sage X3

Release User Documentation

Sage Enterprise Management Payroll
ESS – Employee Self Service
(Updated)
V12 2018 R3

03 2018

Contents

Circulation

Document revision history

Date	Version	Detail	Author
11/27/2017	Version 1.0	First Draft	Marizelle Wilgenbus
11/29/2017	Version 1.1	Edited	Lizane Loots
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This document details all items that will be included in the V12 2018 R3 release for Employee Self Service (ESS).

Audience

This document is aimed at all the consultants and business partners that will be implementing and maintaining the Sage Enterprise Management Payroll system.

Features

The following Employee Self Service (ESS) features are included in the V12 2018 R3 release:

- Employee.
- Leave.
- Expense notes.
- Leave.
- Payslips.
- Manager self service.

Employee Self Service (ESS)

This is payroll made personal. Self service for you and your employees. ESS (Employee Self Service) and MSS (Manager Self Service) rolled up into one.

Some of the features of ESS and MSS include the ability for employees to make changes to personal information, apply for leave, view and print payslips and submit expense notes online, anywhere, anytime.

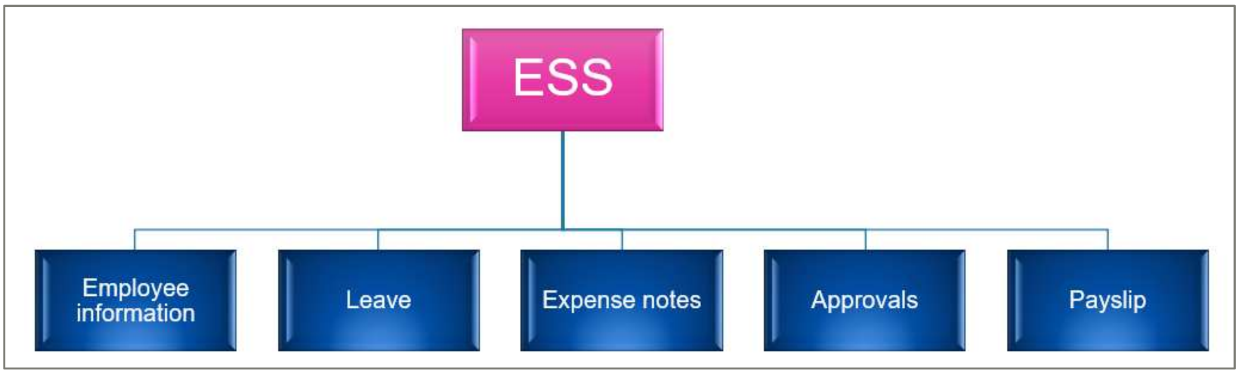
Managers are able to submit requests on behalf of employees and to approve requests through customised workflows.

Design overview

Purpose

An employee can log in and access ESS to:

- View, add or change specific employee information.
- Capture leave transactions.
- Capture expense notes transactions.
- View and print payslips.



Setup

The ESS workflow requires the following areas to be defined:

- **User setup:**
  - The user setup must be done per employee and manager.
  - ***Access:*** *Setup > Users > Users*
    - Specify the workflow e-mail addresses.
    - Link the Employee code *(Parameter definition tab > Common data (DEF) > Detail > REFNUM).*

- **Signature management:**
  - Signature management determines which hierarchy to use for the workflow.
  - ***Access:*** *Setup > Workflow > Signature management*
    - The following workflow codes are applicable for ESS:
      - EXSMOD: Expense notes.
      - DGCMOD: Leave.
      - ESWDMOD: Employee.
      - Link the employee to the ESS supervisor on the Employment contract (*GESCTR) > Supervisor* tab.

ESS process flow

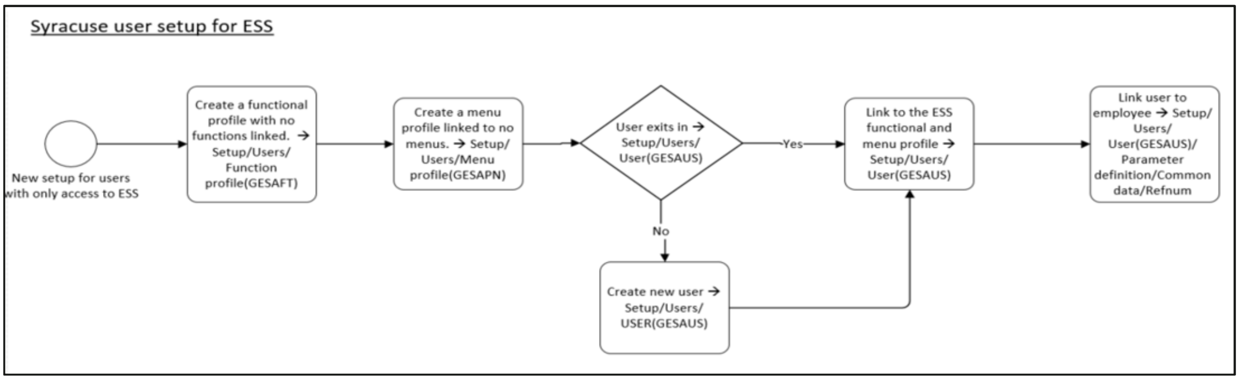
A typical ESS process flow consists of the following:

- The employee submits a transaction.
- The manager receives an email notification.
- The manager can view the approval from the ESS/MSS Approvals tab.
- The approval status is actioned by the manager from the Approvals tab with a status of “Accept” or “Reject”.
- The employee is notified of the approval status via email.
- The employee can view the transactions in ESS.

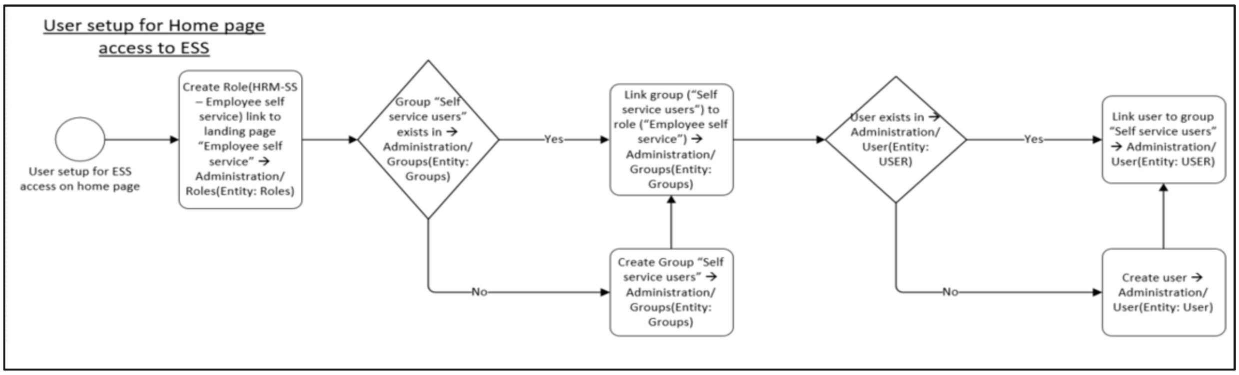
ESS – Setup users

Process flow to setup ESS only users

Syracuse user setup for ESS



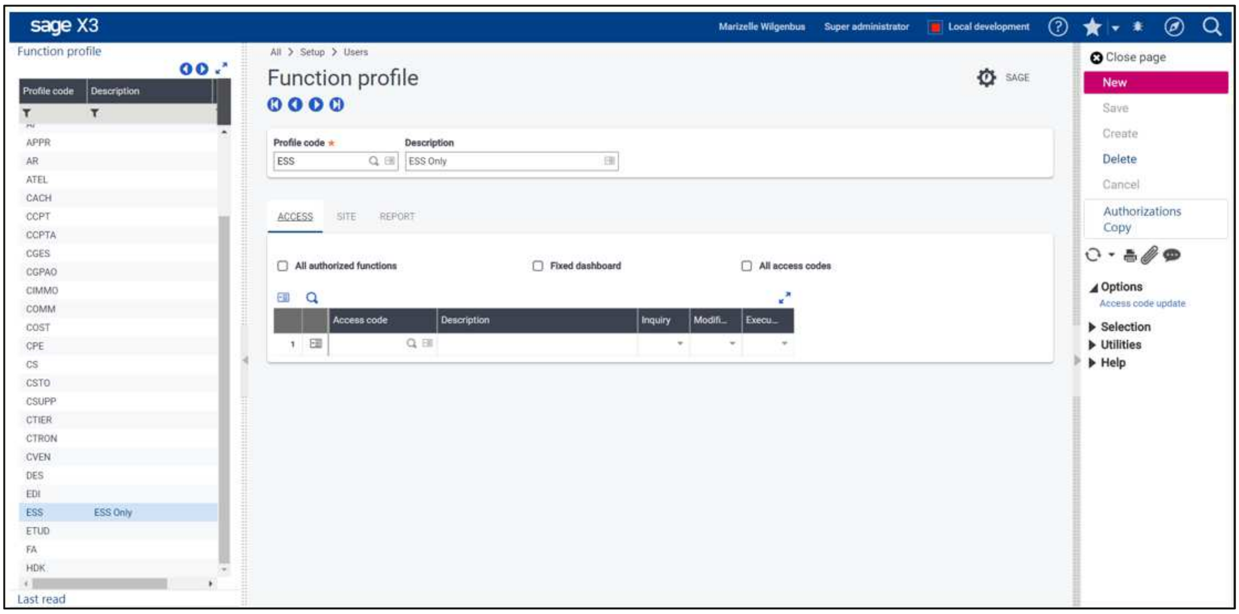
User setup for home page access to ESS



Syracuse user setup

Creating a new functional profile

Access: Setup > Users > Function profile (GESAFT)

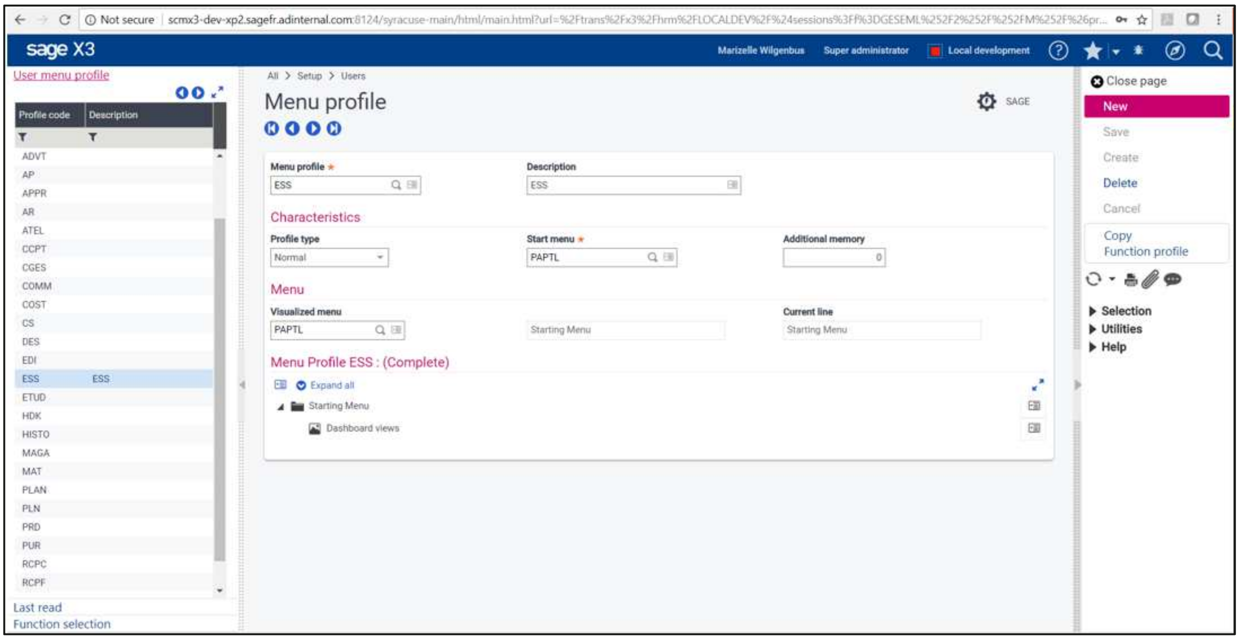


This setup caters for employees who are only allowed to see ESS. Employees who need to see more functions can be linked to other function profiles.

- Add a functional authorization for the ESS profile code and link the function VALEMPESS. (Access to this function is needed to view payslips).

Creating a new menu profile

Access: Setup > Users > Menu profile (GESAPN)



This setup caters for employees who are only allowed to see ESS. Employees who need to see more functions can be linked to other menu profiles.

