ESS 4.1.4.2

Document Version 1.0

EMPLOYEE MANUAL

TABLE OF CONTENTS

1 ESS PRE-REQUISITES

Before you can start using the Exolvo Self-Service you require the following:

- Access to the ESS website.
- You can access the website using Internet Explorer or from a link on your intranet. If you are accessing the website using Internet Explorer, you require version 6 or later.
- Your ESS username and password.
- Talk to your HR or Payroll department to get a username and password.

2 INTRODUCTION

2.1 What is ESS?

Exolvo Self-Service (ESS) is an information processing and delivery tool that can streamline time-consuming, paper-based procedures. ESS allows you to easily access and manage your personal, payroll, leave, and administrative information online using a standard web browser.

Important: The images in this manual are examples only. The appearance of your ESS pages will depend on how ESS was set up for you.

3 LOGGING ONTO ESS

3.1 Employee Login

Cook Islands Government ESS site:

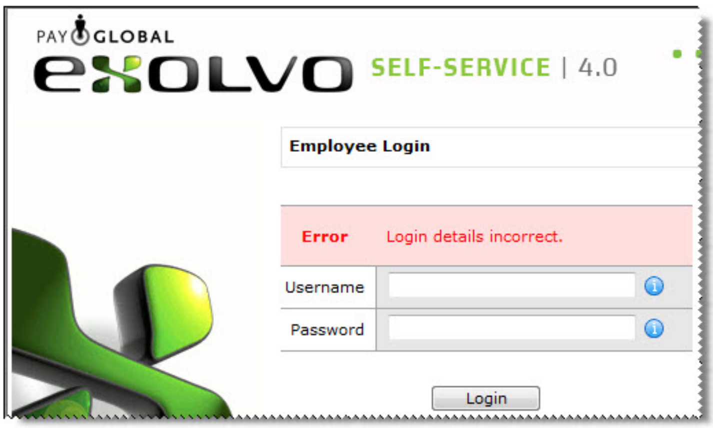
Live	https://payroll.cookislands.gov.ck/ESS
Test	https://payroll.cookislands.gov.ck/ESSTEST

1. When you access ESS, the first page that you will see is *Employee Login*

2. Type your **Username** and **Password**.
3. Click **Login**.

If your username and password are **correct**, then you will go to the home page.

If your username and/or password are **incorrect**, then you will see the following message:



Check the following:

- You have typed your username and password correctly.
- The *Caps Lock* is **not** on.

4 USING ESS

After you log on successfully, you will see the Self-Service home page.

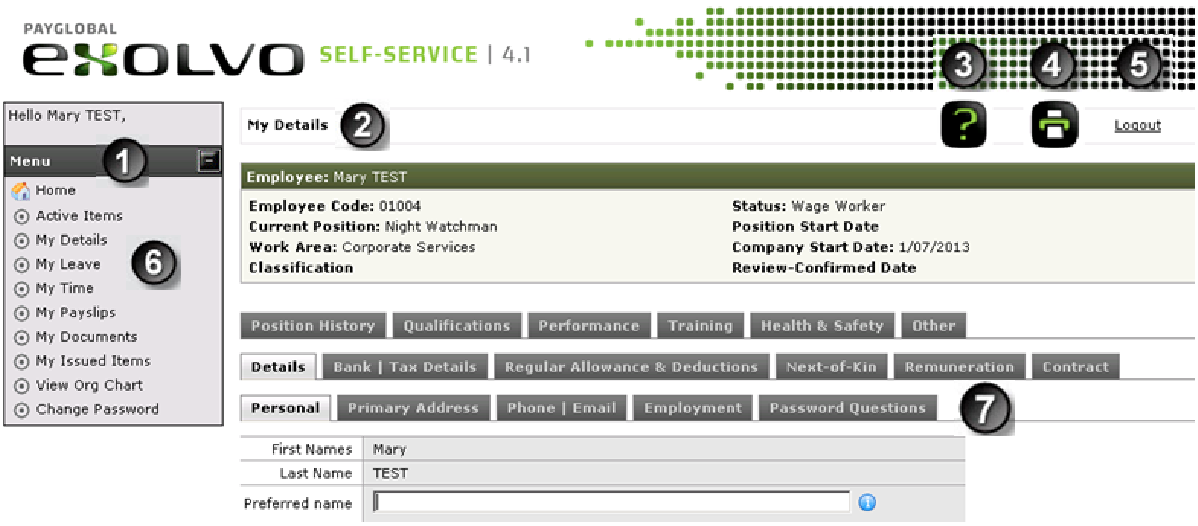
4.1 ESS home page

Your HR or Payroll department configures the home page so that the information displayed is relevant to you. This information can include company news, useful tips, an RSS Feed, or specific promotions

1	You can see the last time that you logged on to ESS to ensure that your account has not been compromised.
2	Home page accordion. This section appears only if you have been assigned other roles or have outstanding action items. The home page accordion is visible in this example because the employee has unread messages. You can click the link to open the action item.

4.2 ESS home page

The following image shows the main navigation features of the Self-Service website.



1	**Minimise menu button** Click this button to hide and show the menu.
2	**Website navigation bar** This navigation bar shows where you are in the website.
3	**Help button** Opens the help file on the page that corresponds to the webpage that you are on.
4	**Print button** Prints the content of the current page. The menu and header will not be printed.
5	**Logout link** The Self-Service website displays confidential information, so you should always complete the logout process before closing your web browser.
6	**Navigation menu** The main menu lists the areas and features that are available in ESS.
7	**Tab page navigation menu** The tab pages that are available in this part of the website.

You should not click your browser's **Back** button while you are using ESS or you may receive the following error:

An Error has Occurred

could not get the configuration for view:

Use the ESS buttons and navigation menu to move around.

4.3 Active Items

Active Items is like an inbox that displays items that are currently in the system, such as leave requests.

Use Active Items to monitor the progress of workflow items that you have submitted. An icon is displayed beside each workflow item to show the status of the item.

The Current tab shows all your active items with the status:

⚠	Action required. You must approve/decline, or action this item.
⌛	In progress. Someone else must approve/decline or action this item.

After the item is approved/declined or actioned by everyone in the workflow, then the item is moved to the History tab.

The History tab shows all your active items with the status:

🏁	Complete

On the *History* tab, you can use the *Time filter* combo box to minimise the number of items that you view, such as "Past month" or "Past 3 months".

Current | History

Time filter: Past month

Type	From	Status	Last actioned	History
Timesheet 1/07/2013 - 7/07/2013	Mary TEST	Approved	Today 06:10 p.m.	History
Leave Request 20/09/2013 - 20/09/2013	Mary TEST	Declined	Today 06:16 p.m.	History
Leave Request 20/09/2013 - 20/09/2013	Mary TEST	Approved	Today 06:18 p.m.	History

- Click on a link in the Type column to display the original request form.

Leave Request Logout

Employee	Mary TEST [01004]
Leave reason	Leave Without Pay [L.LWOP]
Date requested	25/09/2013
Start date	20/09/2013
End date	20/09/2013
Units required	5.00
Type of units	Hours
Additional info	Try again.

Action	Actioned by	Date & time
Submitted	Mary TEST	Today 06:17 p.m.
Approved	HOM TEST	Today 06:18 p.m.

Cancel

- Click on a link in the History column to show actions taken for the request, as shown below.

