



sage X3

Release User Documentation

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

03 2018

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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
03/09/2018	Version 1.2	Edited	Lizane Loots

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.

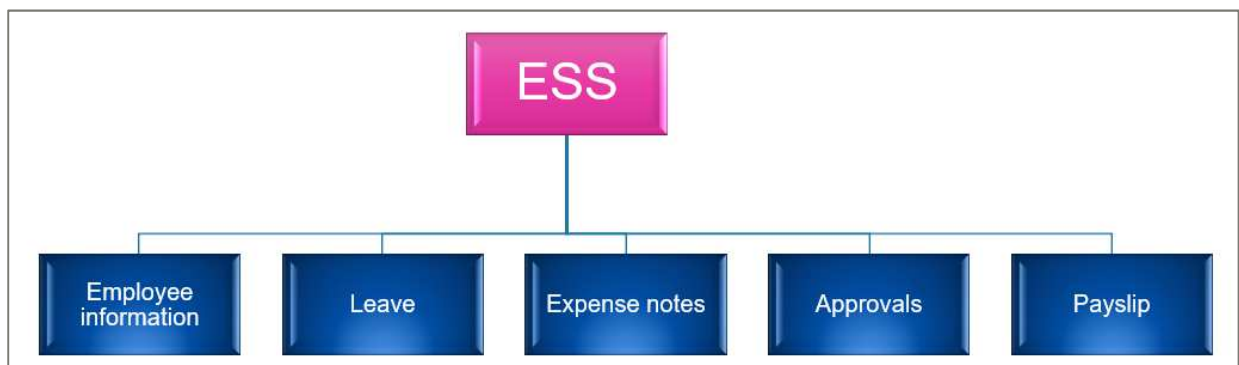
Managers are able to submit requests on behalf of employees and to approve requests through customised workflows.

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

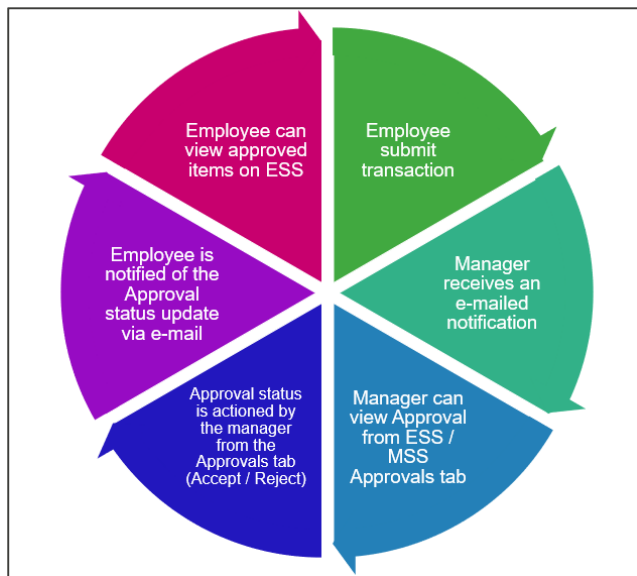
The ESS workflow requires the following areas to be defined:

- **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



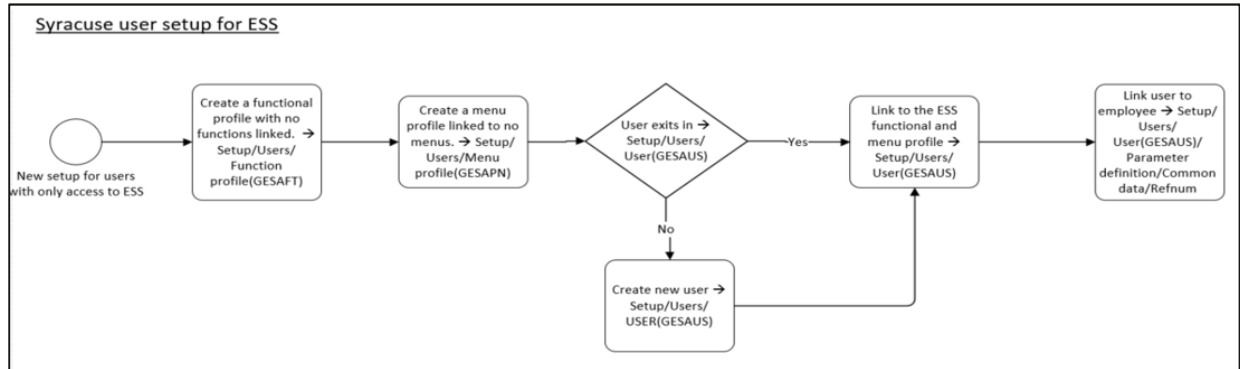
A typical ESS process flow consists of the following:

- 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.

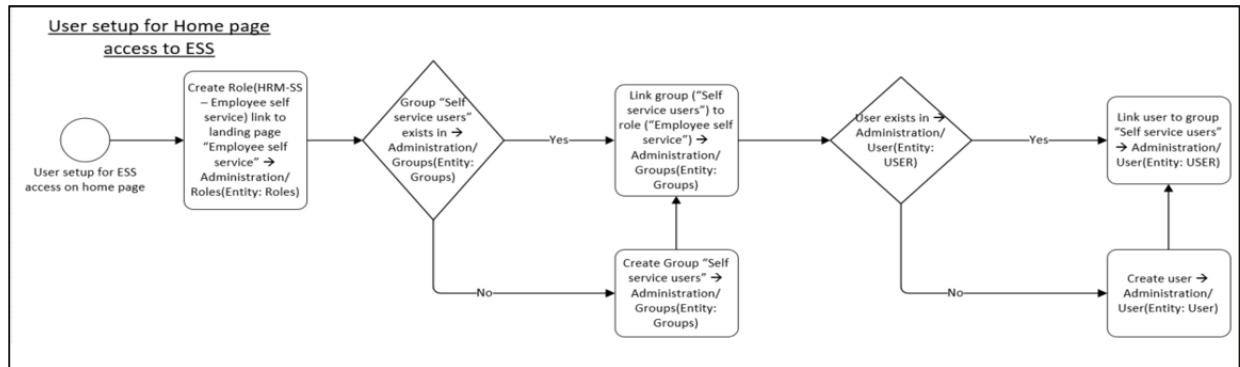
ESS – Setup users

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)

The screenshot shows the Sage X3 interface for creating a function profile. The left sidebar lists various profile codes, with 'ESS' highlighted and labeled 'ESS Only'. The main form area is titled 'Function profile' and contains fields for 'Profile code' (ESS) and 'Description' (ESS Only). Below the form, there are checkboxes for 'All authorized functions', 'Fixed dashboard', and 'All access codes'. A table below these checkboxes has columns for 'Access code', 'Description', 'Inquiry', 'Modifi...', and 'Execu...'. The right sidebar contains a 'Close page' button, a 'New' button, and a list of actions: 'Save', 'Create', 'Delete', 'Cancel', 'Authorizations', and 'Copy'. Below these are 'Options' (Access code update), 'Selection', 'Utilities', and 'Help'.

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 VALEMPRESS. (Access to this function is needed to view payslips).

Creating a new menu profile

Access: Setup > Users > Menu profile (GESAPN)

The screenshot shows the Sage X3 interface for creating a menu profile. The left sidebar lists various profile codes, with 'ESS' highlighted and labeled 'ESS'. The main form area is titled 'Menu profile' and contains fields for 'Menu profile' (ESS) and 'Description' (ESS). Below the form, there are sections for 'Characteristics' (Profile type: Normal, Start menu: PAPTL, Additional memory: 0) and 'Menu' (Visualized menu: PAPTL, Starting Menu, Current line: Starting Menu). A section titled 'Menu Profile ESS : (Complete)' shows a tree view with 'Expand all', 'Starting Menu', and 'Dashboard views'. The right sidebar contains a 'Close page' button, a 'New' button, and a list of actions: 'Save', 'Create', 'Delete', 'Cancel', 'Copy', and 'Function profile'. Below these are 'Selection', 'Utilities', and 'Help'.