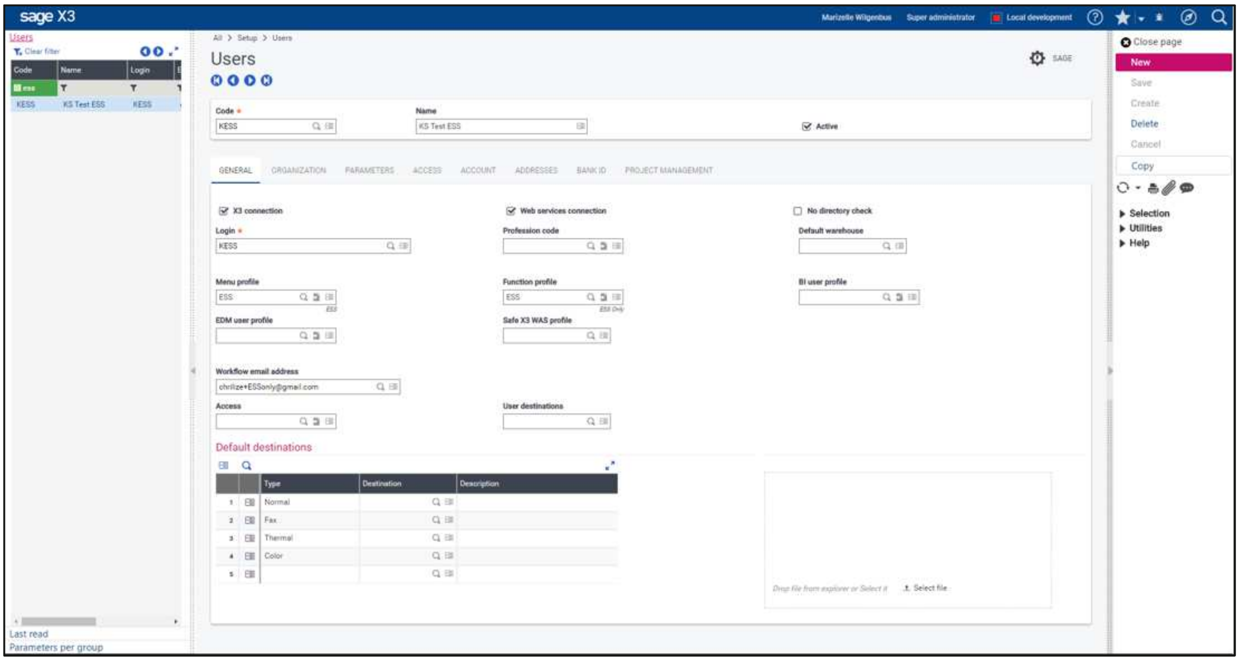
Enter a menu profile and description that clearly explains what the profile is used for.
Example:

- Profile code: ESS
- Title: ESS only
- Profile type: Normal
- Start menu: Type in a new option (i.e. do not select an option from the list).

Click on Create.

Creating a new user or linking an existing user to the menu and functional profiles

Access: Setup > Users > Users (GESAUS)

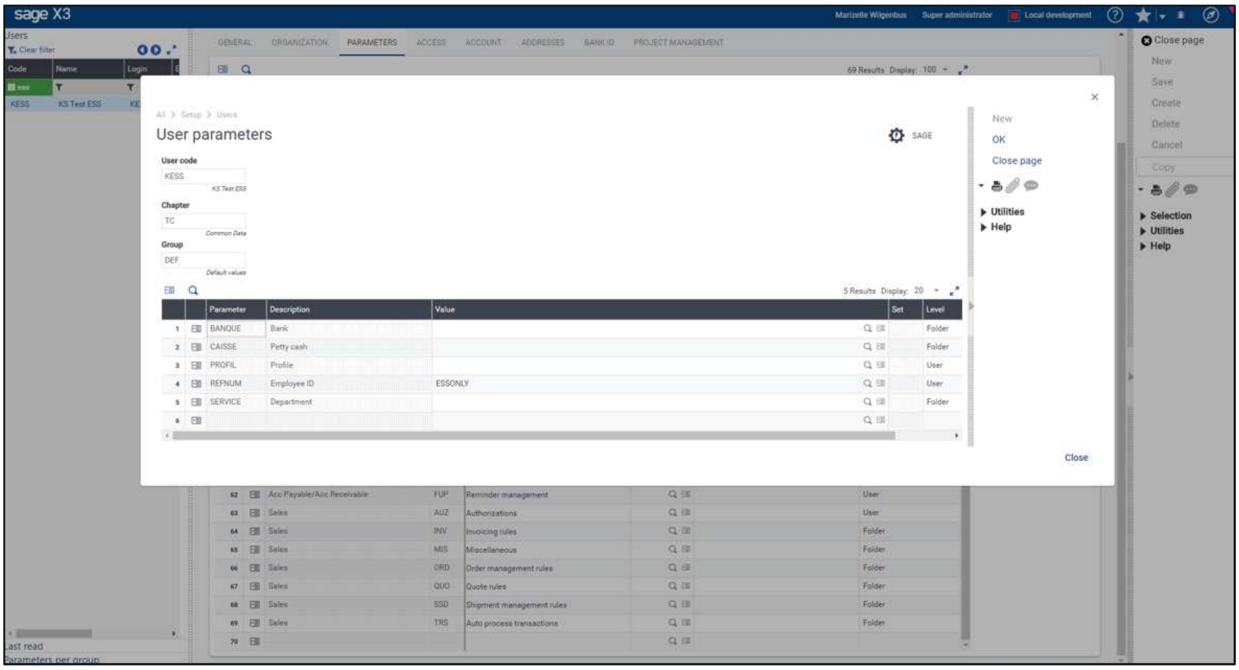


Create a new user:

- It is important that you use the same login when you create a user for the home page setup.
- For the menu profile and function profile you must select the new ESS only options that you have created.
- The following section will show how to link an employee to the user.

Linking the user to an employee

Access: Setup > Users > Users (GESAUS)



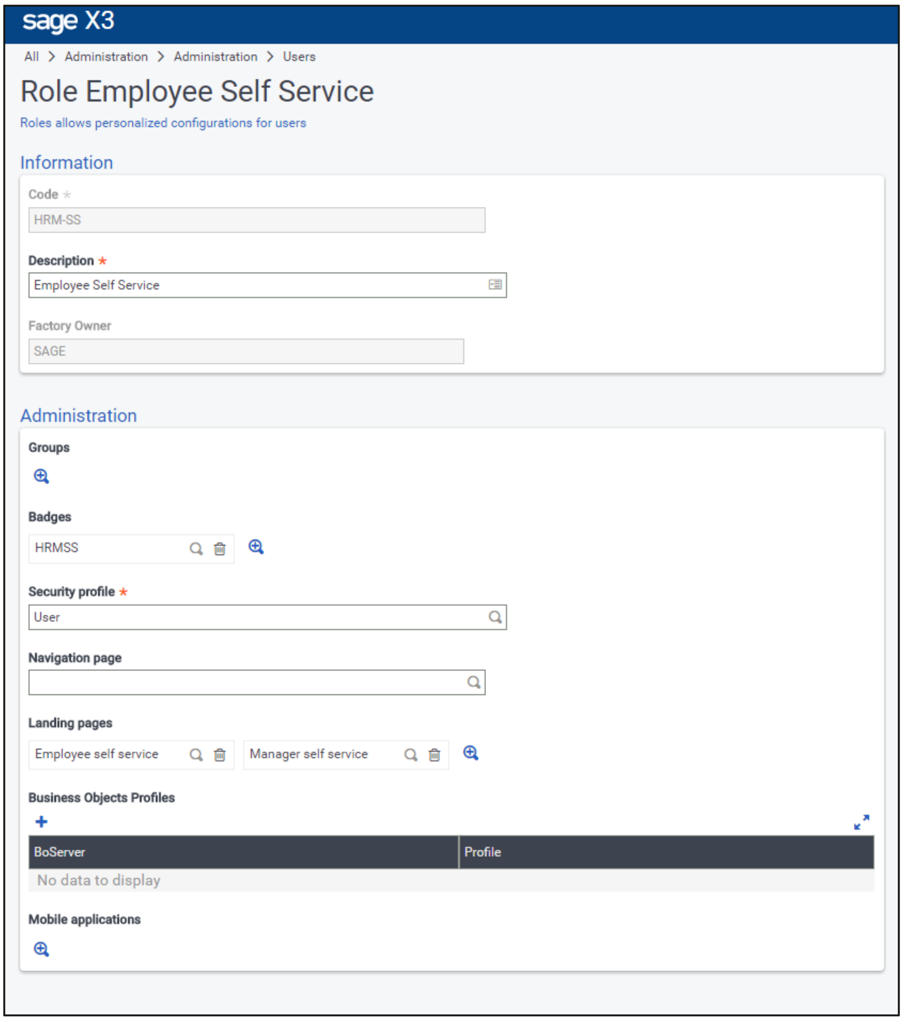
Access the Parameter definition tab.

- Open the details for TC (Common data) – DEF (Default values).
- In the REFNUM (Employee ID) field, search for and select the employee that must be linked to the user.
- Click on OK and save the changes.

User setup for home page access

Link the user to the HRM-SS role

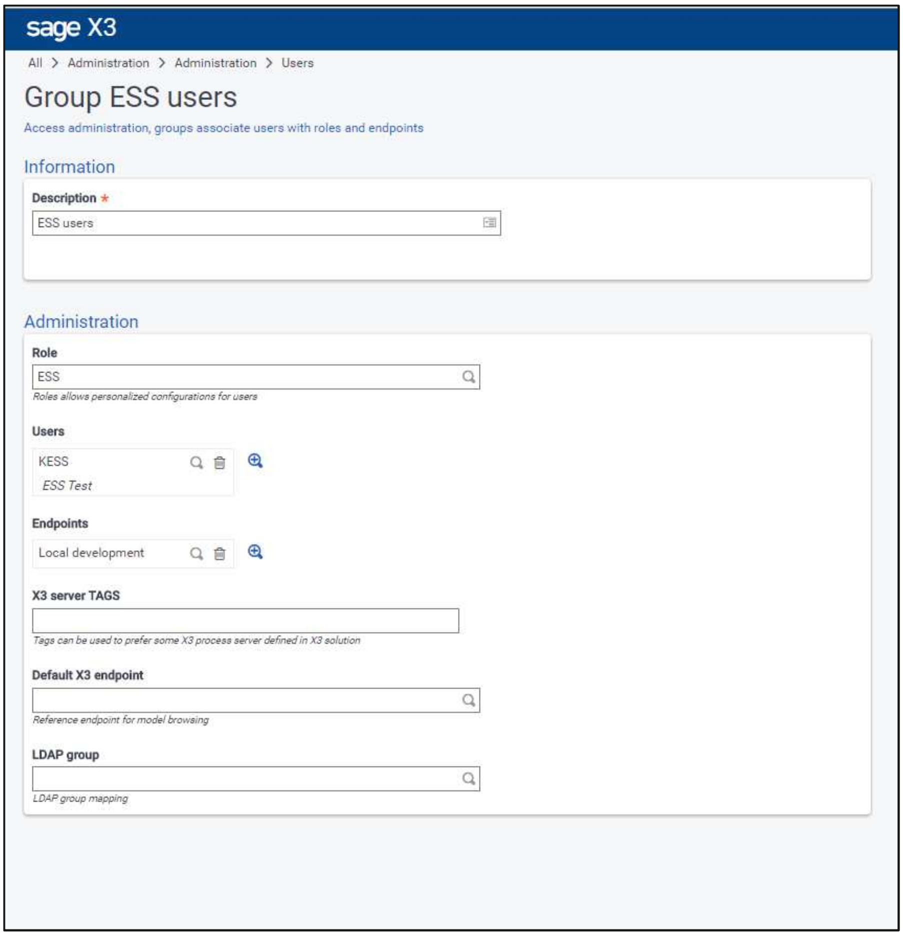
Access: Administration > Roles (Entity: Roles)



- Code: HRM-SS.
- Description: Employee self service.
- Security profile: User.
- Landing page: Link the Employee self service page. If the user is a manager, also link the Manager self service page.

Create an ESS group

Access: Administration > Groups (Entity: Groups)



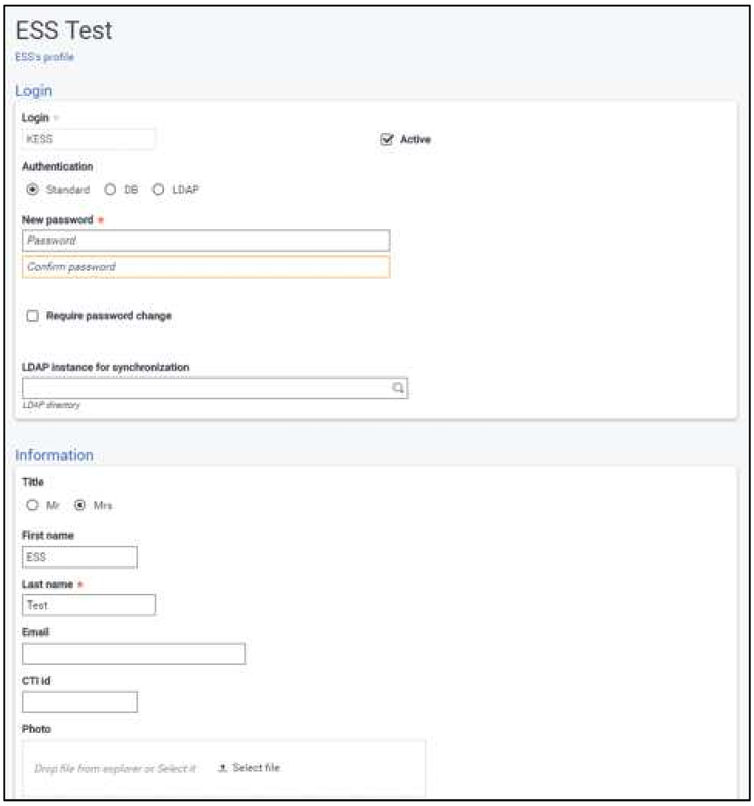
Create a group with values that clearly indicates what the role is used for.

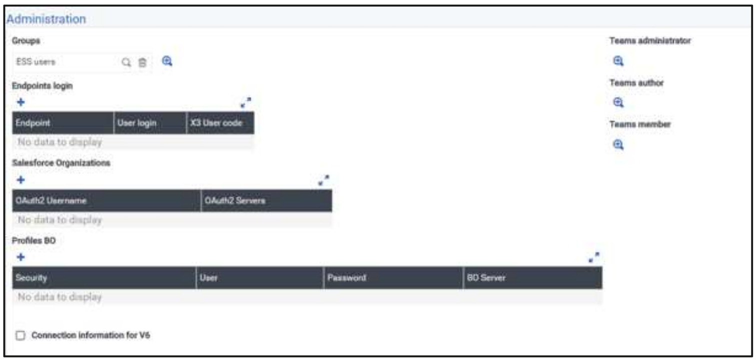
Example:

- Description: Self service users.
- Role: Select the role you created for ESS users.
- Endpoints: Search for and select the endpoints that will use this group. (Ensure that at least one endpoint is selected).