Active Item History Close

Action	Actioned by	Date & time
Timesheet not submitted	Mary TEST	Today 06:09 p.m.
Timesheet submitted	Mary TEST	Today 06:10 p.m.
Timesheet Final Approval by HOM completed	HOM TEST	Today 06:10 p.m.

The following table explains the options available in *Active items*.

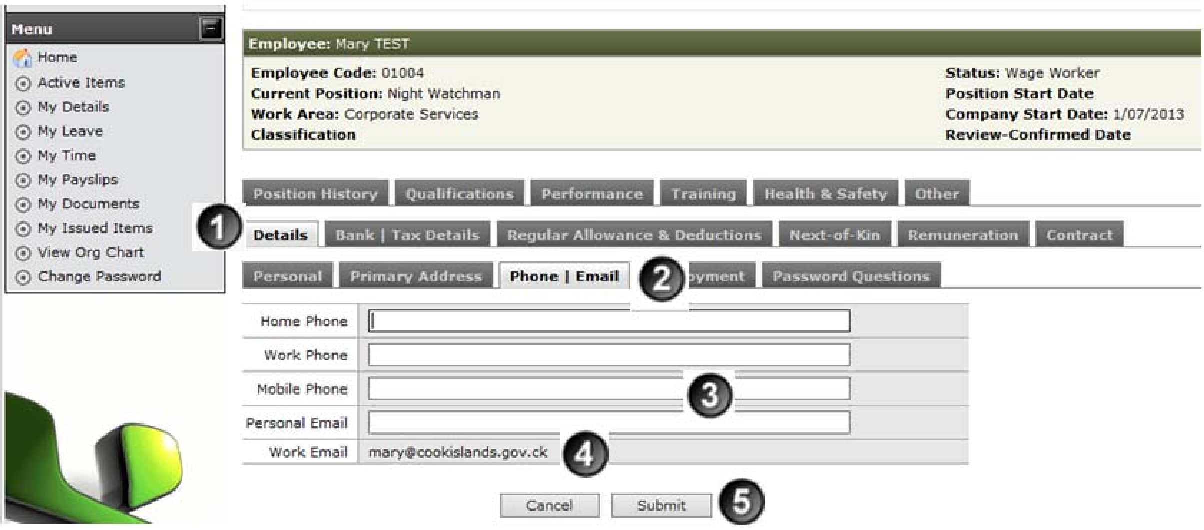
Options	Details
Type	Description of the workflow item.
From	Original creator of the item.
Status	How far an item has progressed through a workflow.
Time	Date and time the item was last stored in the system.
History	Actions that have taken place for the item.

4.4 My Details

The *My Details* tab pages display information from your employee record.

You can update any active field in the **Details** section. Simply edit a field and submit your changes to the database.

Your manager may also have access to this information and be able to view and update selected fields.



1	Current tab page.
2	Current sub-tab page.
3	Text box indicates that the field can be edited.
4	Read-only field.
5	Click *Submit* to save changes directly to the database.

The following example shows how to change your address details.

You are on the *My Details* | *Details* tab.

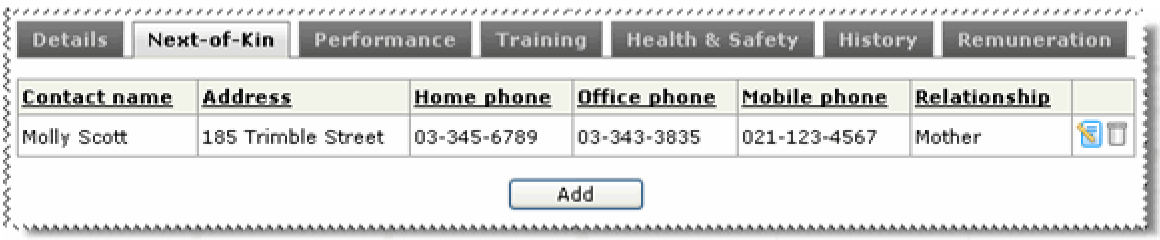
1. Click the **Primary Address** tab.
2. Edit your address details.
3. Click **Submit**.

Note: When you edit your details you must click Submit before you move to another tab page.

Your details are updated immediately — manager approval is not required. However, your manager can update some of your details for you.

4.4.1 Next of Kin

Your next-of-kin details are displayed in a grid. Your manager may also be able to edit this information.



The *Next-of-Kin* tab has the following options.

	Edit details. Click to open the *Next-Of-Kin* form to edit your next-of-kin details.
	Delete. Click to delete a next-of-kin contact. A confirmation message is displayed before the record is deleted.
Add	Click to open the *Next-Of-Kin* form to add a new next-of-kin contact.

4.5 My Leave

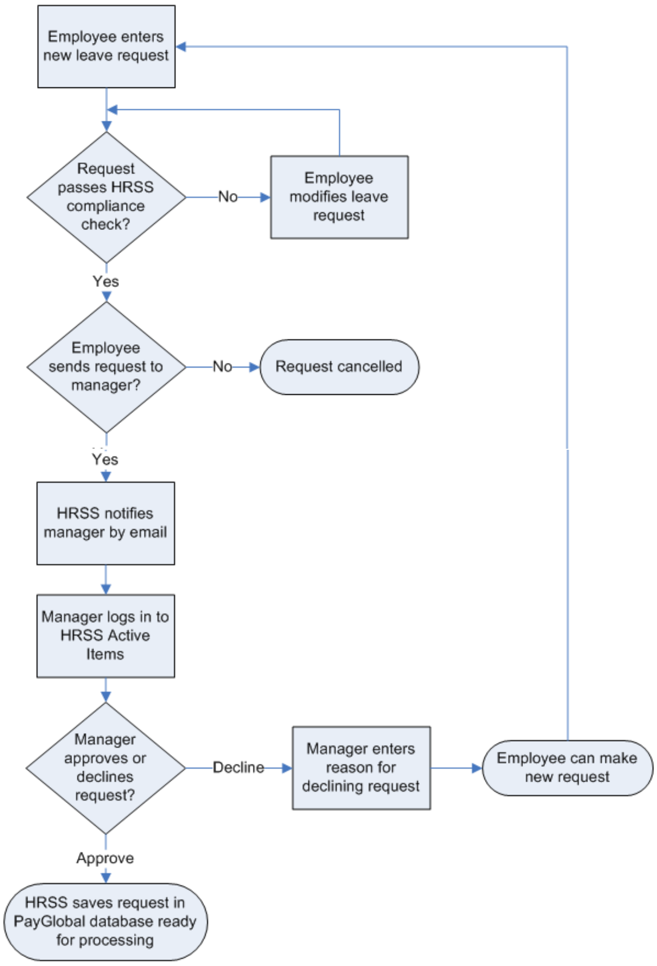
Use the My Leave section to:

- View your leave balances
- Request leave
- Edit or delete your leave request
- View your leave history.

Note: Please refer to the Cook Islands Government Leave Policy for information on leave conditions.

4.5.1 Leave request process

The following process diagram explains the leave request process.



4.5.2 Balances

The *Balances* page displays balances for the leave types that you are entitled to. However, not all your leave types may be displayed. For example, you might not be able to view sick leave.

Leave type	Type of units	Balance (as at close of last pay)	Leave approved not paid	Applied not yet approved
Annual leave	Hours	0.77	0.00	0.00
Sick leave	Hours	0.00	0.00	0.00

The following table explains the *Balances* columns.