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 (GESAU)

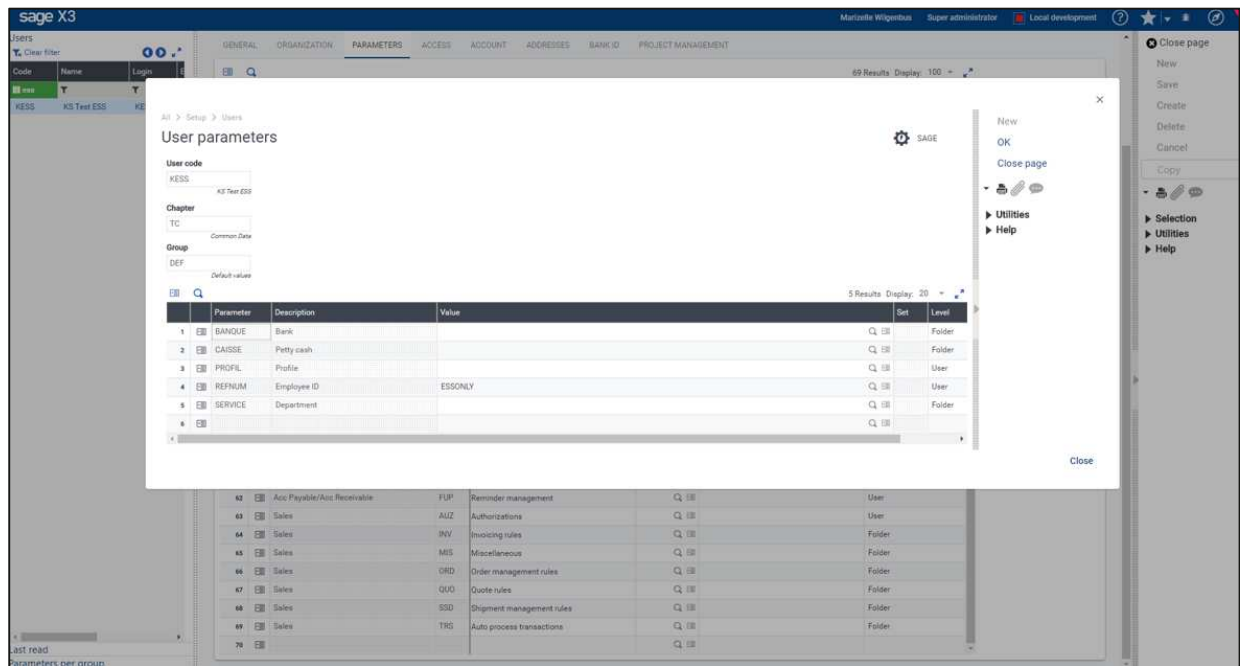
The screenshot shows the Sage X3 Users management interface. The 'Users' form is open, displaying various configuration options for a new user. The 'Code' field is set to 'KESS', the 'Name' field is 'KS Test ESS', and the 'Login' field is 'KESS'. The 'Menu profile' is set to 'ESS'. The 'Function profile' is set to 'ESS'. The 'Web services connection' is checked. The 'Default warehouse' is set to 'ESS'. The 'Workflow email address' is 'chrlize+ESS@my@gmail.com'. The 'Access' field is set to 'ESS'. The 'User destinations' field is set to 'ESS'. The 'Default destinations' table shows 5 rows: 1 Normal, 2 Fax, 3 Thermal, 4 Color, 5. The 'Last read' and 'Parameters per group' are visible at the bottom left.

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 (GESAU)



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)

The screenshot shows the 'Role Employee Self Service' configuration page in Sage X3. The page has a blue header with 'sage X3' and a breadcrumb trail: 'All > Administration > Administration > Users'. Below the header, the title 'Role Employee Self Service' is displayed, followed by a subtitle 'Roles allows personalized configurations for users'. The page is divided into two main sections: 'Information' and 'Administration'. The 'Information' section contains three input fields: 'Code *' with the value 'HRM-SS', 'Description *' with the value 'Employee Self Service', and 'Factory Owner' with the value 'SAGE'. The 'Administration' section contains several sub-sections: 'Groups' with a search icon, 'Badges' with a search icon and the value 'HRMSS', 'Security profile *' with a search icon and the value 'User', 'Navigation page' with a search icon, 'Landing pages' with two search icons and the values 'Employee self service' and 'Manager self service', and 'Business Objects Profiles' with a search icon and a table showing 'BoServer' and 'Profile'. The 'Mobile applications' section is at the bottom with a search icon.

sage X3

All > Administration > Administration > Users

Role Employee Self Service

Roles allows personalized configurations for users

Information

Code *
HRM-SS

Description *
Employee Self Service

Factory Owner
SAGE

Administration

Groups

Badges
HRMSS

Security profile *
User

Navigation page

Landing pages
Employee self service Manager self service

Business Objects Profiles

BoServer	Profile
No data to display	

Mobile applications

- 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)

The screenshot shows the 'Group ESS users' configuration page in the Sage X3 interface. The page has a blue header with the 'sage X3' logo and a breadcrumb trail: 'All > Administration > Administration > Users'. Below the header, the title 'Group ESS users' is displayed, followed by a subtitle: 'Access administration, groups associate users with roles and endpoints'. The page is divided into two main sections: 'Information' and 'Administration'. The 'Information' section contains a 'Description' field with the value 'ESS users'. The 'Administration' section contains several fields: 'Role' (with the value 'ESS'), 'Users' (with a list containing 'KESS' and 'ESS Test'), 'Endpoints' (with a list containing 'Local development'), 'X3 server TAGS' (empty), 'Default X3 endpoint' (empty), and 'LDAP group' (empty). Each field has a search icon and a help icon. The 'Role' field has a description: 'Roles allows personalized configurations for users'. The 'X3 server TAGS' field has a description: 'Tags can be used to prefer some X3 process server defined in X3 solution'. The 'Default X3 endpoint' field has a description: 'Reference endpoint for model browsing'. The 'LDAP group' field has a description: 'LDAP group mapping'.

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)

The screenshot shows the 'ESS Test' user profile page. It is divided into two main sections: 'Login' and 'Information'.

Login Section:

- Login:** A text input field containing 'KESS' and a checked 'Active' checkbox.
- Authentication:** Radio buttons for 'Standard' (selected), 'DB', and 'LDAP'.
- New password:** Two text input fields labeled 'Password' and 'Confirm password'.
- Require password change:** An unchecked checkbox.
- LDAP instance for synchronization:** A text input field with a search icon.

Information Section:

- Title:** Radio buttons for 'Mr' and 'Mrs' (selected).
- First name:** A text input field containing 'ESS'.
- Last name:** A text input field containing 'Test'.
- Email:** A text input field.
- CTI id:** A text input field.
- Photo:** A section with a 'Drop file from explorer or Select it' prompt and a 'Select file' button.

The screenshot shows the 'Administration' page with several sections for user management:

- Groups:** A search bar and a list of groups including 'ESS users'.
- Endpoints login:** A table with columns 'Endpoint', 'User login', and 'X3 User code'. It shows 'No data to display'.
- Salesforce Organizations:** A table with columns 'OAuth2 Username' and 'OAuth2 Servers'. It shows 'No data to display'.
- Profiles BO:** A table with columns 'Security', 'User', 'Password', and 'BO Server'. It shows 'No data to display'.
- Connection information for V6:** An unchecked checkbox.
- Right sidebar:** A list of roles: 'Teams administrator', 'Teams author', 'Teams member', and 'Teams member'.

