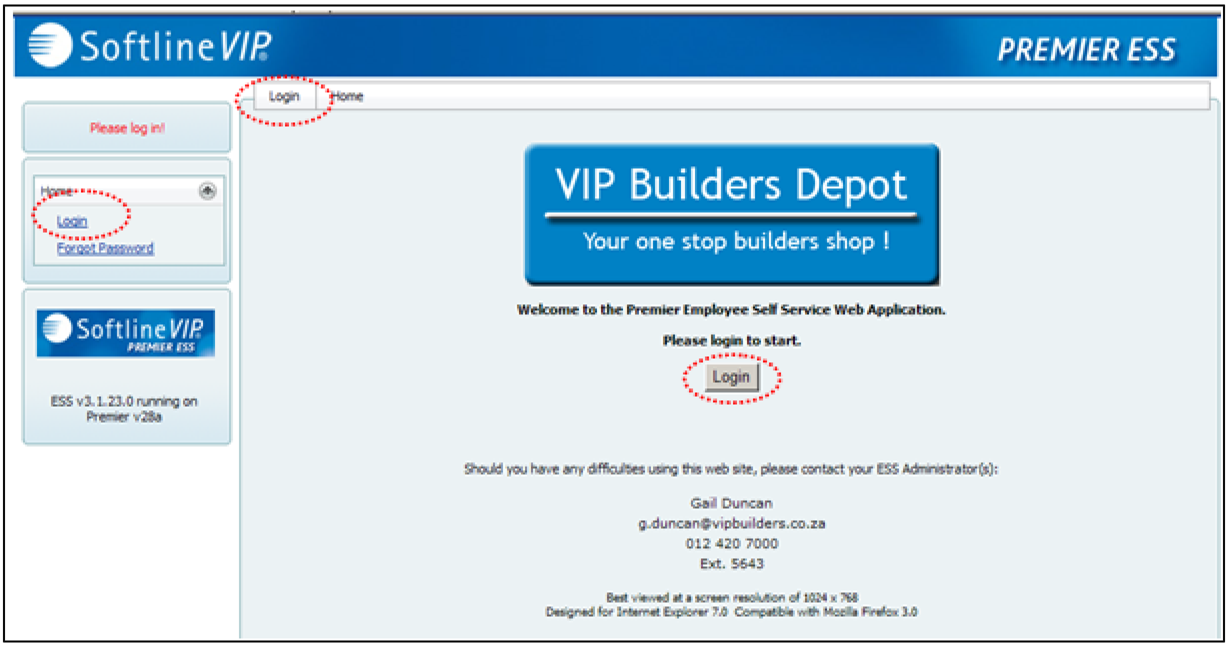
If the username field contains a default username and is not editable, i.e. has a grey background, then you cannot change the username. Make a note of the assigned username.

4. Enter your preferred password.
5. Confirm your password.
6. Confirm your email address is correct.
   NOTE: This is the email address that ESS will use for all relevant ESS Correspondence. Changing this email address will not update any other systems.
7. Click on the Activate Account button.

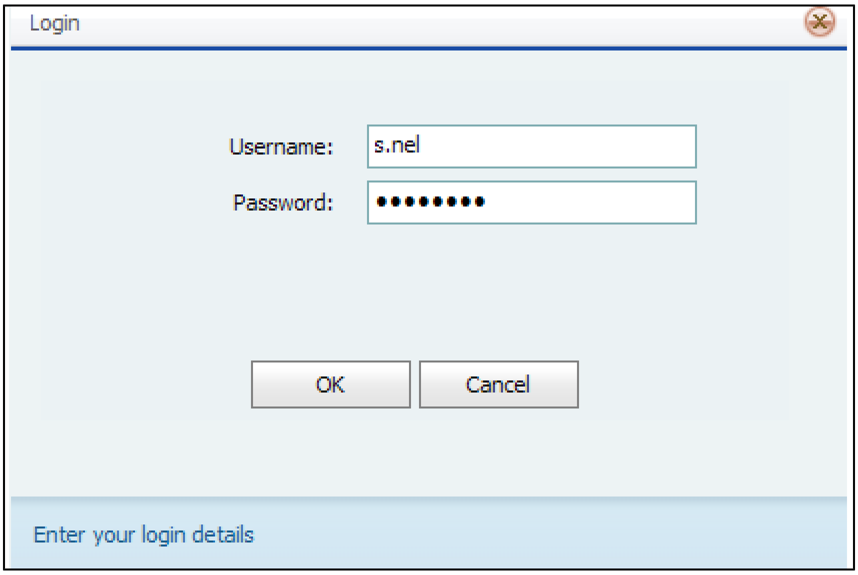
You have activated your ESS user account and can now use the Employee Self Service application.