Column	Details
Leave type	Type of leave, and the units the balance is displayed in. The units can be Hours, Days, or Weeks. The values in the other columns are based on the *Leave type* unit.
Balance (as at close of last pay)	Your current leave unit balance for the relevant leave type. The database updates leave entitlements at the close of each pay period. The current balance does not include deductions for leave awaiting approval or approved leave that you have not taken.
Leave approved not paid	Units approved by your manager that you have not taken or been paid for.
Applied not yet approved	Units awaiting approval by your manager.

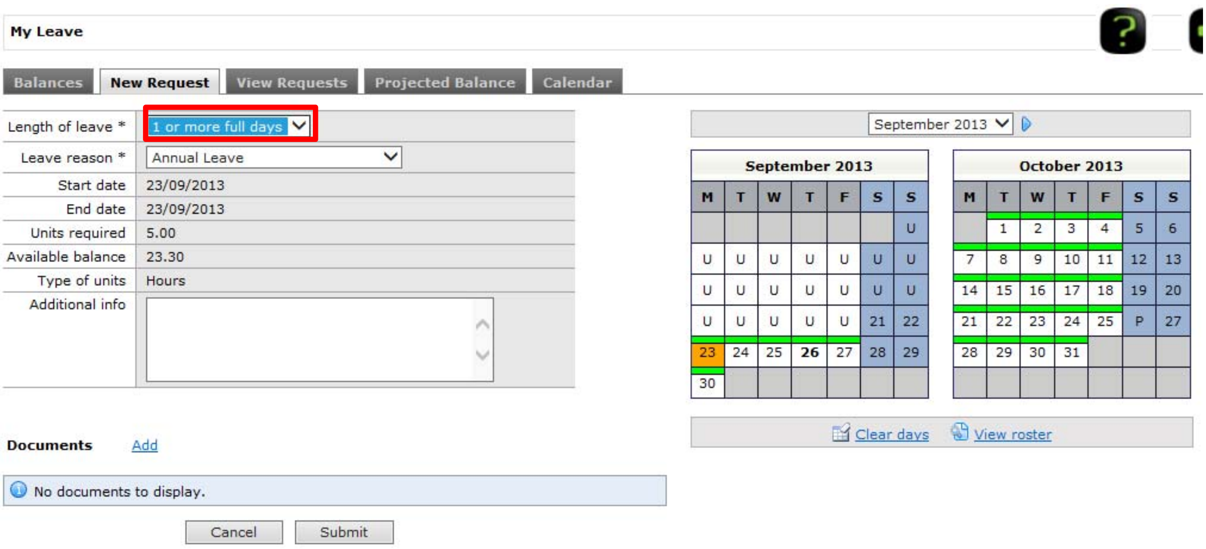
4.5.3 Leave request – 1 or more full days

The following process explains how to complete a leave request for 1 or more full days.

1. In the Length of leave combo list, select **1 or more full days**.
2. In the Leave reason combo list, select the type of leave that you want to apply for, such as "Annual Leave" or "Sick Leave".

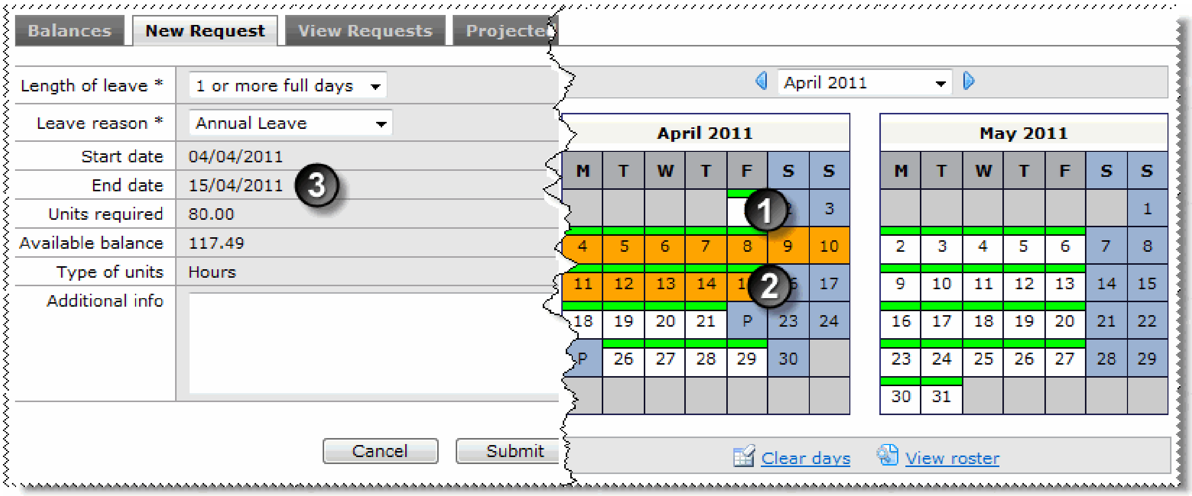
   The following fields are updated:

- *Available balance* shows your balance for the selected leave reason.
- *Type of units* displays the units assigned to your leave table (whether your leave accumulates and is paid in hours, days or weeks).



3. On the calendar, click the date or dates that you want to apply for leave, for example, 23 Sep 2013

- If you cannot see the month that you require, then select the month in the combo list or click the blue arrow buttons to move through the calendar.
- If you are applying for more than 1 day than click the first and last day of your leave, and ESS automatically fills the days in between.
- If you select an incorrect date, then click the cell again to deselect it, or click the Clear days link to clear all selected dates.



1	The green strips show the days that you are expected to work. If you need to key your units, then every day may show the green strip (public holidays are controlled by PayGlobal settings). Only the units that you enter on the *View roster* page will be subtracted from your entitlement.
2	When you click the first and last day of your leave, ESS automatically fills the days in between.
3	When you select days in the calendar, the *Start date*, *End date* and *Units required* fields are updated. *Units required* displays "0" if you need to key your hours.

4. In the *Additional info* text box, type any additional information or comments that may assist your manager with your leave request.
5. Click **Submit**.

Note: At this point Payroll does not contain any record of your annual leave request. Your manager must approve your leave request before it can be processed by Payroll.

Your manager will approve or decline your leave request and you are notified of their decision by email.

4.5.4 Calendar Symbols

ESS uses the following symbols in the calendar:

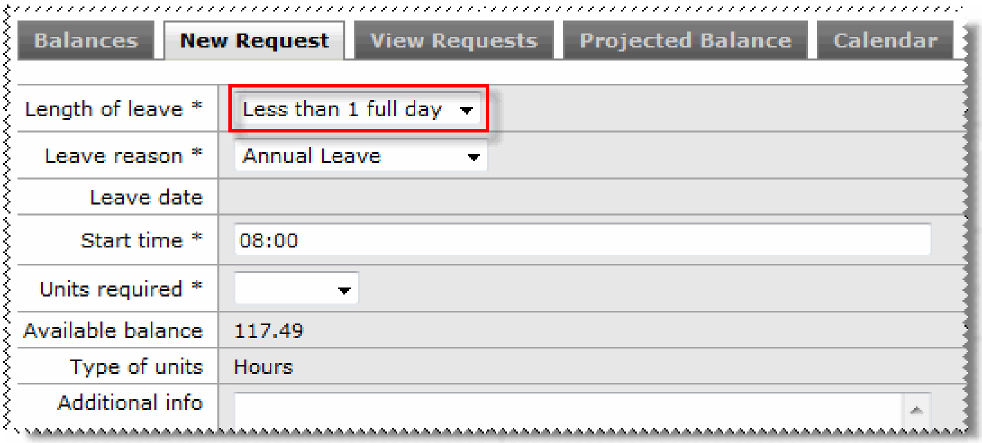
Symbol	Details
U	Dates that are outside your leave application date range set by your company, or after your *Planned termination date*. You cannot select these dates.
L	You have already submitted a leave request for this date. Alternatively, your manager may have used ESS to submit the request on your behalf, or your payroll person may have completed the request in PayGlobal for you. You cannot submit a leave request that includes a day marked with an 'L'.
L	Days that you have submitted a leave request for less than 1 full day are highlighted with a yellow triangle.
L	Days that you have submitted a leave request for 1 or more full days are highlighted yellow.
P	Public holiday. You may be able to apply for leave in ESS depending on how leave is set up for you in PayGlobal.
Note: Hold your cursor over a date that contains one of these symbols to view the details of the symbol in hover text.	