- 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.

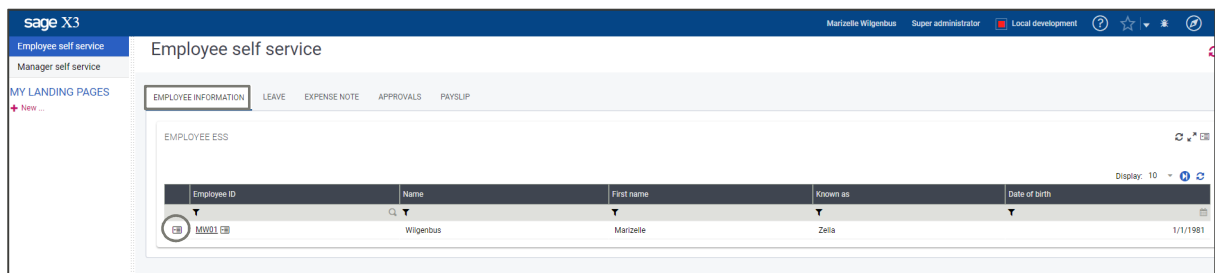
Employee home screen

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

CIVIL STATUS | ADDITIONAL | BANKING INFORMATION | CHILDREN

Employee

Employee's family name
Wolgentbus

Employee's first name
Mariska

Country of birth
ZA

Telephone
126550000

Fax

E-mail
mariskec+123@gmail.com

Date of birth
1/1/1981

Mobile phone

Known as
Zelle

Persons to contact

	Relationship type	Contact name	First name	Mobile phone	E-mail	Telephone
1	Mariska	de Beer		785215212	mariska@gmail.com	125211122

Spouse

	Marital status	Spouse's registrati...	Spouse's name	Spouse's first name	Spouse's birth ...	Coun...	Telephone
1	Single						

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

CIVIL STATUS | **ADDITIONAL** | BANKING INFORMATION | CHILDREN

Additional RSA fields

RSA ID number

Second name

Maiden name

Passport

	Country	Number	Date
1	ZA	gdfg1545454shdh	10/17/2023

Addresses

	P...	Type	Service type	Unit/postal ...	Post office name	Postal agency / sub unit na...	C...	Care of intermediary	Complex	Street num...	Street
1	2	Postal	Postal office box	2468	Test Office	Olympus					
2	1	Residential								123	test
3	3	Work								222	work test

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

Payment type	Payment method	Bank	Beneficiary	Coun.	Account numb.	IB...	Bank ID number	Curre.	N...	BIC code	Bank account type	Bank...	Account relationship	P...
1	NP	ZA2	FNB	Wilgenbus Marizelle	ZA	123456789	12345	ZAR		123	Cheque/current account	256,225	Own account	101

Banking information can be viewed from this tab.

Employees will not be able to add or modify banking details.

Employee information: Children

Child's name	Child's first name	Child's gender	Child's birth	Child comment	
1	Wilgenbus	Lieske	Female	1/1/2015	child1
2	Wilgenbus	Pietie	Rather not say	2/2/2010	child2

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 (GESDNE):
 - 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:

The screenshot displays the 'Employee self service' interface. At the top, there are tabs for 'EMPLOYEE INFORMATION', 'LEAVE', 'EXPENSE NOTE', 'APPROVALS', and 'PAYSUP'. The 'LEAVE' tab is selected. Below the tabs, there are three main sections: 'LEAVE DETAIL', 'LEAVE REQUEST', and 'LEAVE HISTORY'. The 'LEAVE DETAIL' section shows a table with columns: Contract, Nature of events, Year, Days, Taken, Cycle start, Cycle end, Period start, and Period end. It lists four rows of leave data for contract MIV00000002. The 'LEAVE REQUEST' section shows a table with columns: Employee ID, Request, Start, Afternoon, End, Morning, Contract, Nature of events, Days, Hours, Comment, and Tracking. It shows one request for employee MIV01. The 'LEAVE HISTORY' section is currently empty.

Contract	Nature of events	Year	Days	Taken	Cycle start	Cycle end	Period start	Period end
MIV00000002	ZA_AL	2017		3.00	1.00			
MIV00000002	ZA_FL	2017		3.00	0			
MIV00000002	ZA_ML	2017		5.00	0			
MIV00000002	ZA_SL	2017		15.00	0			

Employee ID	Request	Start	Afternoon	End	Morning	Contract	Nature of events	Days	Hours	Comment	Tracking
MIV01	16,546	11/1/2017	X			MIV00000002	Account Manager	1.00	8.00	Sick Leave_01	Request

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

Contract	Nature of events	Year	Days	Taken	Cycle start	Cycle end	Period start	Period end
MW000000002	ZA_AL	2017	3.00	1.00				
MW000000002	ZA_FL	2017	3.00	0				
MW000000002	ZA_ML	2017	5.00	0				
MW000000002	ZA_SL	2017	15.00	0				

- Click on *Create/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:

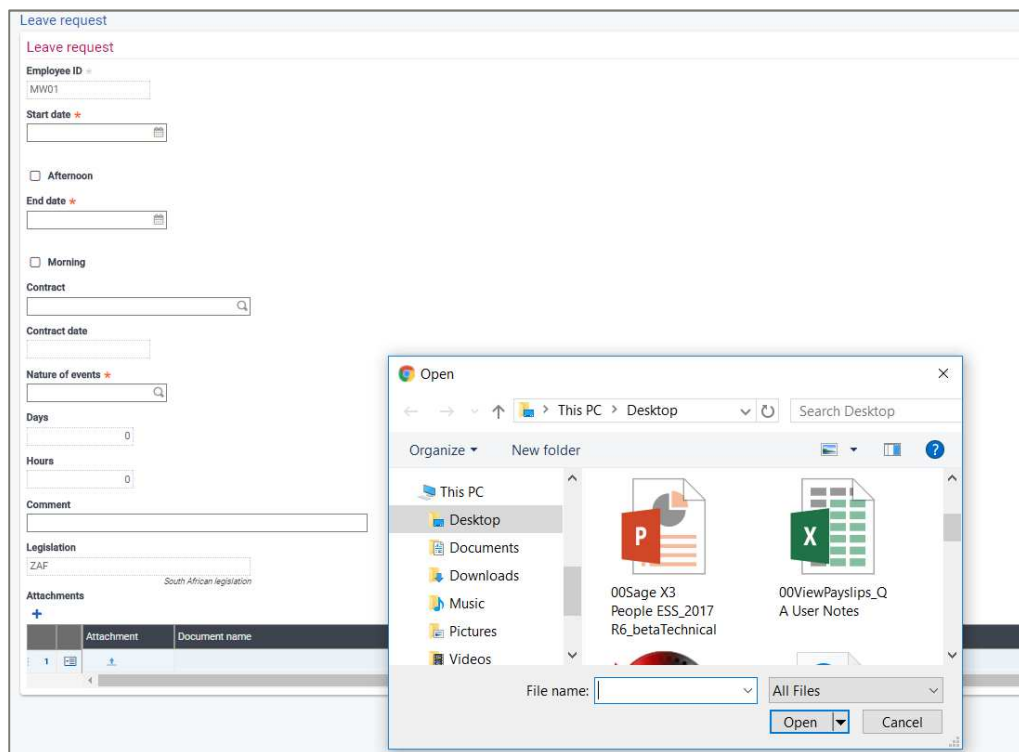
- MS Excel.
- PDF.
- Jpeg.
- MS Word.
- RTF.