Login

Once you have activated your ESS User Account, you can use the Login links on the welcome page to login to the ESS Application.



This will open the Login dialogue pop-up.



Enter your Username and Password and click on OK to login to the ESS application.

NOTE: If the incorrect password is entered five times, the user account will be locked and the ESS Administrator will need to unlock the account.

You will then be taken to the Summary Screen.

Summary Screen

When you have logged into the ESS application, you will be directed to the Employee Summary Screen, which consists of 3 main sections:

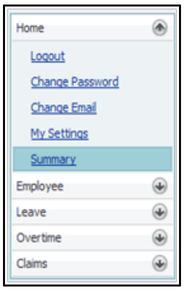
- Navigation bar
- Menu
- Content Area (Summary Section)

Navigation Options

You have the option of either using the Menu (on the left-hand side of the webpage) or the Navigation Bar (above the content area) to access the various features of ESS.

The available navigation options will depend on the ESS features which your payroll / HR department have activated.

Menu

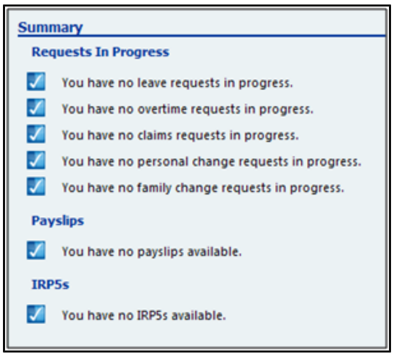


Navigation Bar

Summary Section

The Summary area consists of various sections:

- Requests in Progress
- Payslips
- IRP5s



The Requests in Progress section displays a summary of all your requests that are currently in progress (i.e. that have been submitted but have not been approved by your final approver yet).

The Payslips section displays a summary of all your payslips (current and archived) that are available to be viewed.

The IRP5s section displays a summary of all your IRP5s (current and archived) that are available to be viewed.

Included in the ESS Application is an electronic help file. This file provides detailed information about everything you need to know about using the application. This file may be accessed from the Summary Page: Click on Help, then click on User Help.

Personal Details

You can view your personal details as they are recorded in the payroll, by selecting the Personal Detail option under the Employee section of the menu or navigation bar.

This will display the Personal Details screen as shown on the next page. This screen is split into the following sections:

- Personal Details
- Emergency Contact Details
- Banking Details
- Reporting Address
- Residential Address (required by the Receiver of Revenue in RSA)
- Postal Address (required by the Receiver of Revenue in RSA)
- Other details

Ensure that all of the relevant information has been completed. Fields that have not been complete or require updating can be updated and then submitted to updating of the payroll.

Once you have completed the necessary fields that need updating, click on the Submit Request button to submit the changes to workflow for approval.

These types of requests are usually directed to your HR or Payroll department for approval and subsequent updating of your details to your payroll record.

Family Details

This feature allows for the following functionality:

- View details of family members that have been linked to your employee record
- Edit details of existing family member records
- Delete existing family member records
- Add new family members

The family member record allows for the following information to be captured:

- Relationship
- Medical Aid dependency
- Full Name
- Date of Birth
- ID Number
- Cell phone number
- Work phone number
- Home phone number
- Email address
- Address details
- Contact Priority
- Details of fund beneficiary status

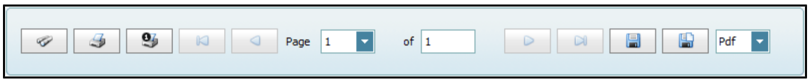
Payslips

This feature allows access to your current and history pay slips.