4.5.5 Leave request – Less than 1 full day

The following process explains how to complete a leave request for Less than 1 full day.

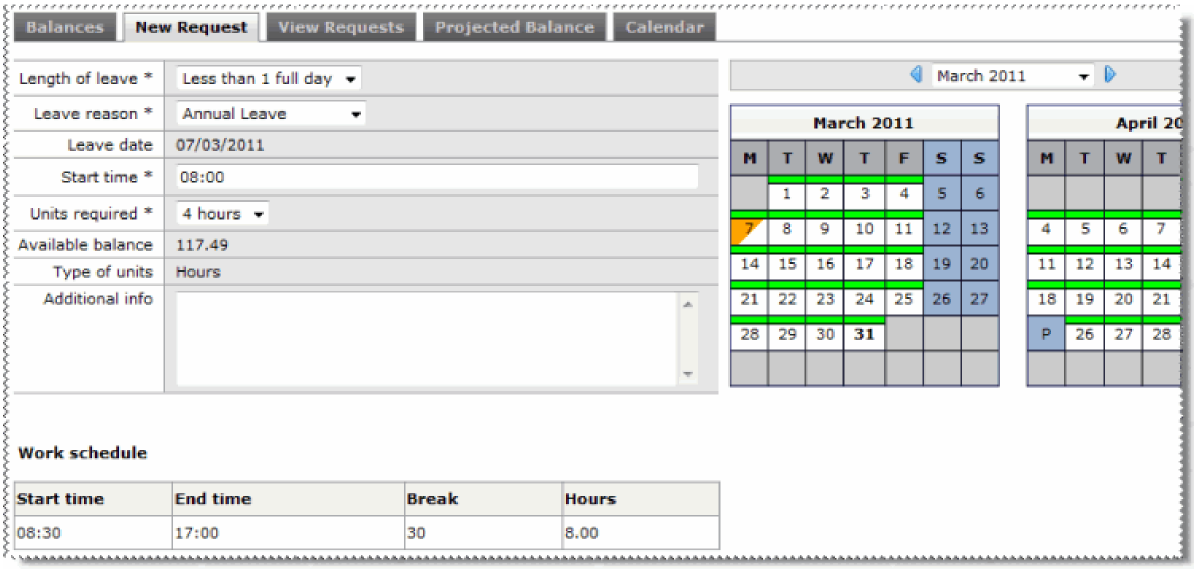
1. In the Length of leave combo list, select **Less than 1 full day**.
2. In the Leave reason combo list, select the type of leave that you want to apply for, such as "Annual Leave" or "Sick Leave".
3. The following fields are updated:

- *Available balance* shows your balance for the selected leave reason.
- *Type of units* displays the units assigned to your leave table.



4. On the calendar, click the date or dates that you want to apply for leave;

- If you cannot see the month that you require, then select the month in the combo list or click the blue arrow buttons to move through the calendar.
- If you are applying for more than 1 day than click the first and last day of your leave, and ESS automatically fills the days in between.
- If you select an incorrect date, then click the cell again to deselect it, or click the Clear days link to clear all selected dates.



5. In the Start time field, type the time that your leave will commence.
6. In the Units required combo list, select the length of your leave.

   The values in the Units required combo list are in blocks of 1 hour.

7. In the *Additional info* text box, type any additional information or comments that may assist your manager with your leave request.
8. Click **Submit**.

Note: At this point Payroll does not contain any record of your annual leave request. Your manager must approve your leave request before it can be processed by Payroll.

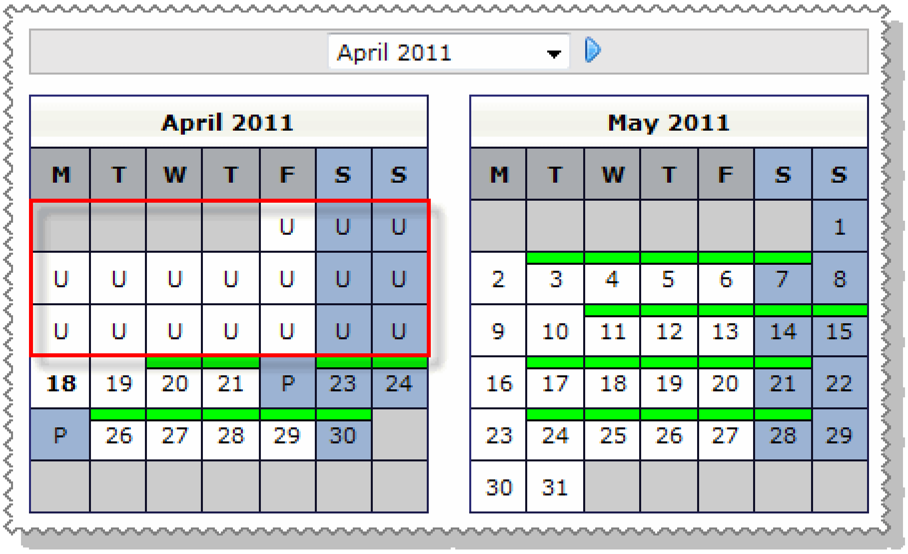
Your manager will approve or decline your leave request and you are notified of their decision by email.

4.5.6 Leave and My Time

If you use My Time to enter timesheets, then your timesheet will affect when you can apply for leave.

Neither you nor your manager can add, edit or delete a leave request if the start date of the request is in a period that has an approved timesheet.

In the following example, an employee's timesheets for 1 - 17 April have been approved. When the employee creates a new leave request, the dates on the leave calendar before 17 April are now marked as **'U '** (unavailable).