Create an ESS user

Access: Administration > Users (Entity: Users)





- Login: Use the same Login name as the one used to create the Syracuse user.
- The setup for the user is standard. It is important to select the group that was created for Self service users.
- The correct endpoint must also be selected.

ESS – Employee

Employee overview

Areas

- Employee record information (GESEML) and Employment contract information (GESCTR):
  - Civil status.
  - Address.
  - Admin.

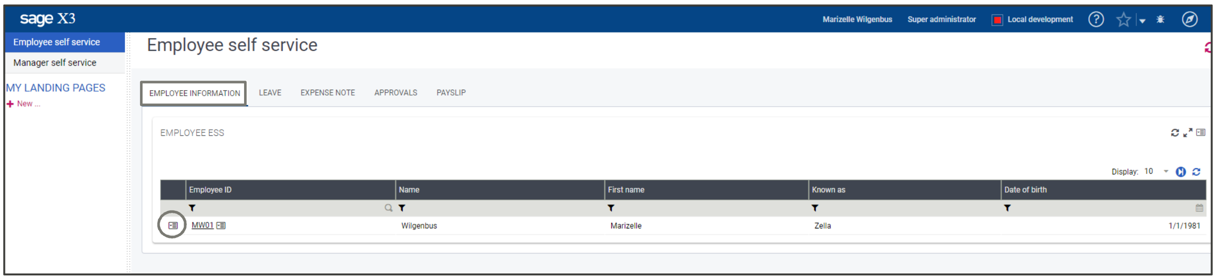
Employee home screen

The employee details will be displayed on the Employee home screen:

- Employee ID.
- Name.
- First name.
- Known as.
- Date of birth.

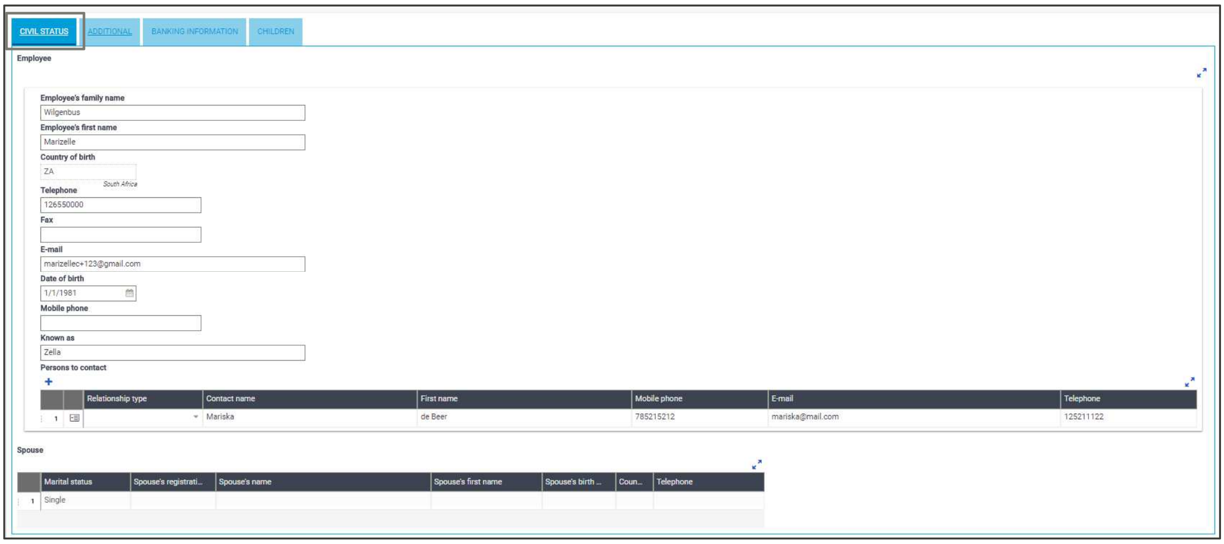
Employee information:

- Click on the Action button for the employee record to be opened.
- The user will be able to view, modify, add or remove certain information:



- Click on Edit for the different tabs to be displayed.
- The user will be able to add, modify or delete information:

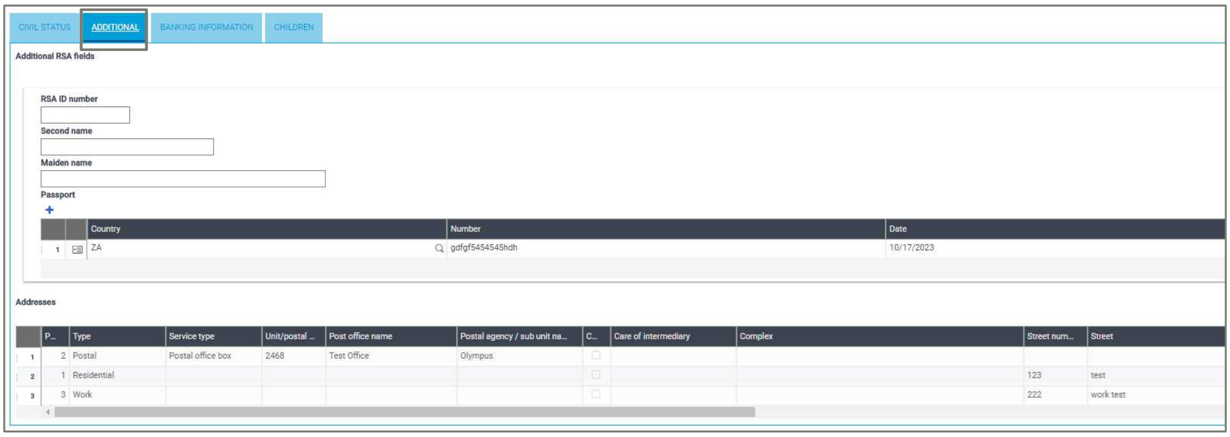
Employee information: Civil status



The following details can be viewed, modified, added or deleted from the Civil status tab:

- Personal information.
- Persons to contact.
- Spouse information *(this information is view only)*.

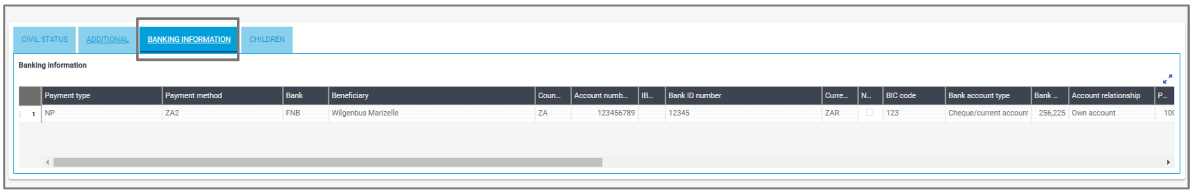
Employee information: Additional



The following details can be viewed, modified, added or deleted from the Additional tab:

- ID number.
- Second name.
- Maiden name.
- Passport.
- Addresses *(this information is view only)*.

Employee information: Banking information



Banking information can be viewed from this tab.
Employees will not be able to add or modify banking details.

Employee information: Children

Child information can be added, viewed or deleted from this tab.

Process

Steps of the workflow process:

1. The employee modifies, deletes or adds information on the relevant tabs.
2. The manager receives an email notification of the change request.
3. The manager logs in to Sage Enterprise Management Payroll > MSS > Approvals and approves or declines the request.
4. If approved, the changes are applied in ESS and Sage Enterprise Management Payroll (on the GESEML – Employee record, or GESCTR – Employment contract record respectively).
5. If declined, no details are updated.
6. The employee receives an email notification confirming that the change request has been approved or declined.

Note: The workflow query tool (AREQUETE) is used to monitor ESS workflow items.

ESS – Leave

Overview

Purpose

To view all leave transactions as well as additional details such as accumulated leave and leave days taken.

- Users will be allowed to create, view and cancel leave transactions.
- Modify of transactions are not available.
- Users can add attachments.
- ESS transactions will be updated to the relevant Sage Enterprise Management Payroll leave areas (e.g. GESDCG – Entry of absence screen).
- Transactions captured from either Sage Enterprise Management Payroll or ESS, will reflect and can be viewed from both areas.

> **Note:** It is important that leave has been set up in Sage Enterprise Management Payroll before start using ESS.

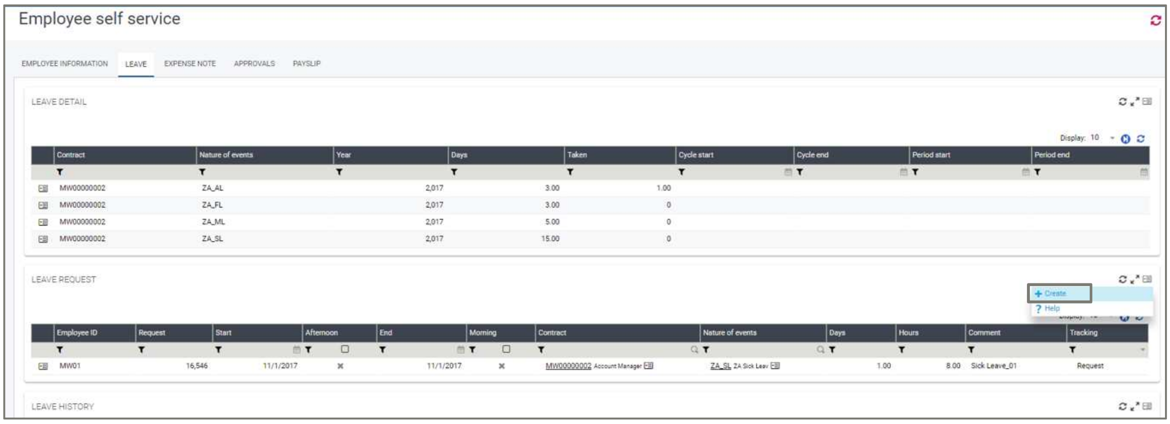
Areas

- Leave details (GESCNE):
  - Cycle information such as accumulated and taken leave per leave type.
- Leave request (GESDCG):
  - Requests awaiting approval (including cancellations).
- Leave history:
  - Accepted or rejected transactions (including cancellation approvals).

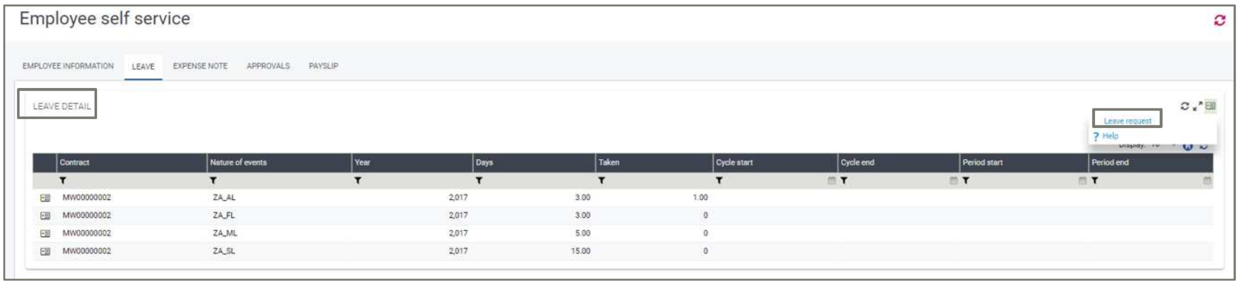
Create leave requests

An employee can apply for leave in the following ways:

- Log into *Sage Enterprise Management Payroll > ESS > Leave*, then click on *Create* in the Leave request section:



- Click on the *Action button* > *Leave request* on the Leave Detail section:



- Click on C*reate/Leave request.* Capturing can take place on the Leave request screen:

Once all the mandatory fields have been completed and saved, the workflow will be kicked off. See the “Workforce process” section below for more information.