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

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

The screenshot shows the 'Leave request' form. The 'Attachments' section at the bottom has a plus icon in a circle to its left. Below the plus icon is a table with two columns: 'Attachment' and 'Document name'. The table is currently empty, with the text 'No data to display' below it.

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



Cancel leave request

The screenshot shows the 'Employee self service' interface. The 'LEAVE REQUEST' section is active, displaying a table of leave requests. The table has columns: Employee ID, Request, Start, End, Morning, Contract, Nature of events, Days, Hours, Comment, and Tracking. A 'Cancellation request' button is located in the bottom left corner of the interface.

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

The screenshot shows the 'LEAVE HISTORY' section. The table displays leave history with columns: Employee ID, Request, Start, End, Morning, Contract, Nature of events, Days, Hours, Comment, and Tracking. The 'Tracking' column shows the status 'Accepted'.

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:

LEAVE REQUEST											Display: 10
Employee ID	Request	Start	Afternoon	End	Morning	Contract	Nature of events	Days	Hours	Comment	Tracking
No data to display											
LEAVE HISTORY											Display: 10
Employee ID	Request	Start	Afternoon	End	Morning	Contract	Nature of events	Days	Hours	Comment	Tracking
MW01	16,546	11/1/2017	X	11/1/2017	X	M000000002 Account Manager	CA		1.00	Sick Leave_01	Accepted

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:

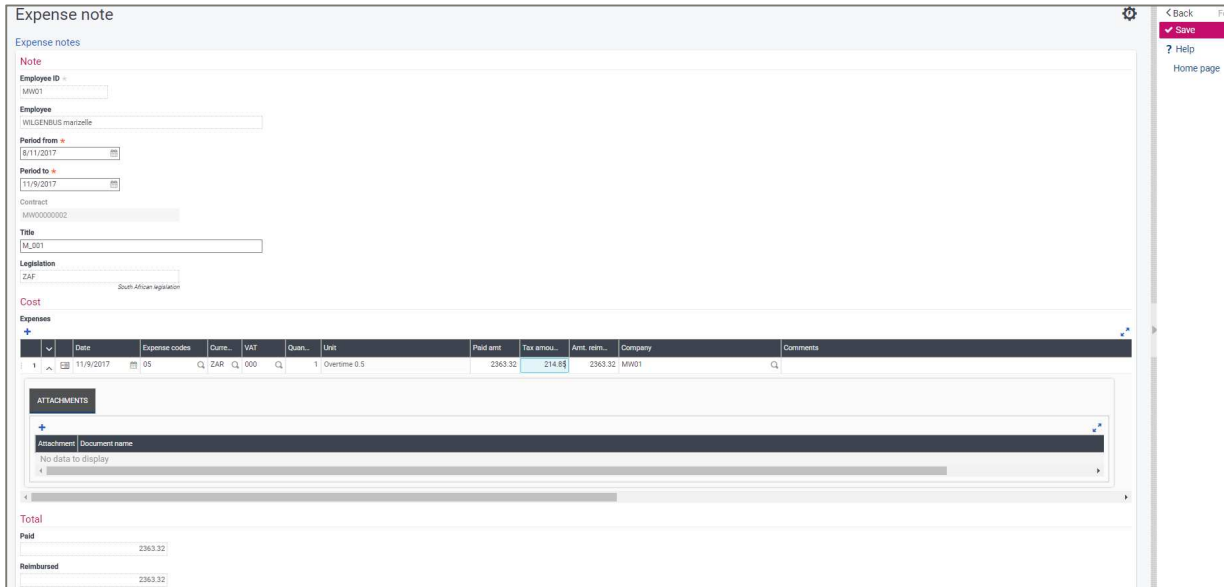
- Log into *Sage Enterprise Management Payroll > ESS > Expense notes* and click on *Create* in the Expense note request section:

The screenshot displays the 'Employee self service' interface. At the top, there are tabs for 'EMPLOYEE INFORMATION', 'LEAVE', 'EXPENSE NOTE' (which is selected), 'APPROVALS', and 'PAYSIP'. Below the tabs, the 'EXPENSE NOTE REQUEST' section is visible, featuring a table with columns: Employee ID, Period from, Period to, Contract, Note, Status, Title, and Legislation. The table lists several requests for employee MW01, with statuses ranging from 'Request' to 'Accepted'. A 'Create' button is visible in the top right corner of this section. Below the 'EXPENSE NOTE REQUEST' section, the 'EXPENSE NOTE HISTORY' section is also visible, showing a table with similar columns, displaying a single record with a status of 'Accepted'.

Employee ID	Period from	Period to	Contract	Note	Status	Title	Legislation
MW01	8/3/2017	11/1/2017	MW00000002 Account Manager		1,591	Request	ZAF South Africa
MW01	8/5/2017	11/3/2017	MW00000002 Account Manager		1,671	Request	ZAF South Africa
MW01	8/5/2017	11/3/2017	MW00000002 Account Manager		1,672	Request	ZAF South Africa
MW01	8/30/2017	11/3/2017	MW00000002 Account Manager		1,674	Request	ZAF South Africa
MW01	8/5/2017	11/3/2017	MW00000002 Account Manager		1,675	Request	ZAF South Africa
MW01	8/5/2017	11/6/2017	MW00000002 Account Manager		1,711	Request	ZAF South Africa
MW01	8/5/2017	11/6/2017	MW00000002 Account Manager		1,712	Request	ZAF South Africa
MW01	8/5/2017	11/6/2017	MW00000002 Account Manager		1,731	Request	ZAF South Africa
MW01	8/8/2017	11/6/2017	MW00000002 Account Manager		1,771	Request	ZAF South Africa
MW01	11/1/2017	11/30/2017	MW00000002 Account Manager		1,811	Request	ZAF South Africa

Employee ID	Period from	Period to	Contract	Note	Status	Title	Legislation
MW01	8/3/2017	11/1/2017	MW00000002 Account Manager		1,592	Accepted	ZAF South Africa

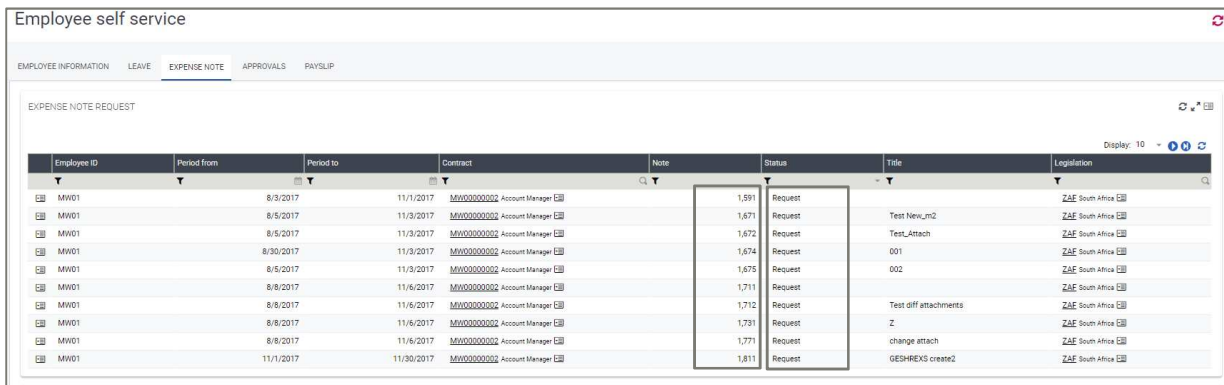
- Click on *Create*. The Expense note capturing screen will be displayed:



The screenshot shows the 'Expense note' capturing screen. It includes fields for 'Note', 'Employee ID' (MW01), 'Employee' (WILGENBUS marcelle), 'Period from' (8/11/2017), 'Period to' (11/9/2017), 'Contract' (MW00000002), 'Title' (MJD01), 'Legislation' (ZAF), and 'Cost'. Below these is a table for 'Expenses' with columns: Date, Expense codes, Curr., VAT, Quan., Unit, Paid amt, Tax amou., Amt. item., Company, and Comments. The table shows one entry for 'Overtime 0.5' with a paid amount of 2363.32 and a tax amount of 214.88. There is also an 'ATTACHMENTS' section with a table for 'Attachments' (Document name) and a 'Total' section showing 'Paid' and 'Reimbursed' amounts of 2363.32.