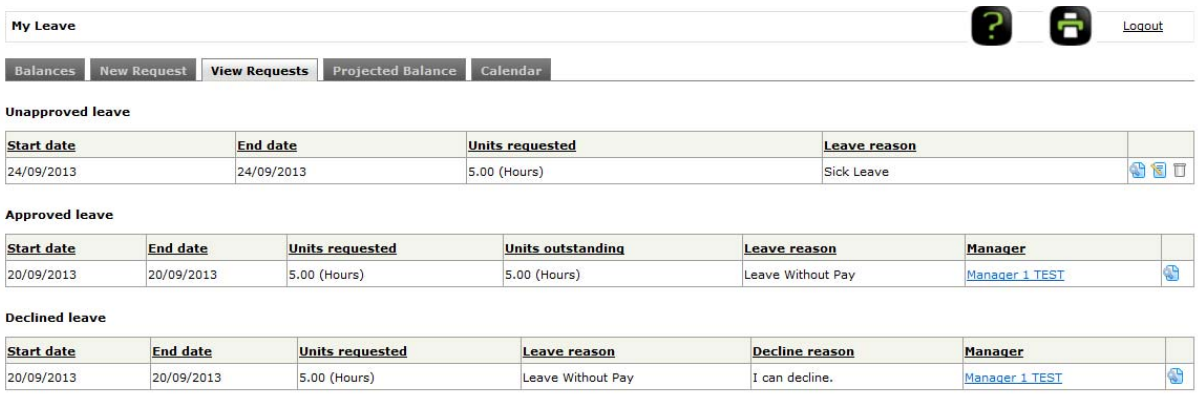
4.5.7 View requests

After you submit a leave request, your leave request details are displayed on the View Requests tab in the Unapproved leave section.

If your manager approves your leave, then this leave record moves to the Approved leave section. Your manager may also be able to edit your leave request before they approve it.

If your manager declines your leave, then this leave record moves to the Declined leave section.

When your manager approves, declines or edits your request, you will be notified by email. You can also use Active Items to track the progress of your leave request.



Start date	End date	Units requested	Leave reason
24/09/2013	24/09/2013	5.00 (Hours)	Sick Leave

Start date	End date	Units requested	Units outstanding	Leave reason	Manager
20/09/2013	20/09/2013	5.00 (Hours)	5.00 (Hours)	Leave Without Pay	Manager 1 TEST

Start date	End date	Units requested	Leave reason	Decline reason	Manager
20/09/2013	20/09/2013	5.00 (Hours)	Leave Without Pay	I can decline.	Manager 1 TEST

The View Requests tab has the following options:

	Click to view leave request details. Alternatively, you can double-click the row to view the leave request.
	Click to edit the leave details or dates (see Editing Leave Requests).
	Click to delete your leave request. When you delete a request, your manager is notified by email that you have deleted your leave request.

4.5.8 Edit leave requests

You may be able to edit or delete your leave request before it is approved.

Note: If you cannot see the edit or delete icons after your manager approves your leave, then you must contact your manager and ask them to change or delete the request for you.

Neither you nor your manager can change or delete a leave request if:

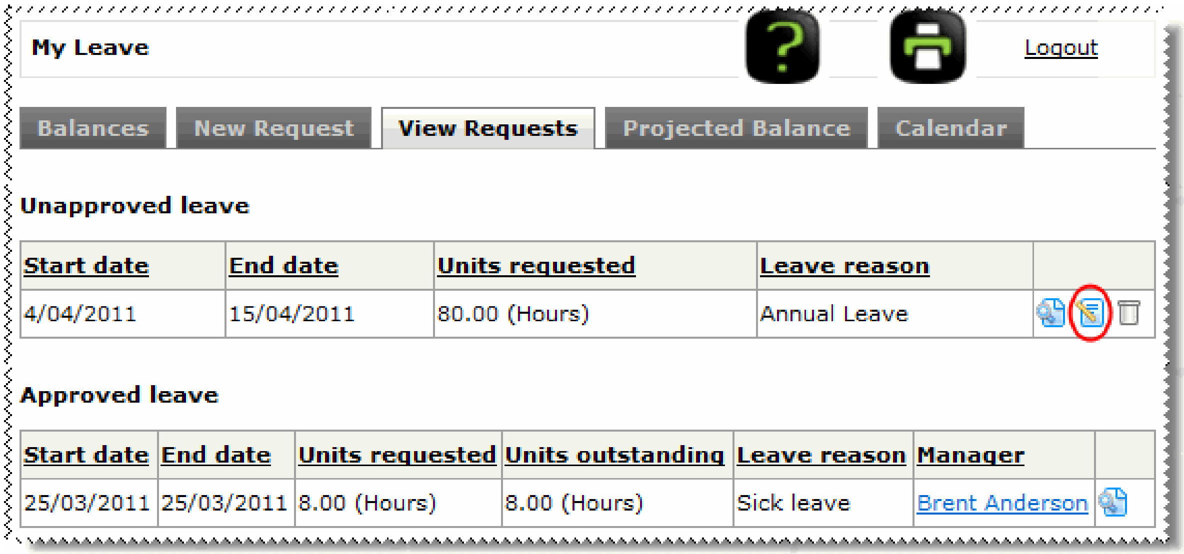
- part or all of the request is paid
- the start date of the request is in a period that has an approved timesheet or an approved timesheet day.

If you want to change or cancel your leave after part or all of your leave request is paid, then you need to contact Payroll.

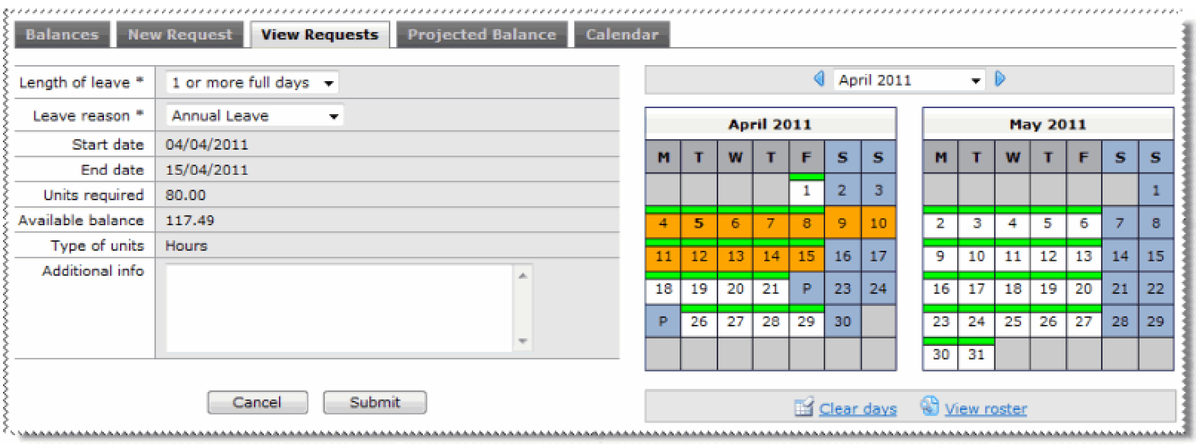
The following example explains how to edit your leave request.

1. Click the **Edit** icon for the relevant leave request (in the Unapproved leave or Approved leave section).

In the example below, the employee can edit unapproved requests only.



The leave request details appear.



1. Your original leave request opens.

2. Update the required details, such as the leave reason or your leave dates.
3. Click **Submit**.

   When you submit the request, the following processes occur.

   - A new history event is added for the leave request workflow unit.
   - In Active Items, when you click the *History* link for the original leave request, you will see the history event with *Action* = “Edited by lodger”.
   - Your manager is notified by email that you have edited your leave request, so they must approve or decline the updated leave request.