A list of available pay slips will be displayed. To view an individual payslip, click on the relevant Payslip Date link.

The selected payslip will be displayed on the screen.

There is a menu bar just above the payslip that allows for the following actions:



- Print current page
- Print all pages
- Export to PDF
- Export to PDF and open in a new window

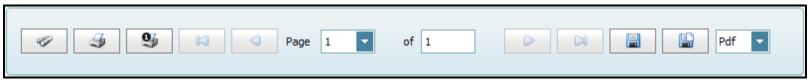
IRP5s

This feature allows access to your current and history IRP5 certificates (History IRP5s are only stored from the first tax year after the date that the ESS Application was implemented)

A list of available IRP5s will be displayed. To view an individual IRP5 click on the relevant Year link.

The selected IRP5 will be displayed on the screen.

There is a menu bar just above the IRP5 that allows for the following actions:



- Print current page
- Print all pages
- Export to PDF
- Export to PDF and open in a new window

Note:
IRP5s are the Income Tax certificates issued to employee in the Republic of South Africa. Tax certificates for other countries are not support in the ESS application at this time.

Leave

From the Leave options on the menu, the following options are available:

- Apply for Leave
- Leave In Progress
- Leave Balances
- Leave calendar
- Leave Report

Apply for Leave

To apply for leave, select the Apply for Leave option from the menu. This will open the Leave Request screen.

To complete the leave request, the following fields need to be completed:

- Leave Type
- From Date
- To Date
- Reason
- Comments (optional)

Additional fields may need to be completed for sick leave:

- Doctor's Name
- Practice Number
- Confirmation of Sick note (if required)

The system will automatically calculate the number of days requested based on the dates selected, and will exclude public holidays and other non-working days as defined on the payroll.

Should it be necessary, the Days Requested can be overwritten.

E.g. when taking a half day of leave, this can be changed to a 0.5

Once all of the fields have been completed click on the Submit Request button to submit the leave request to workflow.

You will receive an email confirming that the request has been submitted to workflow.

As the request progresses through the workflow and is approved or declined by the relevant approver(s), email notifications will be sent to your the employee and the relevant approvers.

Leave Calendar

A leave calendar will be displayed just below the leave request fields. The calendar will automatically centre itself on the month corresponding to the month of the Leave Start Date selected, and will display information for two months prior to that date as well as two month after that date, giving detail for a total of 5 months.

The calendar will include the following information:

- The employees non-working days (usually weekends)
- Public Holidays
- Approved leave
- Leave requests still in workflow

Example - Typical ESS Leave Request Workflow

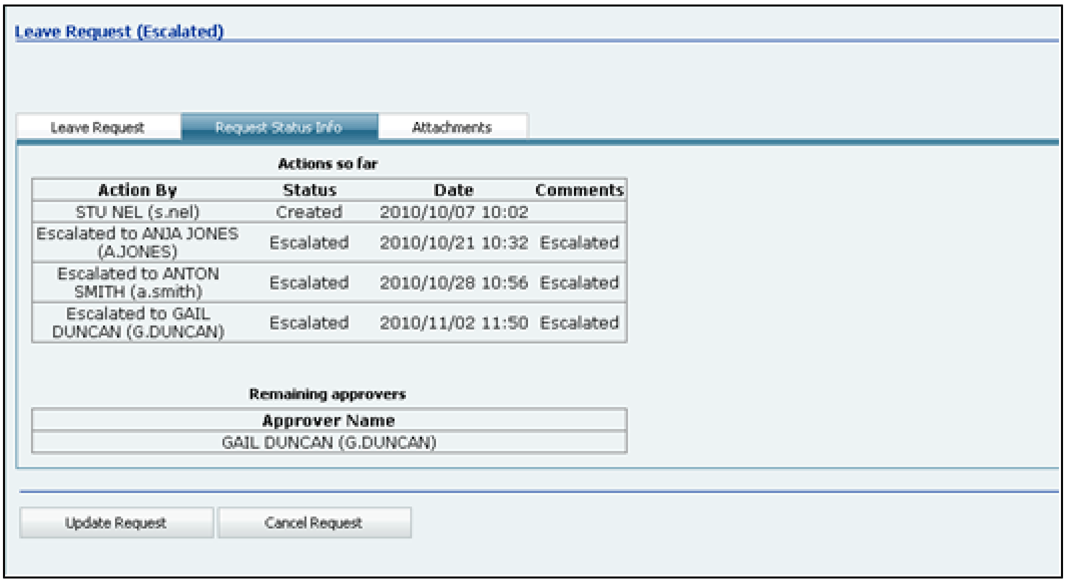
1. You apply for leave.
2. The leave approver will be notified of the leave request via e-mail.
3. The leave approver may select to approve or decline the request.