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:



The screenshot shows the 'Employee self service' interface with the 'EXPENSE NOTE REQUEST' section. It displays a table with columns: Employee ID, Period from, Period to, Contract, Note, Status, Title, and Legislation. The table lists several requests for Employee MW01, all with a status of 'Request'. The requests are for various amounts (1,591 to 1,811) and titles (Test New, Test Attach, 001, 002, Z, change attach, GESHREXS create2).

Employee ID	Period from	Period to	Contract	Note	Status	Title	Legislation
MW01	8/3/2017	11/1/2017	MW00000002 Account Manager	1,591	Request		ZAF South Africa
MW01	8/5/2017	11/3/2017	MW00000002 Account Manager	1,671	Request	Test New, m2	ZAF South Africa
MW01	8/5/2017	11/3/2017	MW00000002 Account Manager	1,672	Request	Test Attach	ZAF South Africa
MW01	8/30/2017	11/3/2017	MW00000002 Account Manager	1,674	Request	001	ZAF South Africa
MW01	8/5/2017	11/3/2017	MW00000002 Account Manager	1,675	Request	002	ZAF South Africa
MW01	8/8/2017	11/6/2017	MW00000002 Account Manager	1,711	Request		ZAF South Africa
MW01	8/8/2017	11/6/2017	MW00000002 Account Manager	1,712	Request	Test diff attachments	ZAF South Africa
MW01	8/8/2017	11/6/2017	MW00000002 Account Manager	1,731	Request	Z	ZAF South Africa
MW01	8/8/2017	11/6/2017	MW00000002 Account Manager	1,771	Request	change attach	ZAF South Africa
MW01	11/1/2017	11/30/2017	MW00000002 Account Manager	1,811	Request	GESHREXS create2	ZAF South Africa

Expense note attachments

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

Examples:

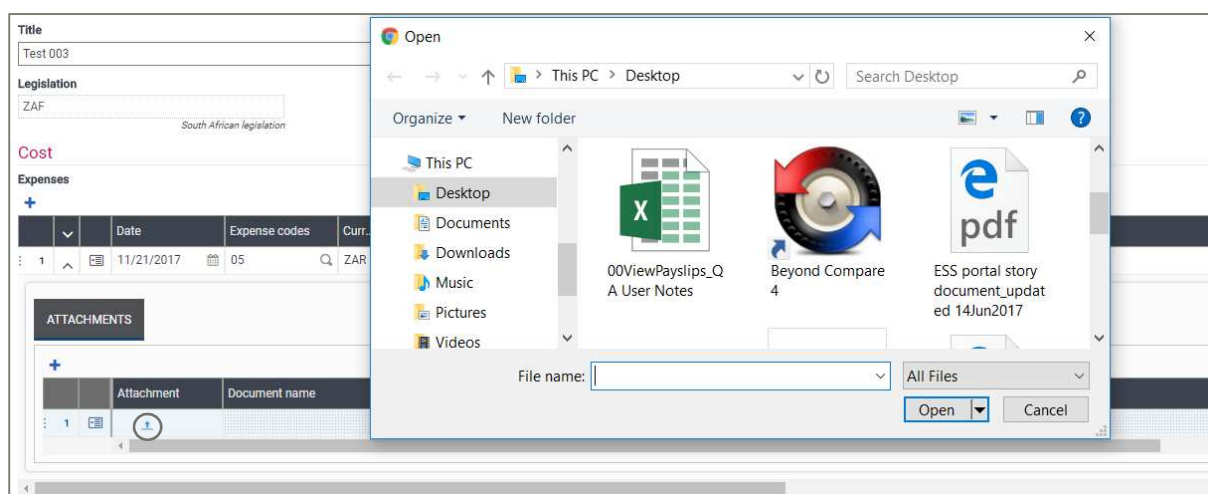
- MS Excel.
- PDF.
- Jpeg.
- MS Word.
- RTF.

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

The screenshot shows the 'Expense notes' form. The 'ATTACHMENTS' section is visible at the bottom, showing a table with columns 'Attachment' and 'Document name'. A plus icon is present to the left of the table header to add new attachments.

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:

EMPLOYEE INFORMATION LEAVE EXPENSE NOTE APPROVALS PAYSIP								
EXPENSE NOTE REQUEST								
Employee ID	Period from	Period to	Contract	Note	Status	Title	Legislation	
MW01	8/3/2017	11/1/2017	MW00000002 Account Manager	1,591	Request	Test New_m2	ZAE South Africa	
MW01	8/5/2017	11/3/2017	MW00000002 Account Manager	1,671	Request	Test New_m2	ZAE South Africa	
MW01	8/5/2017	11/3/2017	MW00000002 Account Manager	1,672	Request	Test_Attach	ZAE South Africa	
MW01	8/30/2017	11/3/2017	MW00000002 Account Manager	1,674	Request	001	ZAE South Africa	
MW01	8/5/2017	11/3/2017	MW00000002 Account Manager	1,675	Request	002	ZAE South Africa	
MW01	8/8/2017	11/5/2017	MW00000002 Account Manager	1,711	Request		ZAE South Africa	
MW01	8/6/2017	11/6/2017	MW00000002 Account Manager	1,712	Request	Test diff attachments	ZAE South Africa	
MW01	8/8/2017	11/6/2017	MW00000002 Account Manager	1,731	Request	Z	ZAE South Africa	
MW01	8/8/2017	11/6/2017	MW00000002 Account Manager	1,771	Request	change attach	ZAE South Africa	
MW01	11/1/2017	11/30/2017	MW00000002 Account Manager	1,811	Request	GE3HREXS create2	ZAE South Africa	
EXPENSE NOTE HISTORY								
Employee ID	Period from	Period to	Contract	Note	Status	Title	Legislation	
MW01	8/3/2017	11/1/2017	MW00000002 Account Manager	1,591	Accepted		ZAE South Africa	
MW01	8/3/2017	11/1/2017	MW00000002 Account Manager	1,591	Accepted	comp select	ZAE South Africa	
MW01	8/5/2017	11/3/2017	MW00000002 Account Manager	1,651	Accepted	Test_New_M	ZAE South Africa	
MW01	8/5/2017	11/3/2017	MW00000002 Account Manager	1,671	Accepted	No Attach test	ZAE South Africa	
MW01	8/5/2017	11/3/2017	MW00000002 Account Manager	1,691	Refused	003	ZAE South Africa	

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

Employee ID	Period from	Period to	Contract	Note	Status	Title	Legislation
MW01	8/3/2017	11/1/2017	MW00000002 Account Manager	1,593	Accepted	comp select	ZAF South Africa
MW01	8/3/2017	11/1/2017	MW00000002 Account Manager	1,593	Accepted	comp select	ZAF South Africa
MW01	8/3/2017	11/1/2017	MW00000002 Account Manager	1,651	Accepted	Test_News_M	ZAF South Africa
MW01	8/5/2017	11/3/2017	MW00000002 Account Manager	1,679	Accepted	No Attach test	ZAF South Africa
MW01	8/5/2017	11/3/2017	MW00000002 Account Manager	1,691	Refused	003	ZAF South Africa
MW01	8/5/2017	11/3/2017	MW00000002 Account Manager	1,692	Accepted	IMP_001	ZAF South Africa
MW01	8/8/2017	11/6/2017	MW00000002 Account Manager	1,751	Accepted	MAX Attach	ZAF South Africa