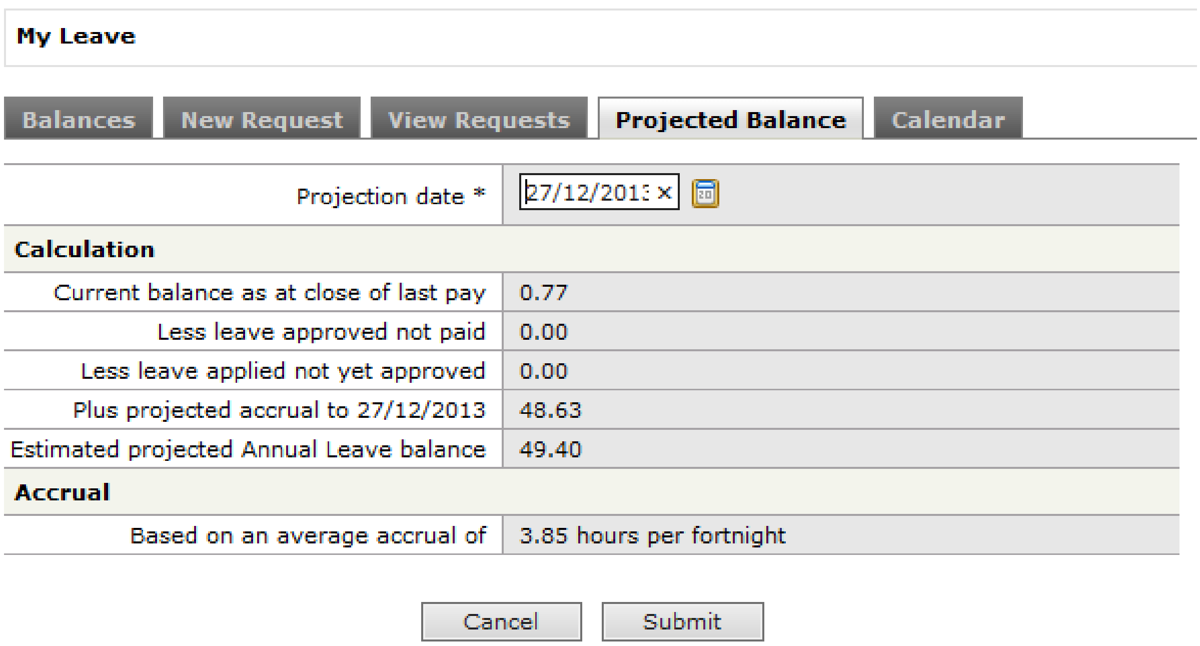
4.5.9 Projected Balance

Note: *Projected Balance* can be used for annual leave only.

ESS can estimate what your annual leave entitlement will be on a specific date. For example, you can check what your entitlement will be for the Christmas holidays.

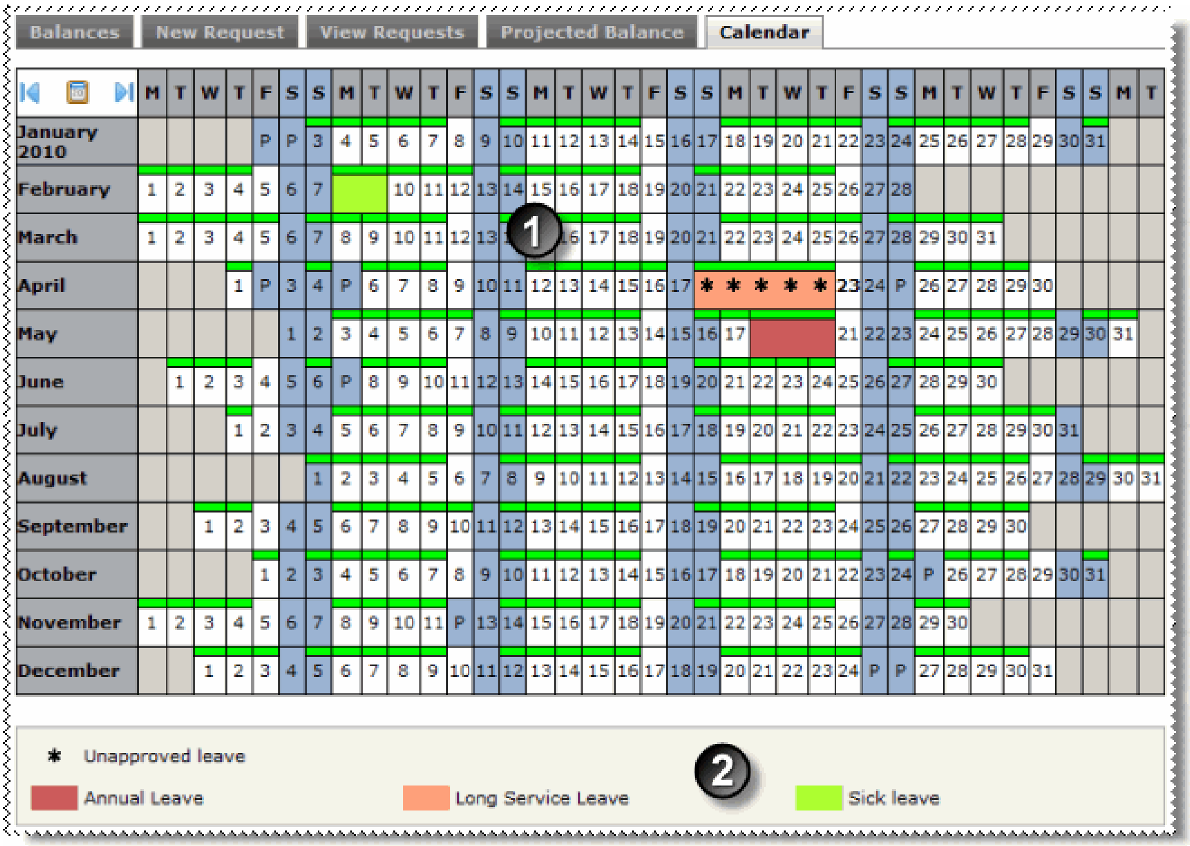
Note: You must have been paid at least once before ESS can project your leave.

1. Click **My Leave**.
   The *My Leave* | *Balances* tab page appears.
2. Click the **Projected Balance** tab.
3. In the *Projection date* field, type the required date or click the calendar icon to select the date from the calendar.
4. Click **Submit**.
   ESS displays your projected leave balance for the selected date and an explanation of the balance calculation.



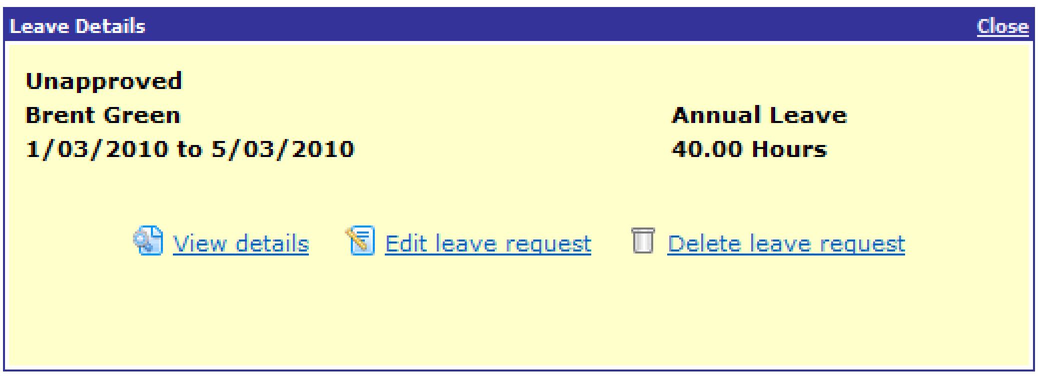
4.5.10 Leave Calendar

Use the *Calendar* tab to view your leave information and edit or delete unapproved leave requests.