Leave attachments

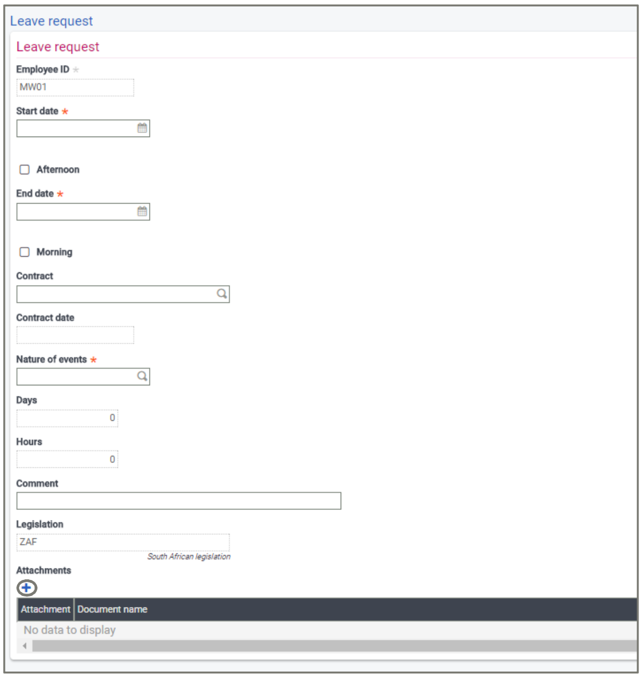
Several attachment types can be added to a leave request:

Examples:

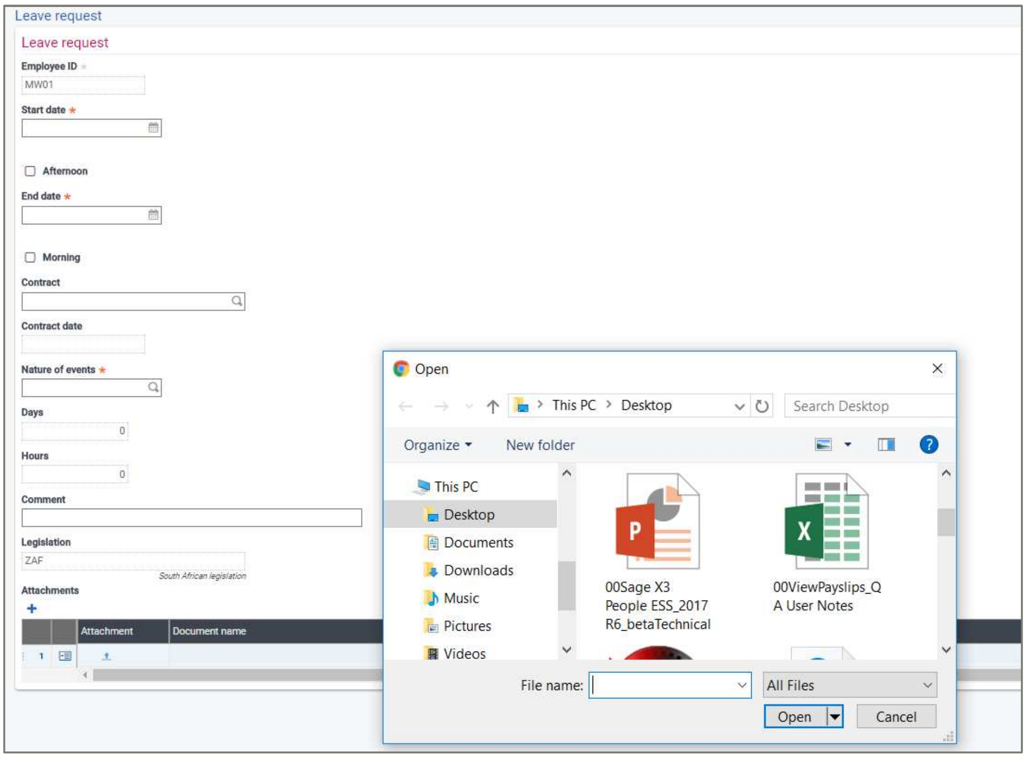
- MS Excel.
- PDF.
- Jpeg.
- MS Word.
- RTF.

Note: Multiple attachments can also be added to a leave request.

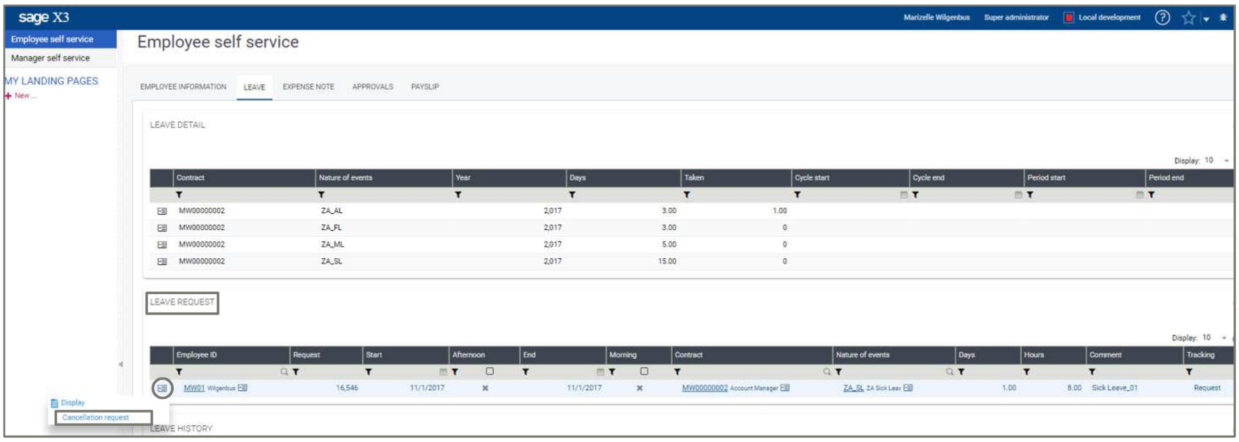
Click on the + button in the Attachments section, to add attachments:



Browse for the relevant attachment by clicking on the Upload icon:



Cancel leave request



To cancel a leave request, click on the Action button of a pending/approved leave transaction and select Cancellation request:

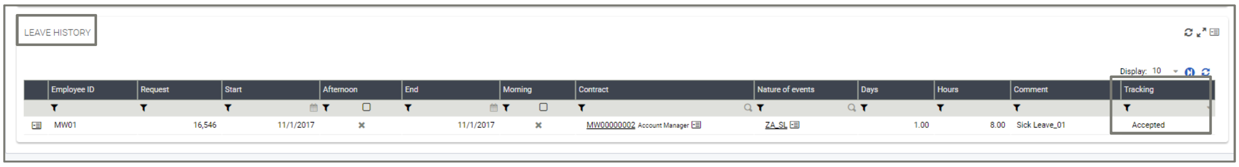
From the Leave request section:
Should a cancellation be submitted, the leave transaction will be removed (deleted) from the Leave request section, from Approvals, as well as from Entry of Absences (GESDCG).

From the Leave history section:
The leave transaction status will be displayed as Cancellation request and the workflow will be kicked off for approval.

Leave transactions with the following status cannot be cancelled:

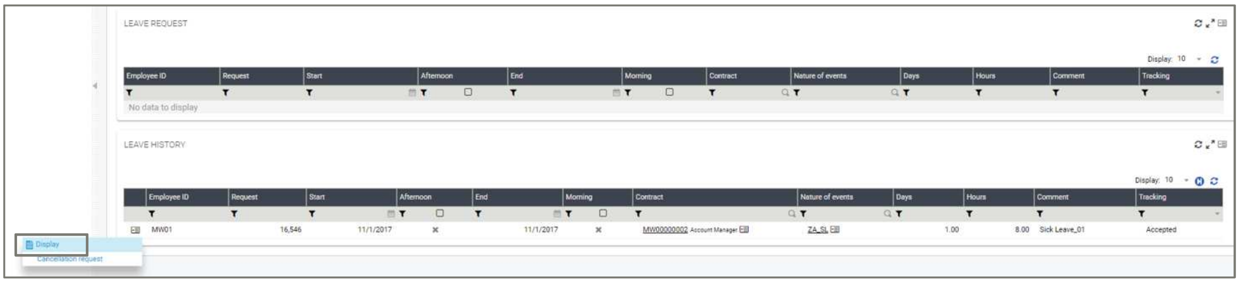
- Rejected.
- Cancellation request.
- Cancellation accepted.
- Cancellation rejected.

View approved/rejected leave requests



Leave requests that have been accepted or rejected by a manager will show in the Leave history section.

To view an accepted/rejected leave request, click on the Action button > Display:



Process

Steps of the workflow process:

1. The employee submits a leave request.
2. The manager receives an email notification of the request.
3. The manager logs into Sage Enterprise Management Payroll > MSS > Approvals and accepts or rejects the request.
4. If accepted, the request moves to ESS > Leave History with a status of “Accepted” and balances are updated accordingly in the Leave detail section.
5. If rejected, the leave request will move to ESS > Leave History with a status of “Refused”.
6. Leave transactions will also update the Entry of Absences (GESDCG) and Leave by Employee (GESCNE) screens.
7. The employee receives an email notification confirming that the leave request has been accepted or rejected.
8. The employee can cancel a pending or accepted leave transaction. The latter will then kick off the above workflow process again.

ESS – Expense notes

Overview

Purpose

To view all Expense note transactions.

- Users must be allowed to submit new expense note claims.
- Cancel and modification of transactions are not possible.
- Users with access to Expense notes, must cancel transactions from Sage Enterprise Management Payroll Expense notes (GESHREXS).
- Users can add attachments.
- Transactions from either Expense notes in Sage Enterprise Management Payroll (GESHREXS) or ESS Expense notes, will reflect and can be viewed from both areas.

Note: It is important that the Expense notes setup has been done in Sage Enterprise Management Payroll before using ESS.

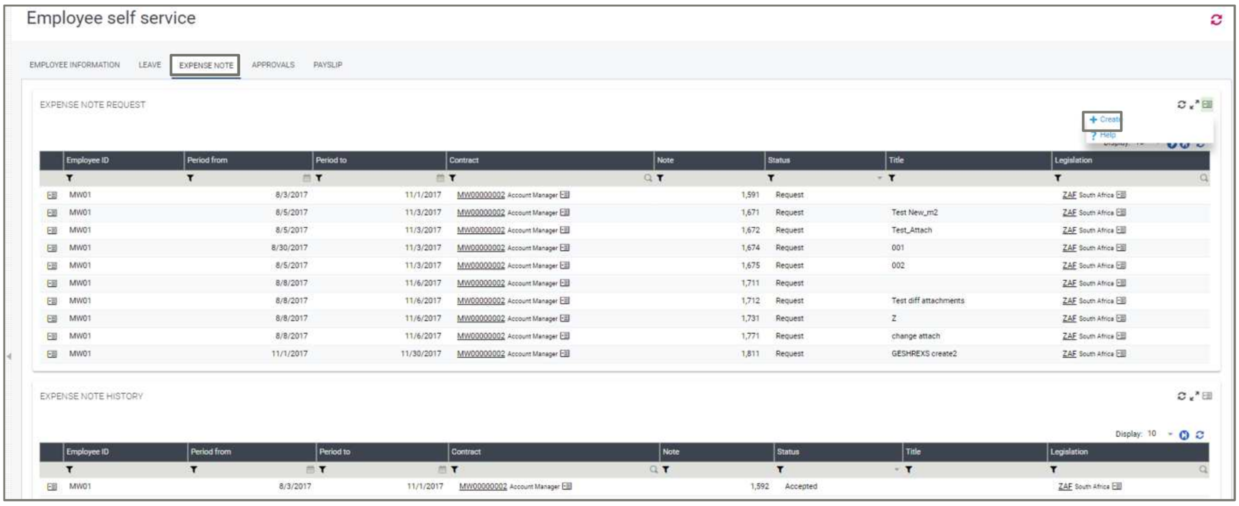
Areas

- Expense notes request (GESHREXS):
  - Requests awaiting approval.
- Expense notes history (GESHREXS):
  - Accepted or rejected transactions.

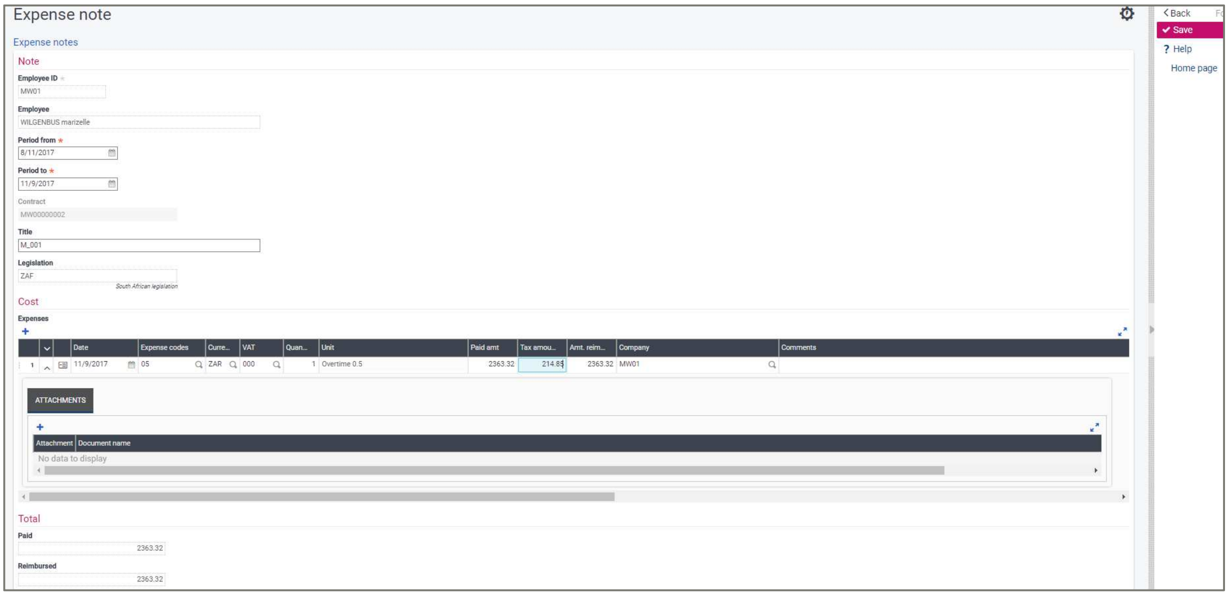
Create an Expense note

An employee can create an expense note in the following ways:

- Log into *Sage Enterprise Management Payroll > ESS > Expense notes* and click on *Create* in the Expense note request section:

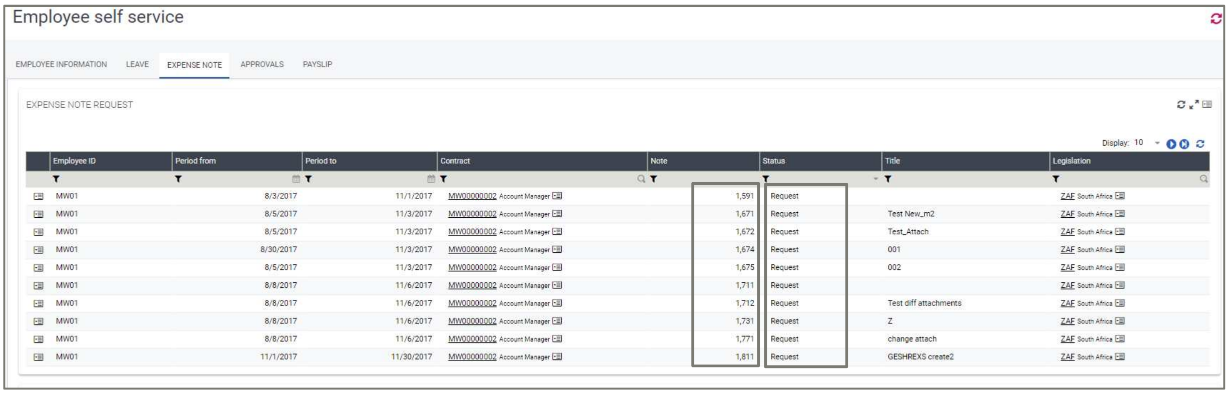


- Click on *Create.* The Expense note capturing screen will be displayed:



Once all the fields have been completed and saved, the workflow will be activated and the request will reflect in the Expense note request section with a status of “Request”.