Details of the expense note will be displayed as follows:

Date	Identifier	Site	Expense cod.	Currency	VAT	Quant.	Unit	Paid amt	Tax amount	Amt. reimbursed	Company	Comments	Signature
11/1/2017	1,553	MW MW	10	ZAR Rand	000 24F Zero	1	Overtime 1.0	2222.00	202.00	2222.00	GESM GHA K8 M	test new comp	ELSWA Elnabe Swamond

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

Payslips will not be visible in ESS unless it has been released through 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:

ESS payslip generation

Criteria

Criteria

☐ All companies

☒ All sites

☒ All departments

☒ All profiles

From employee

MW01

Population

Other criterion

Payroll elements

From payment date

11/01/17

Pay date start

11/01/17

Company

MW01

Site

Legislation

ZAF

Department

Profile

To employee

MW01

To

11/30/17

To

11/30/17

New

OK

Close page

Memo

Recall

Delete memo

Utilities

Help

Close

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

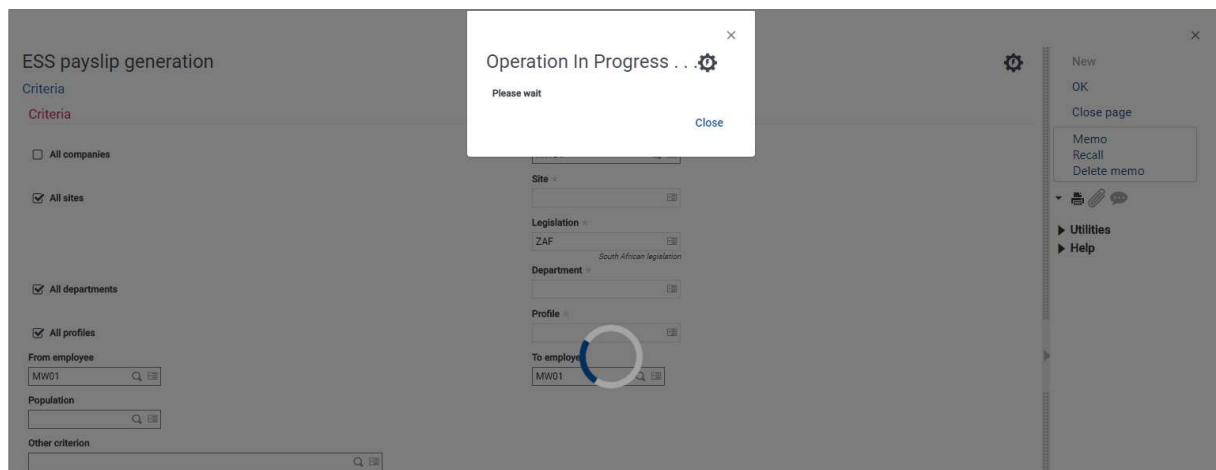
- **All companies:** If selected, the payslips for all companies will be released to ESS for employees to view.
- **Company:** The user can type in a company code or select the applicable company from the Lookup icon. The payslip will only be released for the selected company's employees.
- **All sites:** 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.

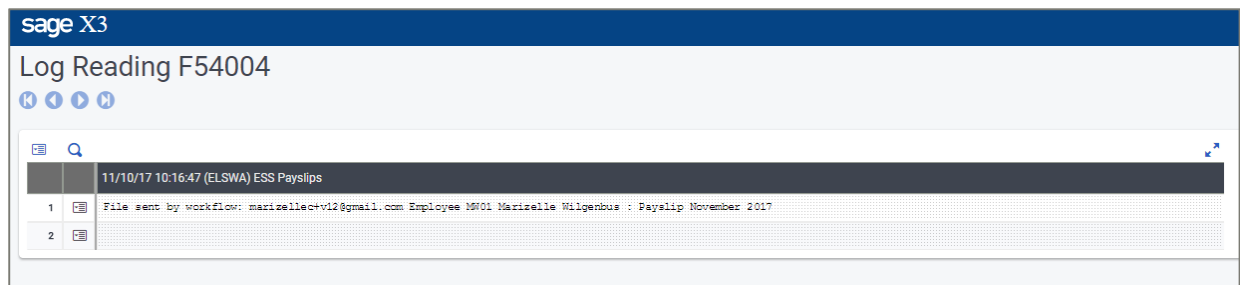
Click on YES when the following message is displayed:

The screenshot shows the 'ESS payslip generation' interface. A modal dialog box titled 'Question' is displayed in the center, asking 'You are about to send payslips to ESS. Do you want to proceed?' with 'YES' and 'NO' buttons. The background interface includes a 'Criteria' section on the left with checkboxes for 'All companies', 'All sites' (checked), 'All departments' (checked), and 'All profiles' (checked). Below these are input fields for 'From employee' (MW01), 'Population', and 'Other criterion'. On the right, there are input fields for 'Company' (MW01), 'Site', 'Legislation' (ZAF, with a note 'South African legislation'), 'Department', 'Profile', 'To employee' (MW01), and 'From employee' (MW01). A sidebar on the far right contains links for 'New', 'OK', 'Close page', 'Memo', 'Recall', 'Delete memo', 'Utilities', and 'Help'.

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

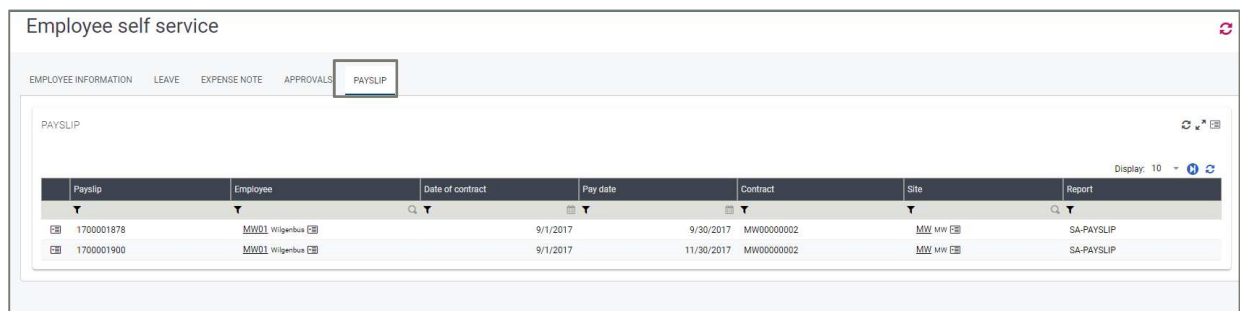


Once the process has been completed the log will indicate which payslips have been released to ESS (this is based on the criteria selected):