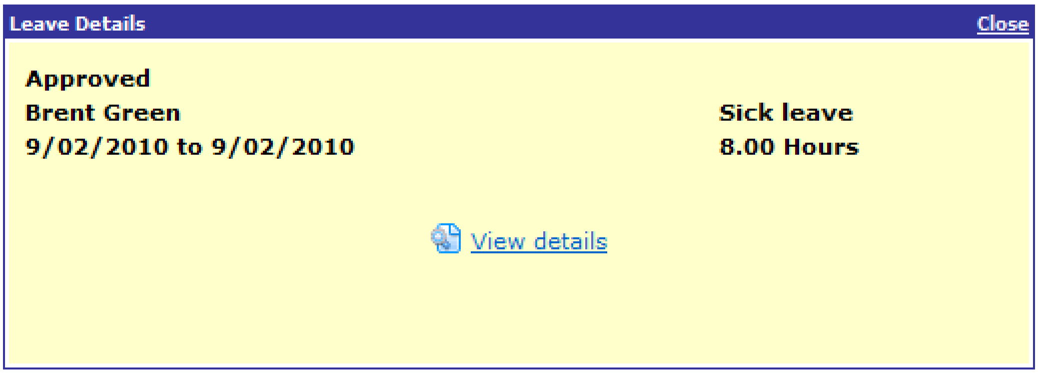


1	Your leave requests are highlighted on the calendar.
2	The legend shows: • the colour that is assigned to each leave reason • the symbols that show the state of the request.

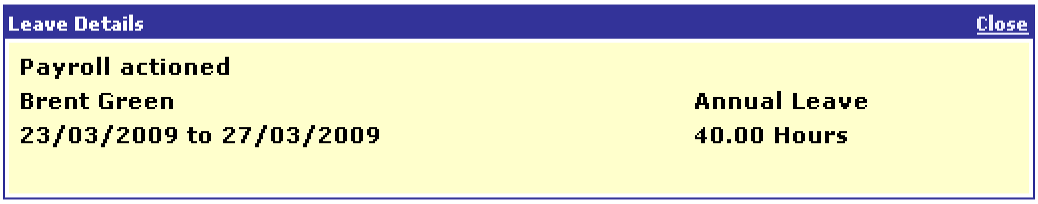
You can click a leave day on the calendar to view more information about the request in a popup. The *View details* link allows you to view your leave request, and you may also be able to edit or delete approved leave requests



The approved leave popup enables you to view the request.



The payroll actioned popup shows leave that you have taken that was processed, paid to you and deducted from your leave balance.



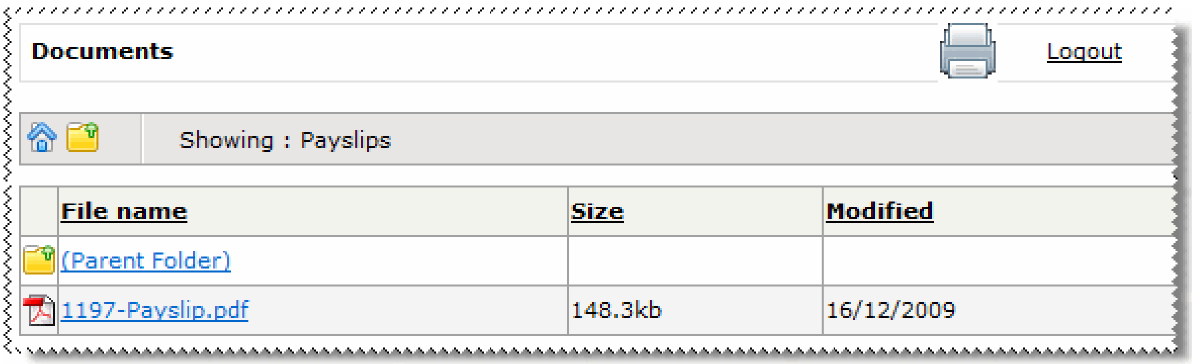
4.6 My Payslips

The *My Payslips* section lists your payslips. ESS users can view their own payslips only, so your manager cannot view your payslips.

1. Click **My Payslips**.

   A list of your payslips appears.

   Note: Payslips are sorted in date order with the newest payslip at the top.



2. Confirm that the date in the *Modified* column is the date of the payslip that you require.
3. Click the **File name** of the payslip that you want to view.

   A new browser window opens and your payslip is displayed in the new window as a PDF document. Depending on your browser configuration, you may be asked if you want to *Open* or *Save* your payslip.

4.7 My Issued Items

The *Issued Items* section displays items that have been assigned to you.

Issued Items Logout

Issued Items

Item code	Description	Quantity	Date issued	
CALC	Calculator	1.00	05/07/2010	
CELLPH	Cell Phone	1.00	03/12/2010	
SECCARD	Security Swipe Card	1.00	21/05/2009	

Cancel

Admin users are responsible for recording and updating items issued to you by Cook Islands Government.

4.8 My Time

You can use *My Time* to:

- Enter timesheets for a specified period and submit them to your manager for approval
- View timesheet history

Timesheet Status colours

The timesheet status colour indicates the state of your timesheet, the following is the timesheet status colours configured for Cook Islands Government timesheet:

Timesheet status colours	
No-timesheet colour *	#D3D3D3
Not-submitted colour *	#FF0F1F
Submitted colour *	#12E38F
Approved colour *	#1787E8

4.8.1 Enter Timesheets

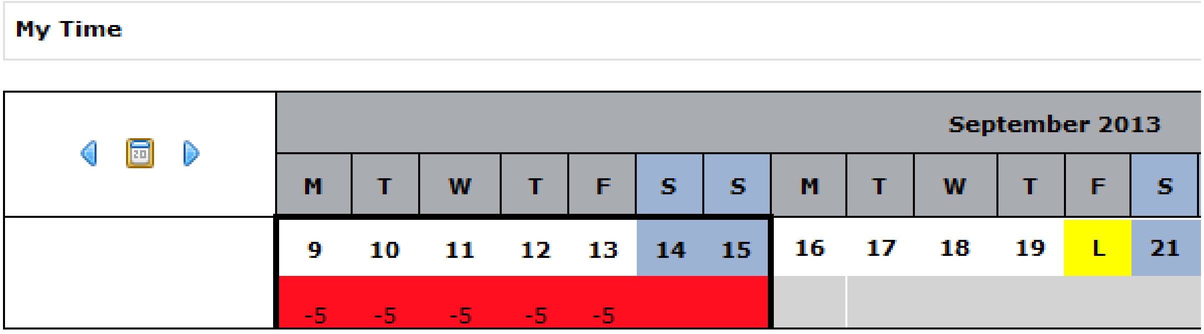
Use the following procedure to complete your timesheet.