A unique Expense note number will also be issued for the transaction:



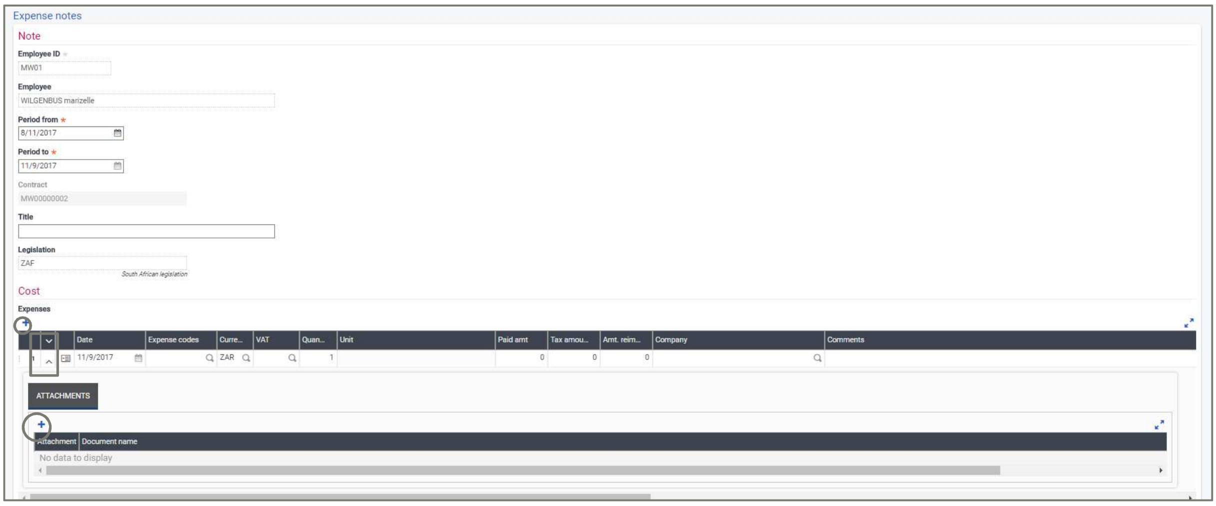
Expense note attachments

Several attachment types can be added to a single Expense note.

Examples:

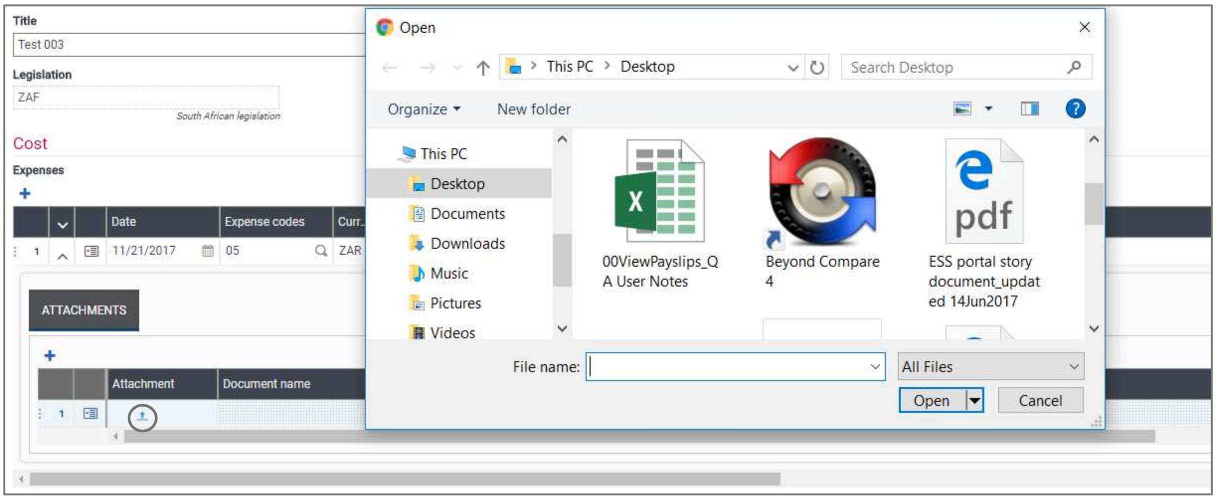
- MS Excel.
- PDF.
- Jpeg.
- MS Word.
- RTF.

To add attachments to an Expense note, click on the drop-down arrow for the attachment box to be displayed:



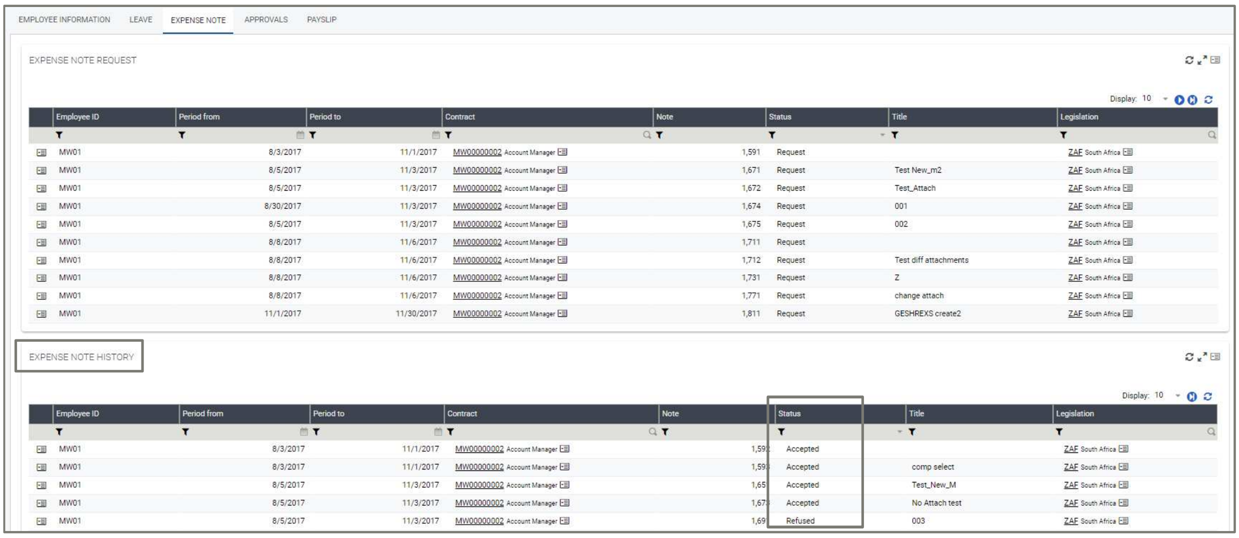
Click on the Add button to open the attachment block.

The File icon can be selected to browse for the relevant file to be attached:

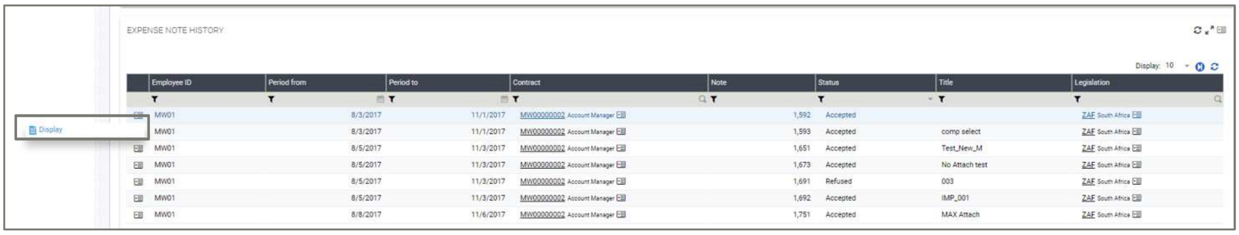


View accepted/rejected Expense notes

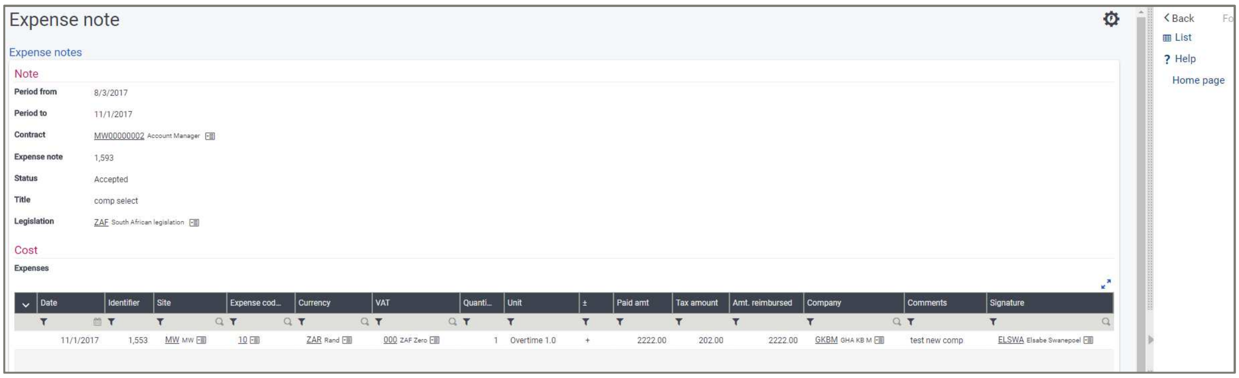
Expense notes that have been accepted or rejected by a manager will show in the Expense note history section:



To view an accepted/rejected transaction, click on the Action button > Display:



Details of the expense note will be displayed as follows:



Process

Steps of the workflow process:

1. The employee submits an Expense note.
2. The manager receives an email notification of the request.
3. The manager logs in to Sage Enterprise Management Payroll > MSS > Approvals and accepts or rejects the request.
4. If accepted, the request moves to ESS > Expense note history with a status of "Accepted".
5. If rejected, the request will move to ESS > Expense note history with a status of "Refused".
6. The employee receives an email notification confirming that the expense note request has been accepted or rejected.

ESS – Payslip

Overview

Purpose

- The employee can view all his/her payslips.
- The employee can print the payslips to hardcopy, from PDF.
- No workflow or approval is applicable, therefore the Approval tab is not available.

Note: The Sage Enterprise Management Payroll payslip setup must be done before using ESS. Setup documents are available on request.

Note: Only payslips with a *Printed* status in Sage Enterprise Management Payroll (GESVEP – Employee payslips) will be displayed.

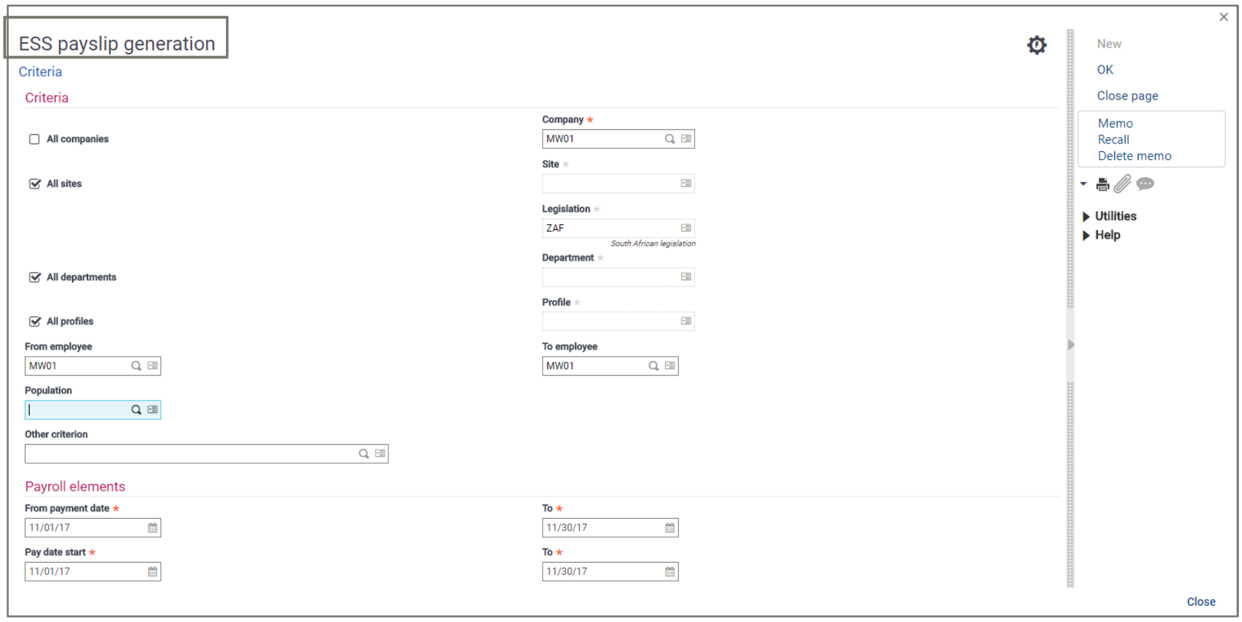
Areas

- Payslip generation (GESVEP).
- Pay month (MOIPAY).
- ESS payslip generation (ESSEMLPAY).
- ESS > Payslips.