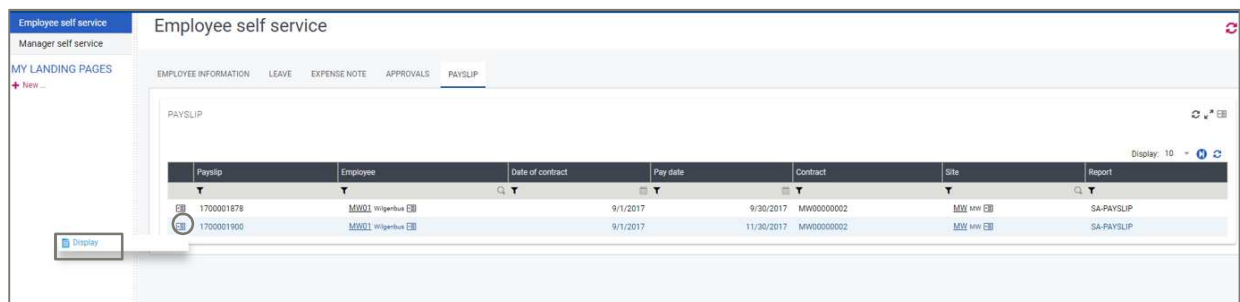


ESS Payslip view

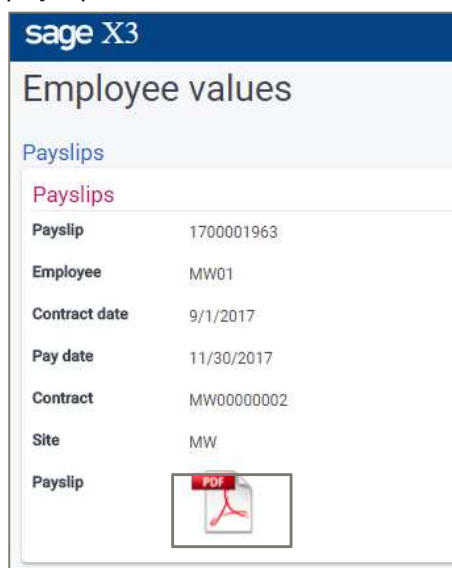
Log into ESS > Payslip and view payslips that have been released through the ESS payslip generation (ESSEMLPAY) function:




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



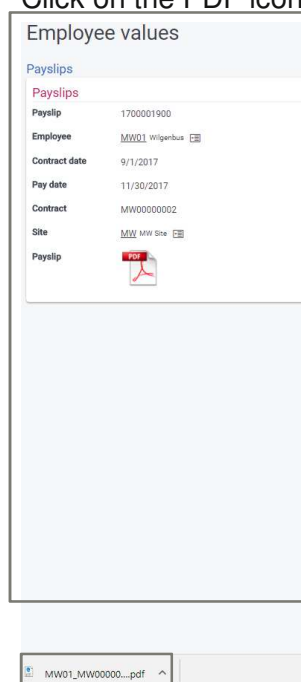
The payslip screen will now be displayed with a short summary of employee details and the payslip will be visible in PDF format:



The screenshot shows the Sage X3 interface with the title 'Employee values'. Under the 'Payslips' section, the following details are listed:

Payslip	1700001963
Employee	MW01
Contract date	9/1/2017
Pay date	11/30/2017
Contract	MW00000002
Site	MW
Payslip	

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



This screenshot shows the same Sage X3 interface, but the PDF icon has been replaced by a download icon. Below the main content area, a file explorer bar shows the downloaded file: 'MW01_MW000000...pdf'.

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:	20170901	PAY PERIOD:	20171130
EMP. NAME:	Mrs. M Wilgenbus	JOB TITLE:	Account Manager	CO. NAME:	MW01
EMP. ADDRESS:	123 Test street Pretoria	JOB GRADE:		CO. ADDRESS:	Co address 1 Co address 2 Co address 3
		RATE / HOUR:		XX 0081	
		HOURS / PERIOD:	176.00	PAYE REF. NO.:	7620712804
ACCOUNT NO.:	12345			UIF REG. NO.:	U280760002
BRANCH NO.:	256225				
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 Earnings	92,472.64	TOTAL DEDUCTIONS	6 345.03
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

The screenshot shows the Sage X3 Manager self service interface. The left sidebar contains 'Employee self service' and 'Manager self service' links. The main content area is titled 'Manager self service' and has tabs for 'IMPERSONATION' and 'APPROVALS'. The 'APPROVALS' tab is active, showing two sections: 'LEAVE APPROVALS' and 'EXPENSE NOTE APPROVALS'. The 'EXPENSE NOTE APPROVALS' section displays a table of pending requests.

Sequence no.	Recipient	Recipient e-mail	Company	Sender	Date	Time	Type	Tracked text
1700002690	ELSWA Elsabe Swanepoel	marzellec@12.2@gmail.com	MAWIL Marizelle Wigenbus	11/1/2017	7:34:08 AM	VIS Acknowledg	Request no.(1591) Entry of expense note by the employee with ID number MW01	
1700002873	ELSWA Elsabe Swanepoel	marzellec@12.2@gmail.com	MAWIL Marizelle Wigenbus	11/3/2017	8:17:29 AM	VIS Acknowledg	Request no.(1671) Entry of expense note by the employee with ID number MW01	
1700002874	ELSWA Elsabe Swanepoel	marzellec@12.2@gmail.com	MAWIL Marizelle Wigenbus	11/3/2017	8:18:59 AM	VIS Acknowledg	Request no.(1672) Entry of expense note by the employee with ID number MW01	
1700002880	ELSWA Elsabe Swanepoel	marzellec@12.2@gmail.com	MAWIL Marizelle Wigenbus	11/3/2017	8:45:59 AM	VIS Acknowledg	Request no.(1674) Entry of expense note by the employee with ID number MW01	
1700002881	ELSWA Elsabe Swanepoel	marzellec@12.2@gmail.com	MAWIL Marizelle Wigenbus	11/3/2017	8:56:59 AM	VIS Acknowledg	Request no.(1675) Entry of expense note by the employee with ID number MW01	
1700002908	ELSWA Elsabe Swanepoel	marzellec@12.2@gmail.com	ELSWA Elsabe Swanepoel	11/3/2017	11:25:27 AM	VIS Acknowledg	Request no.(1675) Entry of expense note by the employee with ID number MW01	
1700002949	ELSWA Elsabe Swanepoel	marzellec@12.2@gmail.com	MAWIL Marizelle Wigenbus	11/5/2017	8:07:08 AM	VIS Acknowledg	Request no.(1711) Entry of expense note by the employee with ID number MW01	
1700002950	ELSWA Elsabe Swanepoel	marzellec@12.2@gmail.com	MAWIL Marizelle Wigenbus	11/5/2017	8:09:08 AM	VIS Acknowledg	Request no.(1712) Entry of expense note by the employee with ID number MW01	
1700002951	ELSWA Elsabe Swanepoel	marzellec@12.2@gmail.com	MAWIL Marizelle Wigenbus	11/5/2017	8:12:08 AM	VIS Acknowledg	Request no.(1731) Entry of expense note by the employee with ID number MW01	
1700003007	ELSWA Elsabe Swanepoel	marzellec@12.2@gmail.com	MAWIL Marizelle Wigenbus	11/5/2017	10:08:21 AM	VIS Acknowledg	Request no.(1771) Entry of expense note by the employee with ID number MW01	

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 screenshot shows the Sage X3 Manager self service interface. The 'EXPENSE NOTE APPROVALS' table contains the following data:

Sequence no.	Recipient	Recipient e-mail	Company	Sender	Date	Time	Type	Tracked text
1700002690	ELSWA Elsie Swanepoel	marizelecv12@gmail.com	MAWIL	Marizelle Wigenbus	11/1/2017	7:24:08 AM	VIS Acknowledgement	Request no (1591) Entry of expense note by the employee with ID number MW01
1700002873	ELSWA Elsie Swanepoel	marizelecv12@gmail.com	MAWIL	Marizelle Wigenbus	11/3/2017	8:17:29 AM	VIS Acknowledgement	Request no (1671) Entry of expense note by the employee with ID number MW01
1700002874	ELSWA Elsie Swanepoel	marizelecv12@gmail.com	MAWIL	Marizelle Wigenbus	11/3/2017	8:18:59 AM	VIS Acknowledgement	Request no (1672) Entry of expense note by the employee with ID number MW01
1700002880	ELSWA Elsie Swanepoel	marizelecv12@gmail.com	MAWIL	Marizelle Wigenbus	11/3/2017	8:46:59 AM	VIS Acknowledgement	Request no (1674) Entry of expense note by the employee with ID number MW01
1700002881	ELSWA Elsie Swanepoel	marizelecv12@gmail.com	MAWIL	Marizelle Wigenbus	11/3/2017	8:56:59 AM	VIS Acknowledgement	Request no (1675) Entry of expense note by the employee with ID number MW01
1700002908	ELSWA Elsie Swanepoel	marizelecv12@gmail.com	ELSWA	Elsie Swanepoel	11/3/2017	11:25:27 AM	VIS Acknowledgement	Request no (1675) Entry of expense note by the employee with ID number MW01
1700002949	ELSWA Elsie Swanepoel	marizelecv12@gmail.com	MAWIL	Marizelle Wigenbus	11/6/2017	8:07:08 AM	VIS Acknowledgement	Request no (1711) Entry of expense note by the employee with ID number MW01
1700002950	ELSWA Elsie Swanepoel	marizelecv12@gmail.com	MAWIL	Marizelle Wigenbus	11/6/2017	8:09:08 AM	VIS Acknowledgement	Request no (1712) Entry of expense note by the employee with ID number MW01
1700002951	ELSWA Elsie Swanepoel	marizelecv12@gmail.com	MAWIL	Marizelle Wigenbus	11/6/2017	8:12:08 AM	VIS Acknowledgement	Request no (1731) Entry of expense note by the employee with ID number MW01

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

The screenshot shows the Sage X3 Expense notes Detail screen. The 'Details' section includes the following information:

- Sequence no.: 1700002690
- Recipient: ELSWA Elsie Swanepoel
- Recipient e-mail: marizelecv12@gmail.com
- Company: MAWIL
- Sender: MAWIL Marizelle Wigenbus
- Issue date: 11/1/2017
- Issue time: 7:24:08 AM
- Type of workflow: VIS Acknowledgement
- Tracked text: Request no (1591) Entry of expense note by the employee with ID number MW01
- Signature date limit: 11/1/2017
- Signature flag: To be signed

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

The screenshot shows the 'Manager self service' interface in Sage X3. The 'APPROVALS' tab is active, displaying two sections: 'LEAVE APPROVALS' and 'EXPENSE NOTE APPROVALS'. The 'EXPENSE NOTE APPROVALS' section contains a table with columns: Sequence no., Recipient, Recipient e-mail, Company, Sender, Date, Time, Type, and Tracked text. A context menu is open over the first row of this table, showing options: Cancel, Accepted, Rejected, and Detail. The table lists several expense note requests, all with a status of 'Acknowledged'.

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:

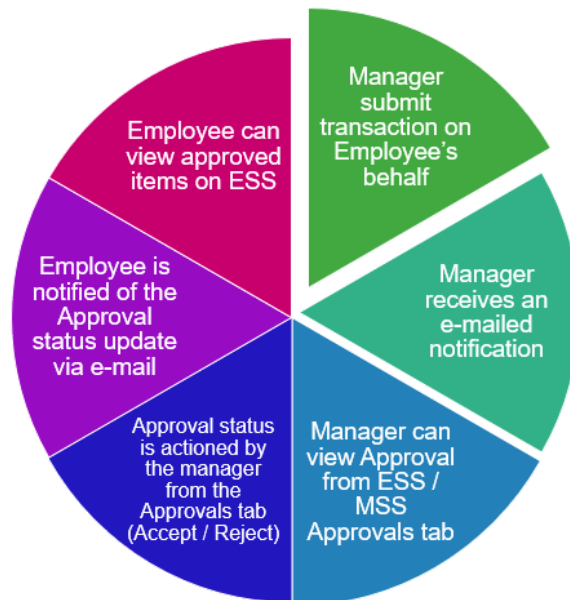
The screenshot shows the 'Employee self service' interface in Sage X3. The 'LEAVE' tab is active, displaying three sections: 'LEAVE DETAIL', 'LEAVE REQUEST', and 'LEAVE HISTORY'. The 'LEAVE DETAIL' section contains a table with columns: Contract, Nature of events, Year, Days, Taken, Cycle start, Cycle end, Period start, and Period end. The 'LEAVE REQUEST' section contains a table with columns: Employee ID, Request, Start, Afternoon, End, Morning, Contract, Nature of events, Days, Hours, Comment, and Tracking. The 'LEAVE HISTORY' section contains a table with the same columns as 'LEAVE REQUEST'. The 'LEAVE HISTORY' table shows a list of leave requests, including one for employee MW01 with a status of 'Accepted'.

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 screenshot displays the 'Manager self service' interface. On the left, there is a sidebar with 'Employee self service' and 'Manager self service' options. The main area is titled 'Manager self service' and contains two tabs: 'IMPERSONATION' and 'APPROVALS'. The 'IMPERSONATION' tab is active, showing two sections: 'LEAVE IMPERSONATION' and 'EXPENSE NOTE IMPERSONATION'. The 'LEAVE IMPERSONATION' section has a table with columns: Employee ID, Request, Start, Afternoon, End, Morning, Contract, Nature of events, Days, Hours, Comment, and Tracking. It shows 'No data to display'. The 'EXPENSE NOTE IMPERSONATION' section has a table with columns: Employee ID, Period from, Period to, Contract, Note, Status, Title, and Legislation. It shows one record for Employee ID MW01, Period from 8/16/2017, Period to 11/14/2017, Contract MW00000002, Note Account Manager, Status 2,111, Title Request, and Legislation MSS_01.

Employee ID	Period from	Period to	Contract	Note	Status	Title	Legislation
MW01	8/16/2017	11/14/2017	MW00000002	Account Manager	2,111	Request	MSS_01

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

The screenshot shows the 'Manager self service' interface in Sage X3. It has two tabs: 'IMPERSONATION' and 'APPROVALS'. Under 'IMPERSONATION', there are two sections: 'LEAVE IMPERSONATION' and 'EXPENSE NOTE IMPERSONATION'. The 'LEAVE IMPERSONATION' section has a 'Create' button. The 'EXPENSE NOTE IMPERSONATION' section shows a table with columns: Employee ID, Period from, Period to, Contract, Note, Status, Title, and Legislation. A row is visible for Employee ID MW01, Period from 8/16/2017, Period to 11/14/2017, Contract MW00000002, Note 2311, Status Request, Title MSS_01, and Legislation ZAF South Africa.

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):

The screenshot shows the 'Leave request' form in Sage X3. A 'Subordinate' lookup window is open, displaying a table of employees. The table has columns: Employee ID, Contract, Date of contract, Supervisors, Level, and Sequence. The table lists 11 employees, all with Contract C100000002 and Supervisors IV001 Swaneepol. The 'Leave request' form in the background has fields for Subordinate, Start date, End date, Contract, Contract date, Nature of events, Days, Hours, Comment, and Legislation.

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 screenshot shows the 'Leave request' form in Sage X3. A 'Subordinate' pop-up window is open, displaying a table of employees. The table has columns: Employee ID, Contract, Date of contract, Supervisors, Level, and Sequence. The first row is highlighted in green.

Employee ID	Contract	Date of contract	Supervisors	Level	Sequence
IV002	IV00000002	3/1/2017	IV001 Swanepoel	1	1

The pop-up window also includes a 'Clear filter' button, a 'Display: 200' dropdown, and a 'Close' button.

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

The screenshot shows the 'Leave request' form in Sage X3. The 'Subordinate' field is now populated with 'IV002'. The 'Contract' field is populated with 'IV00000002' and 'Training Manager'. The 'Contract date' field is populated with '3/1/2017'. The 'Nature of events' field is populated with 'ZA_AL'. The 'Start date' field is populated with '11/13/2017' and the 'End date' field is also populated with '11/13/2017'. The 'Morning' checkbox is selected.

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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