4. Once the approver has approved the request, it will be forwarded to the next level.
5. HR/Payroll is usually the final approver in the process.
6. Once HR/Payroll has approved the request, an e-mail will be forwarded to you, detailing all leave and approval information.
7. You will receive a confirmation e-mail after the leave request has been approved by each leave approver.
8. The Employee Leave Record in the Premier Payroll Application will be updated accordingly.

ESS Leave Request Workflow Process

The Request Status Info Tab allows you to view the actions which have taken place so far as well as the remaining approvers in the workflow.

Example:


Leave Request (Escalated)

Leave Request | Request Status Info | Attachments

Actions so far

Action By	Status	Date	Comments
STU NEL (s.nel)	Created	2010/10/07 10:02	
Escalated to ANJA JONES (A.JONES)	Escalated	2010/10/21 10:32	Escalated
Escalated to ANTON SMITH (a.smith)	Escalated	2010/10/28 10:56	Escalated
Escalated to GAIL DUNCAN (G.DUNCAN)	Escalated	2010/11/02 11:50	Escalated

Remaining approvers

Approver Name
GAIL DUNCAN (G.DUNCAN)

Update Request | Cancel Request

Leave in Progress

You can view the status of leave request that are in progress by clicking on the Leave in Progress link on the menu.

This will open the Requests In Progress screen which will list all current requests.

The following information will be displayed for each request:

- Leave Request Type
- Status
- Description
- Request Parked status
- Parking Expiration
- Assigned To

To view more information regarding a particular request, click on the view link next to the relevant request.

This will open the Leave Request (In Progress) screen. This will display the information that was captured when the leave request was submitted.

If the leave request has not yet been approved by any of the assigned approvers, the request may be edited or cancelled.

Leave Balances

You can view your leave balances for all leave types by clicking on the Leave Balances link on the menu.

This will open the Leave Balances screen

Details of each leave type are given, including the following detail:

- Cycle Entitlement
- Leave Due at start of the current leave period
- Leave entitlement for the current period
- Leave taken in the current period
- Transactions pending approval in workflow
- Transaction cancellations pending approval in workflow
- Total leave due
- Planned Leave

There is also a link on each leave line to access the detail of all historical transactions for the particular leave type.

This will display a list of transactions for the particular leave type, with the detail of each transaction.

Leave Calendar

The Leave Calendar link opens the Leave Calendar report, which displays a graphical view of your leave for a 13 month period centred on the current month.

The calendar will include the following information:

- The employees non-working days (usually weekends)
- Public Holidays
- Approved leave
- Leave requests still in workflow

A legend is provided at the bottom of the screen that describes the various colour codes and leave type abbreviations used on the calendar.

The calendar can be exported to the following types of output:

- CSV
- XLS
- PDF
- RTF

The detail of each transaction displayed on the calendar can be viewed using one of the following methods:

- Hover the mouse pointer over one of the highlighted fields to get detail of the request.
- Click on the Transaction Detail tab above the calendar to get detail of all the transactions displayed on the report.

Leave Report

The Leave Report link opens the Leave report criteria screen.