Release payslips to ESS

Paylips will not be visible in ESS unless it has been released though the ESS payslip generation (ESSEMLPAY) function.

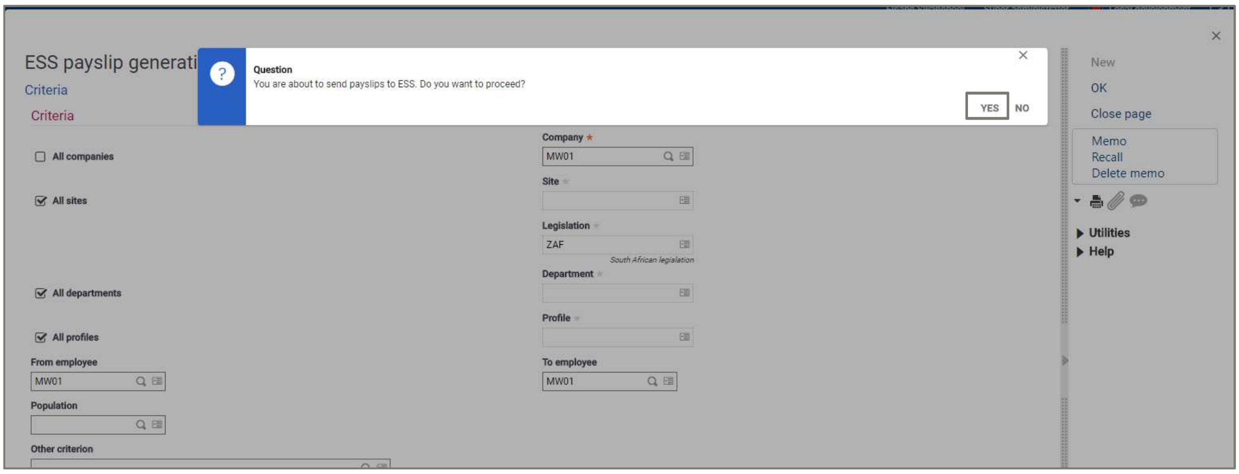
Once a payslip has been calculated, the ESS payslip generation (ESSEMLPAY) function can be called. The following screen will be displayed:



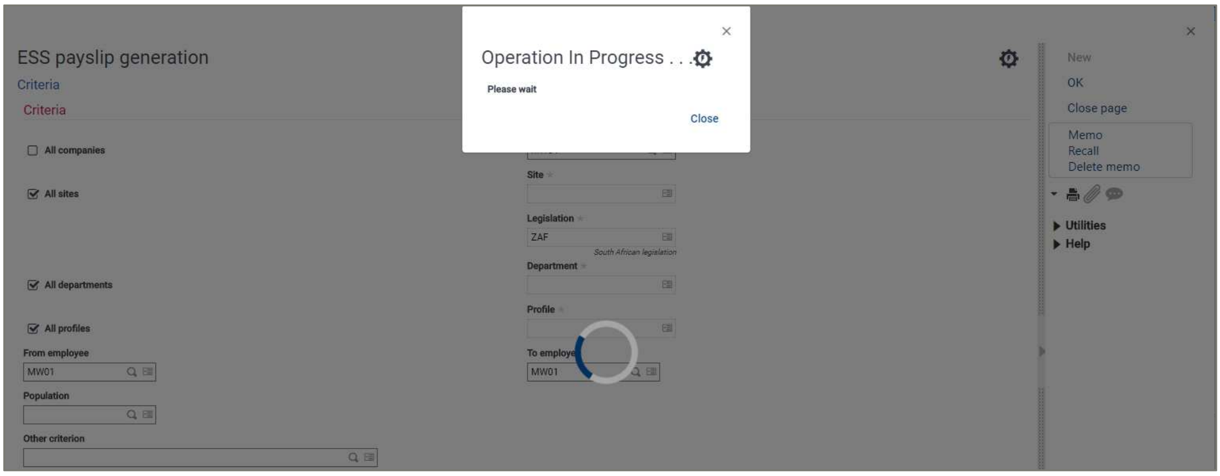
On the ESS payslip generation screen there are different criteria options for the generation of a payslip:

- **All companies**: If selected, the payslips for all companies will be released to ESS for employees to view.
- **Company**: The user can type in a company code or select the applicable company from the Lookup icon. The payslip will only be released for the selected company's employees.
- **All sites**: If selected, the payslips for all sites will be released to ESS for employees to view.
- **Site**: The user can type in a site code or select the applicable site from the Lookup icon. The payslip will only be released for the selected site's employees.
- **Legislation**: The user can type in a legislation code or select a legislation from the Lookup icon. The payslip will only be released for the selected legislation.
- **All departments**: If selected, the payslips for all departments will be released to ESS for employees to view.
- **Department**: The user can type in a department code or select the applicable department from the Lookup icon. The payslip will only be released for the selected department's employees.
- **All profiles**: If checked, the payslips for all profiles will be released to ESS for the employees to view.
- **Profile**: The user can type in a profile code or select the applicable profile from the Lookup icon. The payslip will only be released for the selected profile's employees.
- **From employee**: The user can enter a range of employees for which he/she wants to make the payslips available in ESS.
- **To employee**: The user can enter a range of employees for which he/she wants to make the payslips available in ESS.
- **Population**: The user can type in a population code or select a population from the Lookup icon. The payslips will only be released for the selected population's employees.
- **Other criterion**: The user can specify any other criteria to indicate which payslips must be released to ESS.

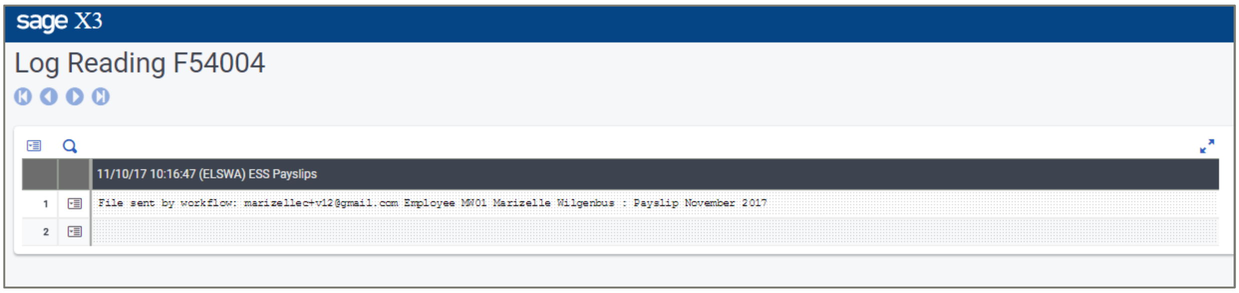
Once the relevant criteria has been specified, click on OK.
Click on YES when the following message is displayed:



The user will then be notified that the process is in progress:

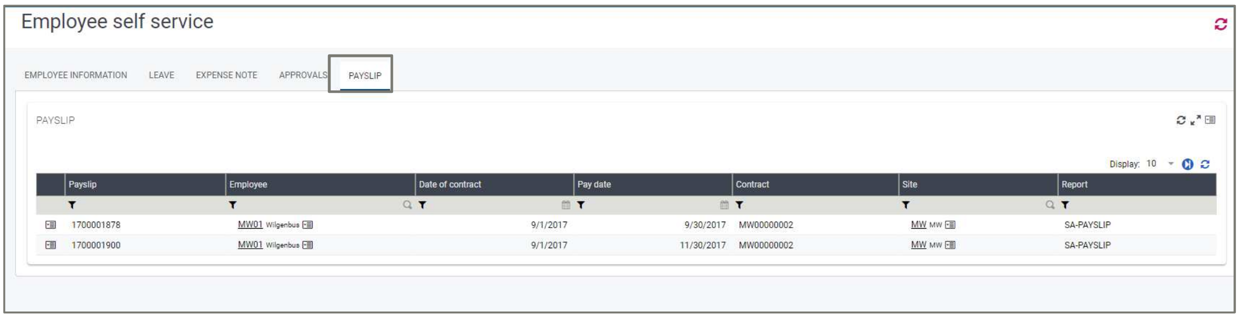


Once the process has been completed the log will indicate which payslips have been released to ESS (this is based on the criteria selected):

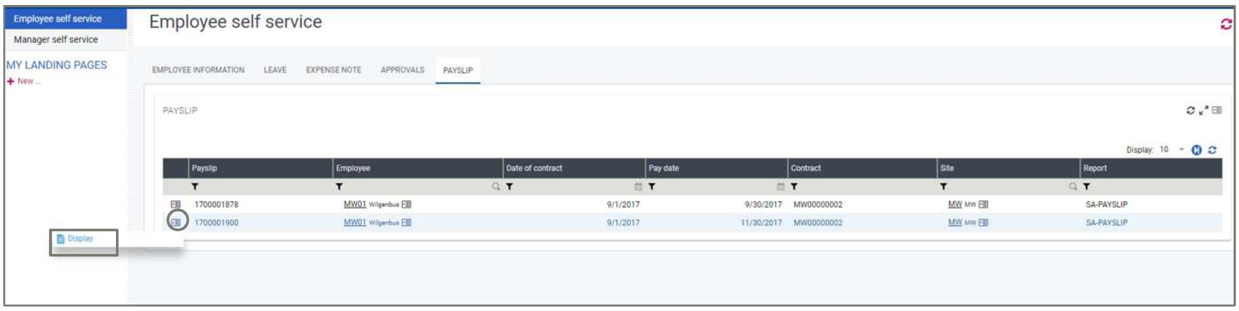


ESS Payslip view

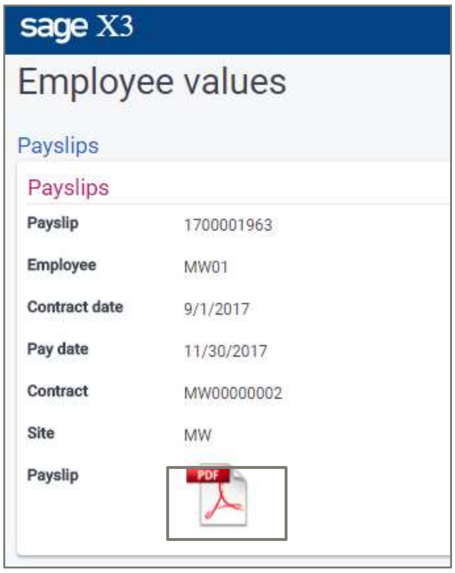
Log into ESS > Payslip and view payslips that have been released through the ESS payslip generation (ESSEMLPAY) function:



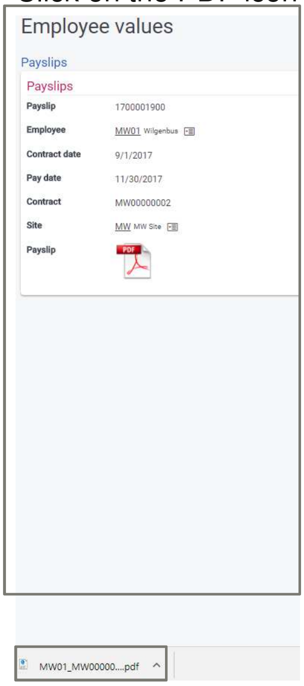
To view a specific payslip, click on the applicable Action button and select Display:



The payslip screen will now be displayed with a short summary of employee details and the payslip will be visible in PDF format:



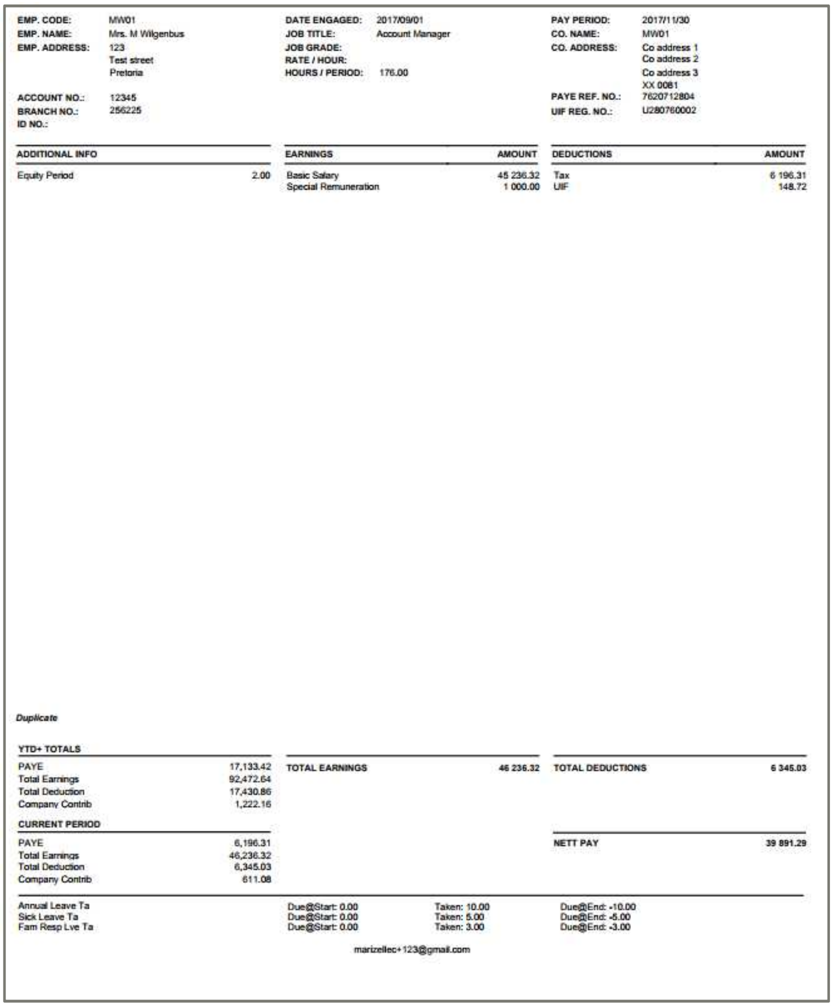
Click on the PDF icon to download the payslip for viewing:



Click on the downloaded file as shown above to open the payslip.