The following criteria can be selected before generating the report:

- Leave Type - The report can be generated for specific leave types or for all leave types
- From Date and To Date - The date range for which leave transactions must be included
- Show approver comments - When this option is selected, any comments that were added to a transaction at the time of approval will be included in the Report

Once the relevant selections have been made, the report can be viewed.

The report can be exported to the following types of output:

- PDF
- XLS
- RTF
- MHT
- Text
- Image

Passwords

If the ESS user enters the incorrect username and/or password, they will receive a message on the login screen:

" Your username and/or password is not valid."

Forgotten Password

If you have forgotten your password, you can request a password reset, by clicking on the Forgot Password link on the menu.

This will open the Forgot Your Password screen.

Enter your username and email address (as held in the ESS database).

The system will validate that the username and email address matches the information held in the ESS database.

If these validate, then a new system generated password will be automatically emailed to the user.

After logging in using the new password, you may be prompted to change the password to one that is easier to remember.

Changing your Password

Should you wish to change your password or need to change the system generated password after resetting your password, this can be done after logging into the application.

Click on the Change Password link on the menu, which will open the Change ESS Password screen.

You will be prompted for your current password, your new password and a confirmation of your new password. You can then click on the Change Password button to change your password.

You will then receive a confirmation that the password has been successfully changed.

Management Tasks

This section outlines the functionality available to managers and approvers. Approves will have access to all the functionality of a normal employee as well as additional functionality such as:

- Approval of requests
- Leave reports
- Nominated Approvers

The approvers have an additional section on their summary screen, which is the Inbox. This will provide a list of requests that require approval.

Request Approval

When a request has been submitted, the approver will receive an email similar to the one shown below.

The approver will then be able to click on the link at the bottom of the message, which will open the ESS website and the approver can login as normal.

Once the approver has logged into the application, they can select the appropriate link under their Inbox, which will open the Approvers Inbox Items list.

The approver can then select the appropriate request by clicking on the View link, which will open the detail of the request.

The approver can then approve the request by clicking on the Approve Request button.

Leave Reports

All approvers have access to various leave reports, namely:

- Leave Balances Report
  - This will provide the approver with a detailed of employees leave balances for selected leave types.
- Leave Transactions Report
  - This will provide the approver with a detailed list of leave transactions for a selected date range.
- Manager Leave Calendar Report
  - This will provide the approver with graphical view of all leave transactions for a 31 day period from thee date selected.

The approver has various selection, grouping and sorting options for the reports.

The output of the reports can be exported to common formats such as PDF, Excel or CSV for archiving or further manipulation.

Nominated Approvers

When an approver goes on leave, he/she may activate the 'Out of Office' feature.
This feature allows for the following:

- The approver can specify the From and To dates when he/she will be on leave.
- The approver can select a Nominated Approver to approve requests on his/her behalf for the time out of the office.

How to Activate the 'Out of Office' Feature

1. On the ESS Summary Page, click on the arrow next to the Home option in the Navigation Bar.
2. Click on the My Settings link.
3. The My Settings Screen will be displayed.
4. Click on the down-arrow of the Out of Office From Combo box. Use the calendar and select the required date. Click on the down-arrow of the Out of Office To Combo box. Use the calendar and select the required date.
5. In the Nominated Approvers section, select the applicable approver(s).
6. When you click on the button, you will be able to send the nominated approver(s) an e-mail to notify him/her. Click on Send.
7. Click on Update.

Document Attachments

Documents may be attached when requests are submitted on ESS.

Documents are attached from the Attachments Tab on the request submission screen.

How to Attach Documents

1. Complete the request details on the Request Tab.
2. Click on the Attachments Tab.
3. Click on Browse in the Add Attachments section. Take note of the maximum file size and allowed file types, as indicated on the screen.
4. Locate the file and click on Open.
5. Type additional information in the Comments field, if required.
6. Click on Upload File.
7. The file will be displayed in the bottom section of this screen. There is no limit on the number of files that may be attached.
8. Click on Submit Request. Attachments will only be saved once the request has been submitted.