Alternatively, navigate to My Documents > Downloads to open the payslip.

All the info added on the different tabs during payslip creation will now be visible on the payslip:



EMP. CODE:	MW01	DATE ENGAGED:	2017/09/01	PAY PERIOD:	2017/11/30
EMP. NAME:	Mrs. M Wilgenbus	JOB TITLE:	Account Manager	CO. NAME:	MW01
EMP. ADDRESS:	123 Test street Pretoria	JOB GRADE: RATE / HOUR: HOURS / PERIOD:	 176.00	CO. ADDRESS:	Co address 1 Co address 2 Co address 3 XX 0081
ACCOUNT NO.:	12345			PAYE REF. NO.:	7620712804
BRANCH NO.:	256225			UIF REG. NO.:	U280760002
ID NO.:					

ADDITIONAL INFO		EARNINGS	AMOUNT	DEDUCTIONS	AMOUNT
Equity Period	2.00	Basic Salary	45 236.32	Tax	6 196.31
		Special Remuneration	1 000.00	UIF	148.72

Duplicate

YTD+ TOTALS					
PAYE	17,133.42	TOTAL EARNINGS	46 236.32	TOTAL DEDUCTIONS	6 345.03
Total Earnings	92,472.64				
Total Deduction	17,430.86				
Company Contrib	1,222.16				
CURRENT PERIOD					
PAYE	6,196.31			NETT PAY	39 891.29
Total Earnings	46,236.32				
Total Deduction	6,345.03				
Company Contrib	611.08				

Annual Leave Ta	Due@Start: 0.00	Taken: 10.00	Due@End: -10.00
Sick Leave Ta	Due@Start: 0.00	Taken: 5.00	Due@End: -5.00
Fam Resp Lve Ta	Due@Start: 0.00	Taken: 3.00	Due@End: -3.00

marizellec+123@gmail.com

It is important to note the following scenarios with regards to payslip viewing on ESS.
A payslip will not be visible in ESS if:

- The payslip status is "*Entered"* in Sage Enterprise Management Payroll (GESVEP).
- The payslip has been calculated and printed in Sage Enterprise Management Payroll but not released to ESS through the ESSEMLPAY function. This will only create a payslip record but with no attachment.
- Changes have been made to an already released payslip, calculated, printed but not yet released through the ESSEMLPAY function.

Process

Steps for viewing ESS payslips:

1. Payslips are created in Sage Enterprise Management Payroll from GESVEP (Employee payslips).
2. Once all the variables have been added on the different tabs, the payslip needs to be calculated.
3. Function ESSEMLPAY is used to release a calculated payslip to ESS. Using the ESSEMLPAY function for a calculated payslip will automatically update the payslip status to "Printed".
4. A payslip that has been calculated and printed will not automatically display in ESS. The ESSEMLPAY function still needs to be used to release the payslip to ESS. The record will be visible in ESS but there will not be an attachment.
5. Different criteria can be selected to release payslips to ESS.
6. If a released payslip is deleted in the Sage Enterprise Management Payroll system, it will clear in ESS.

MSS – Manager self service

Purpose

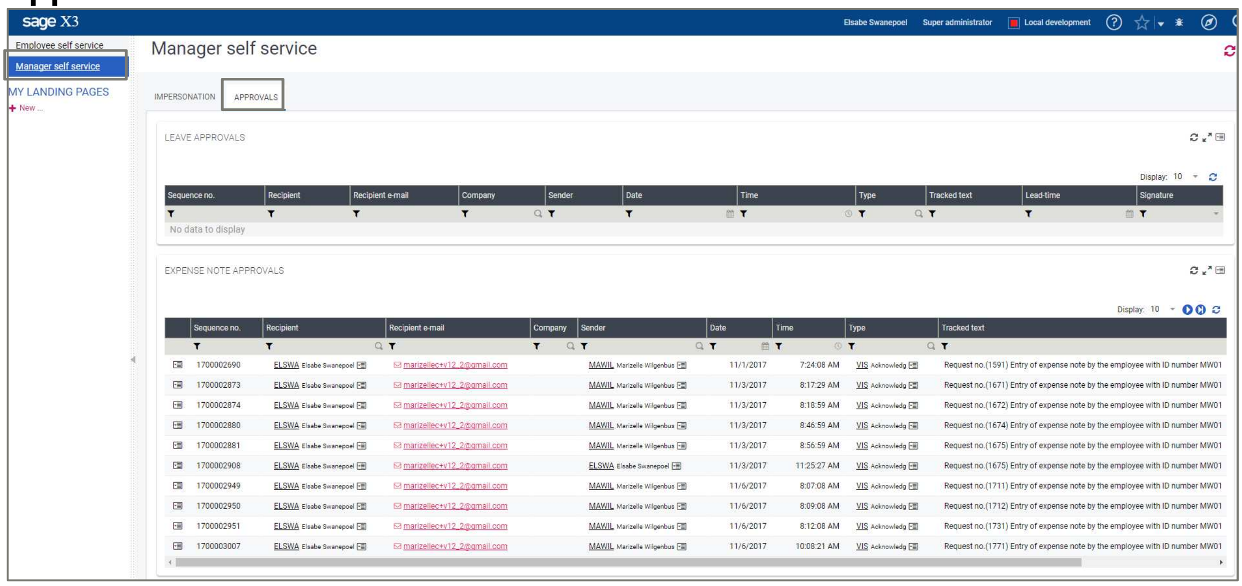
- A manager of an employee should be able to act as an employee (i.e impersonate an employee), from his/her own profile.
- Leave and expense notes transactions can be submitted on behalf of the employee.
- The manager can approve any transactions awaiting approval.
- The usual expected ESS workflow will apply for any impersonations done.
- The employee's ESS record is updated accordingly after approval.
- The manager can also view any pending approvals from this page (i.e. simulates the approvals page from the ESS area).

MSS – Approvals

MSS Approvals is an area where the manager of the employee can action any ESS requests:

- The manager can access all unapproved transactions for his/her employees.
- The manager must be set up as a "Manager" on the employee's Supervisor tab in Sage Enterprise Management Payroll (Employment contract – GESCTR).
- The manager receives a notification on email of a pending transaction.
- The approval status is either "Approved" or "Rejected".
- Approved transactions from ESS should action the changes to Sage Enterprise Management Payroll, e.g. update leave balances, entry of absences, expense notes, employee record changes, etc.
- This tab is also available from the MSS view.

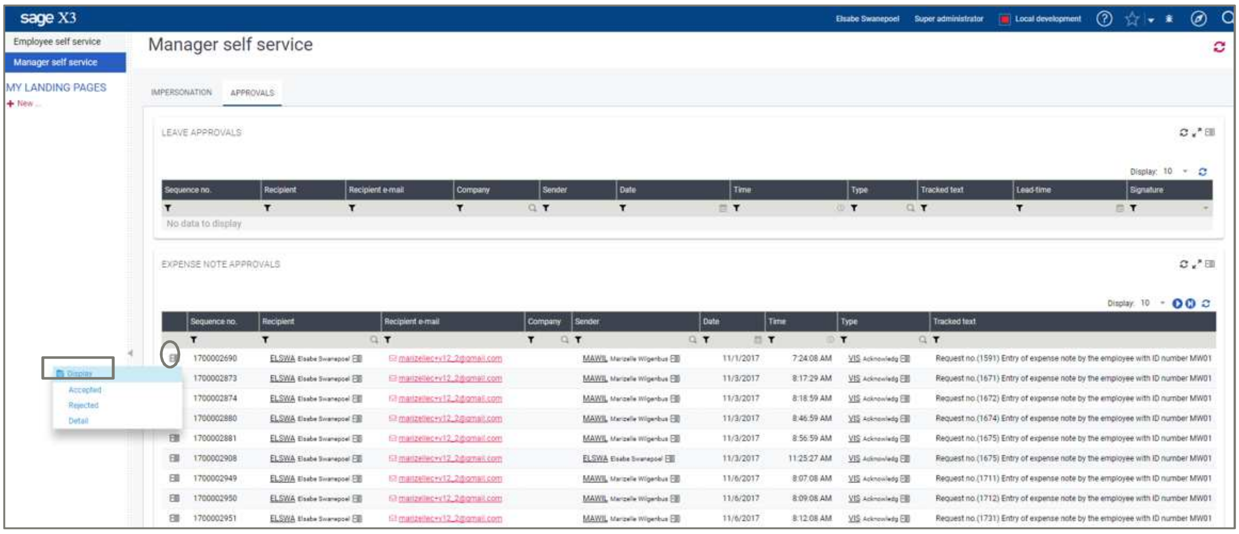
Approvals tab



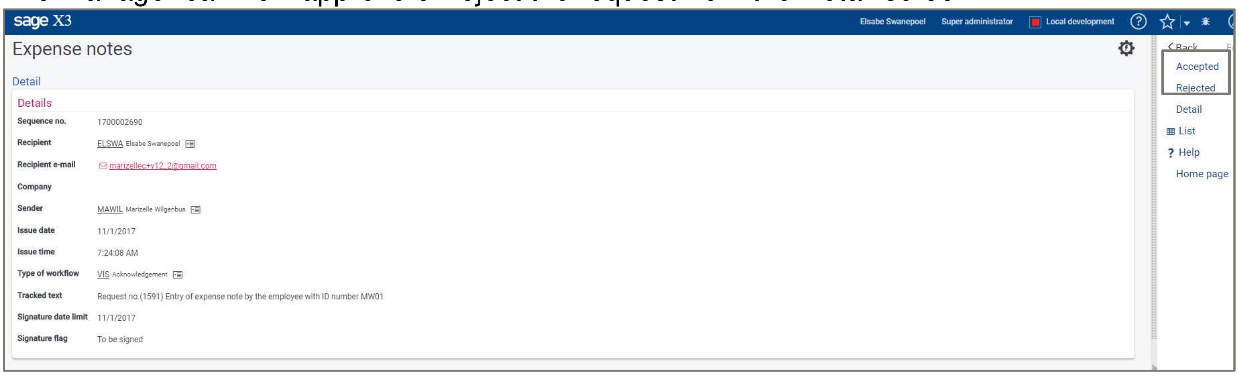
From the Approvals tab, the manager can see pending leave and expense note requests. On the grid view, the manager will have an overview of the following:

- Sender.
- Date.
- Time.
- Type.
- Tracked text (which will display the request number that is also included in the notification email to the manager).

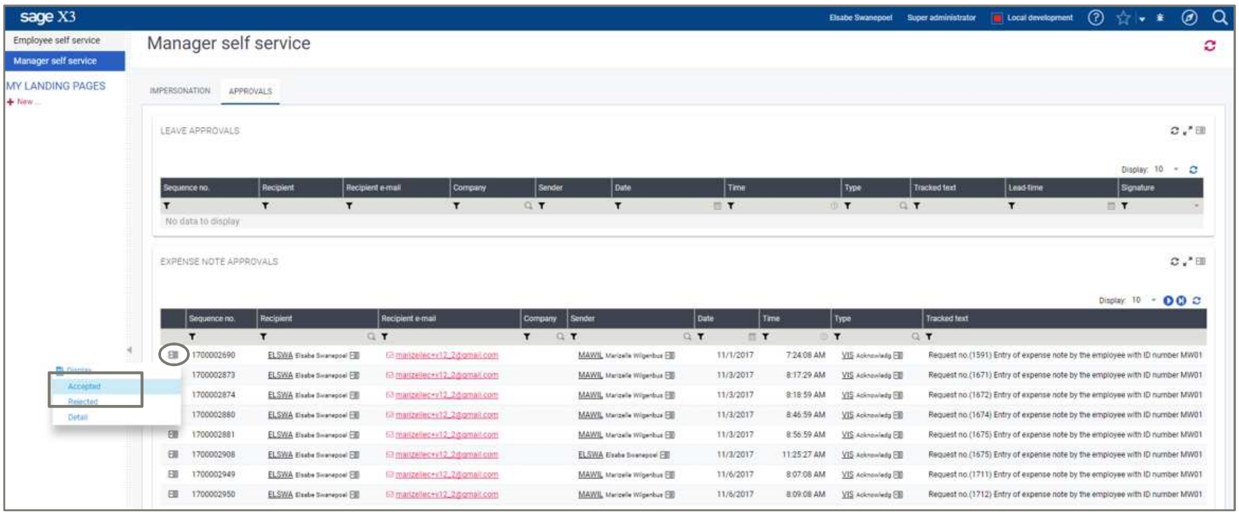
To view the details of a request, the manager can click on the Action button of a request and click on Display:



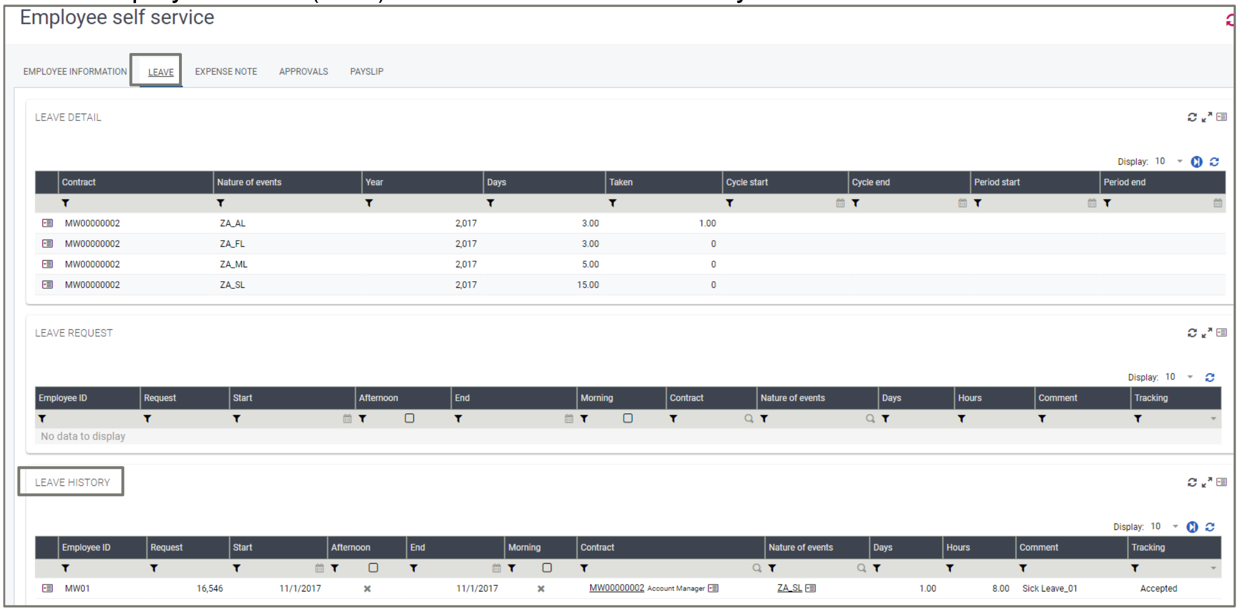
The manager can now approve or reject the request from the Detail screen:



Alternatively, requests can be approved or rejected by clicking on the Action button on the grid view:



If a leave or expense note request is approved, the request status will be updated to "*Accepted*" on the employee's side (ESS) and will move to the history section:

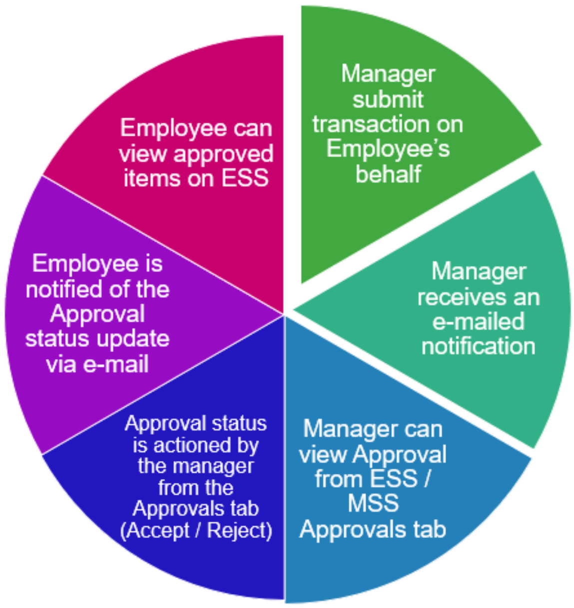


If an employee request is approved, the relevant details will be updated in ESS, as well as in Sage Enterprise Management Payroll (Employee record – GESEML or Employment contract record – GESCTR).

MSS – Impersonations

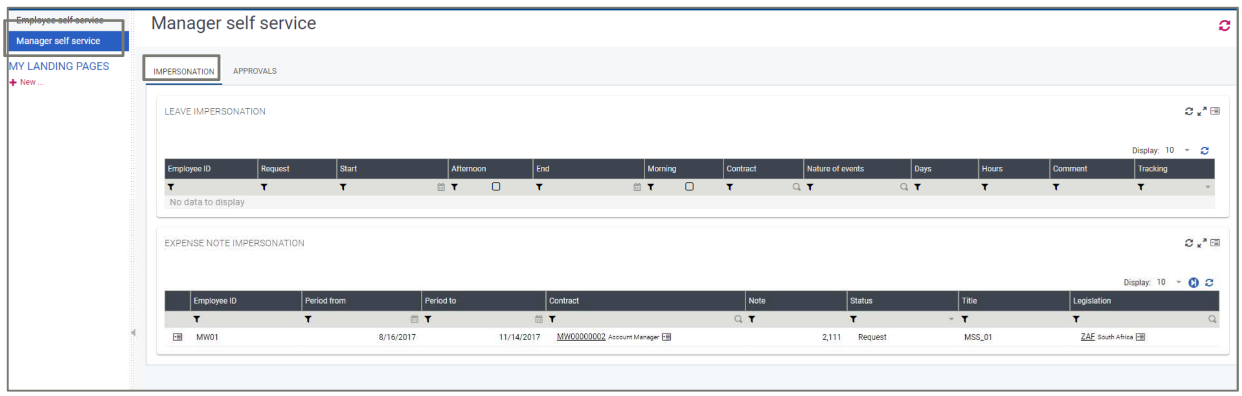
Process flow

MSS uses the same workflow and signature management as for ESS, **except** that the manager impersonates the employee, and can submit the leave or expense note request on the employee's behalf.

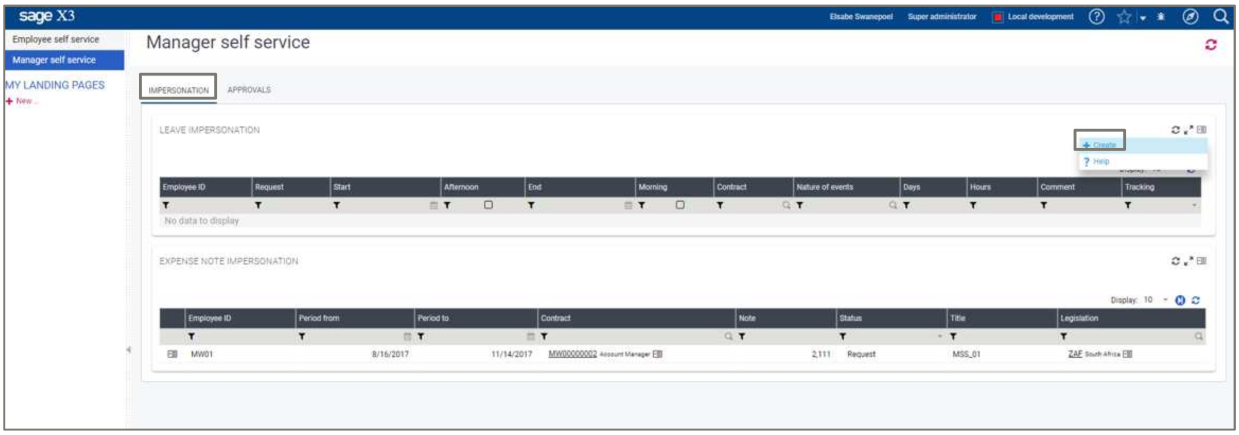


Impersonation process

- The manager navigates to *MSS > Impersonation*:

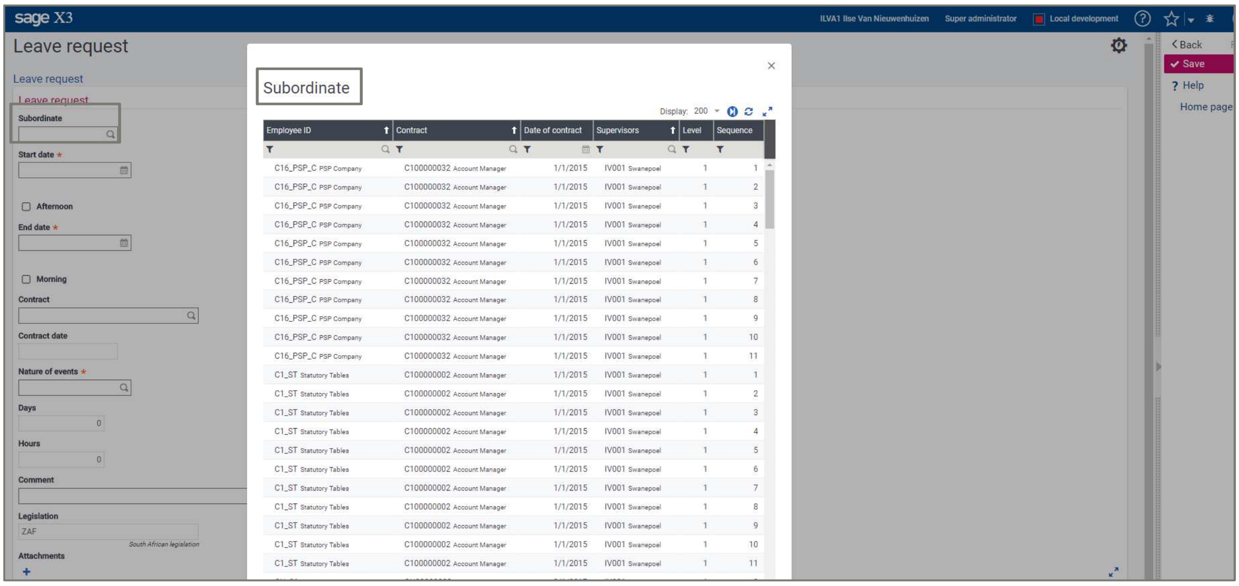


- The manager clicks on the Action button of the relevant impersonation type (i.e. leave or expense note) and selects *Create.*



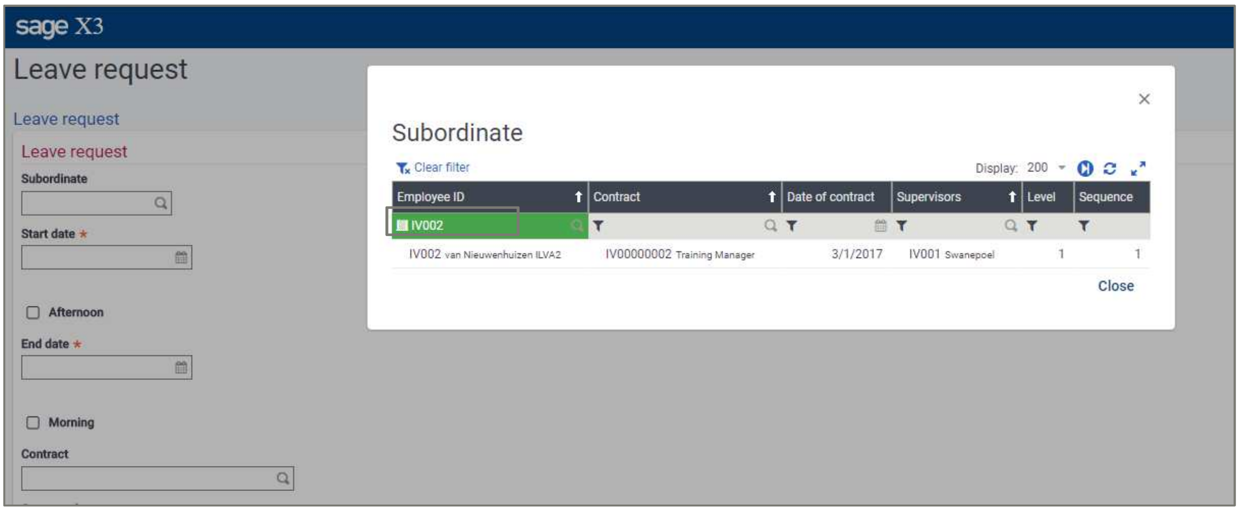
This will open the same Create screen that is seen in ESS, but with additional subordinate and employee fields.

The manager clicks on the Lookup icon in the subordinate field and selects the relevant employee from the lookup list. The lookup list will display all employees that is linked to the manager on the Supervisor tab (Employment contract record – GESCTR):

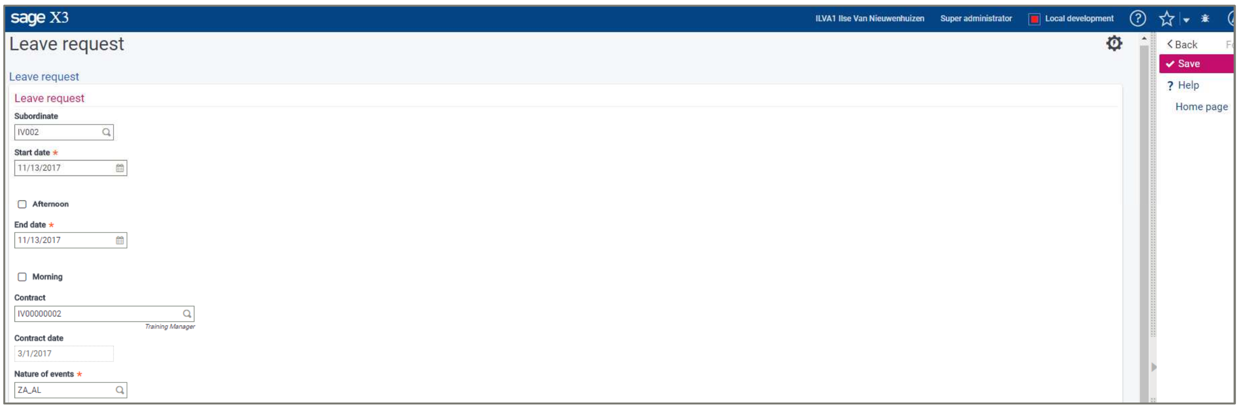


To search for a specific employee, the manager can use one of the many column filters by adding the relevant criteria in the filter fields.

Example of using the employee ID filter:



The manager clicks on the relevant employee which will populate the subordinate field:



Once all the remaining fields have been completed and the request has been saved, the workflow will be kicked off.

Workflow summary

- The manager creates a request on behalf of the employee.
- The manager receives a notification email of the request (as per the ESS workflow).
- The manager will see the request under *MSS > Approvals*.
- The manager will approve or reject the request.
- The employee receives a confirmation email.
- The request is removed from the Approvals screen.

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