1. In the navigation menu, click **My Time**.

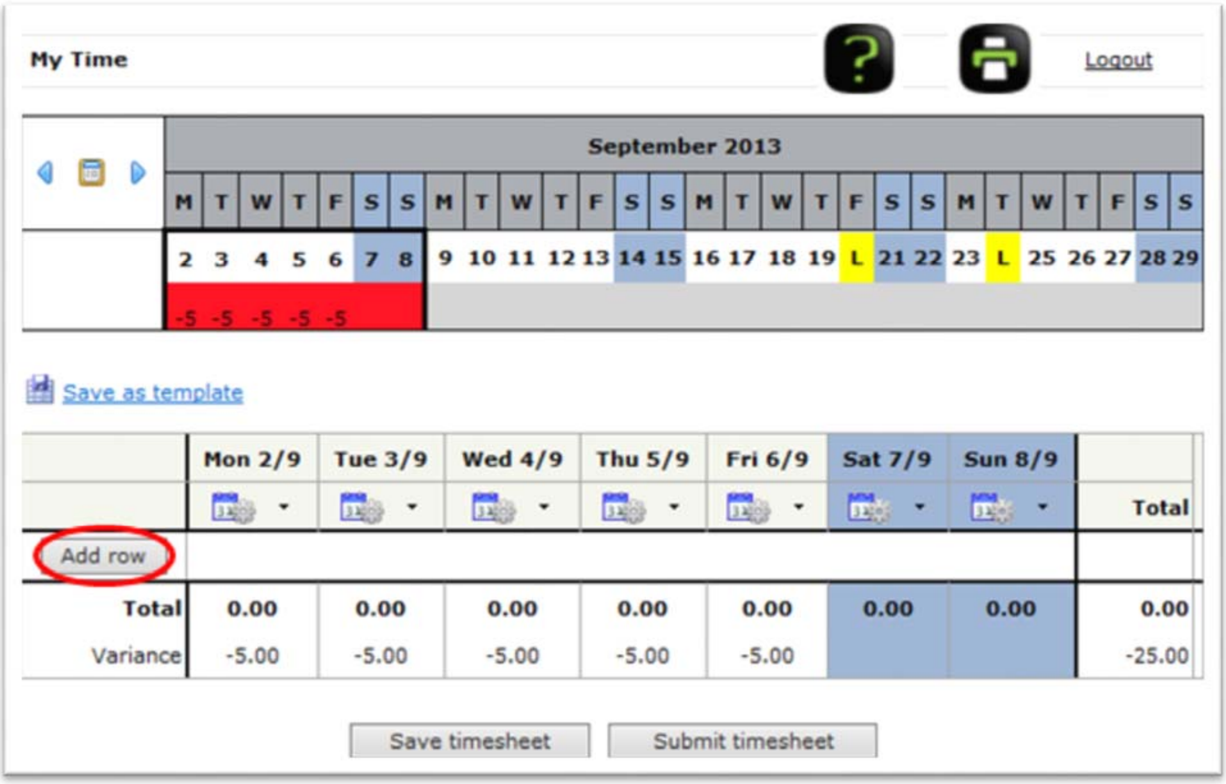
   The *My Time* page appears.

   Periods that are highlighted with the not-submitted colour (red) are ready for you to enter your timesheet.

Note: When timesheets are generated for a period, the period is highlighted the not-submitted colour and a *Timesheet [date]* item is created in your Active Items with *Status* = "Not submitted".



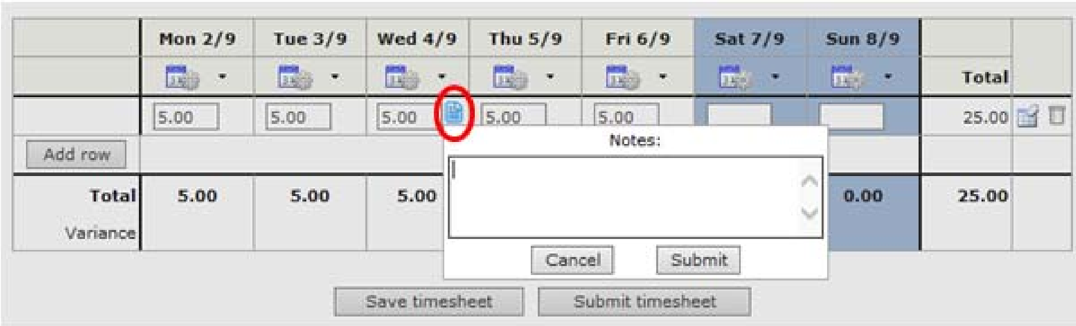
1. The "-5" below each day in the image above is the expected working hours, the hours may vary depending on whether you are a part time or full time staff. The hours will show as negatives because the hours worked has not yet been updated on the timesheet.
2. Click a highlighted day.
   The week that you clicked opens in the timesheet grid.
3. Click the **Add row** button.



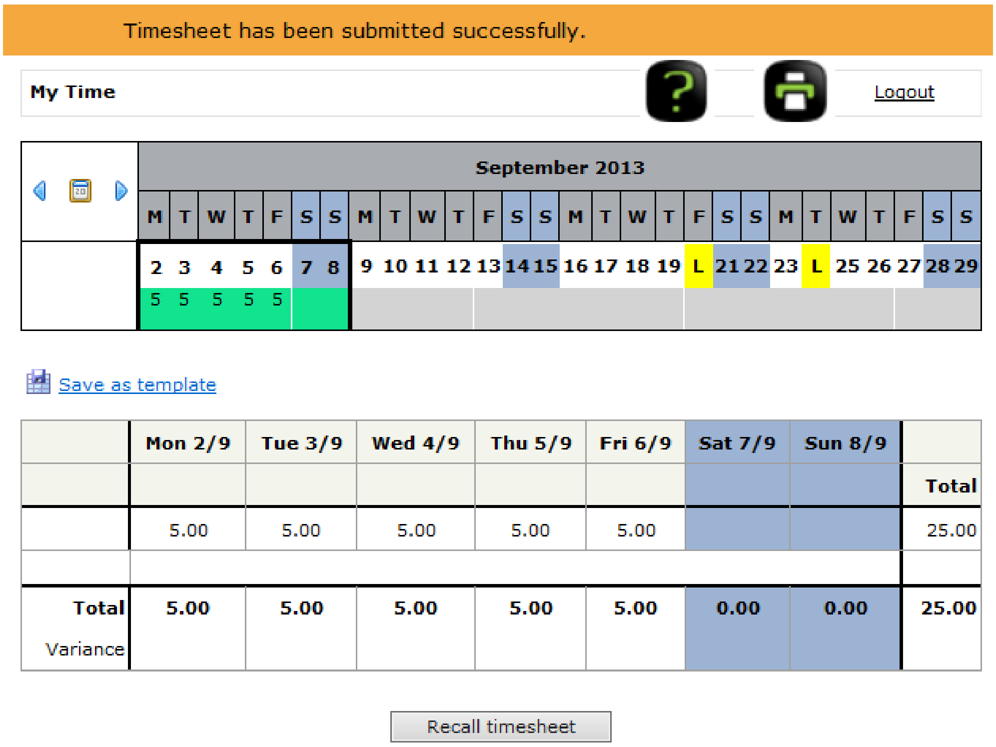
4. Complete the total number of hours that you worked each day. For example, if your working hours is from 8:00 to 13:00 then you would enter "5:00". In this example, you only need to type **5**, then tab to the next day and the 00s will be automatically populated.

   - You can add a note to show information about a timeband or to explain exceptions.

Hold your cursor over an hours cell to see the note icon. Click the icon to open the *Notes* popup.



5. If you can see the ***Variance*** row, then this row shows a comparison between the hours you were scheduled to work (set up in PayGlobal) against the hours you have entered in your timesheet.
6. Click **Submit timesheet** to submit your completed timesheet.



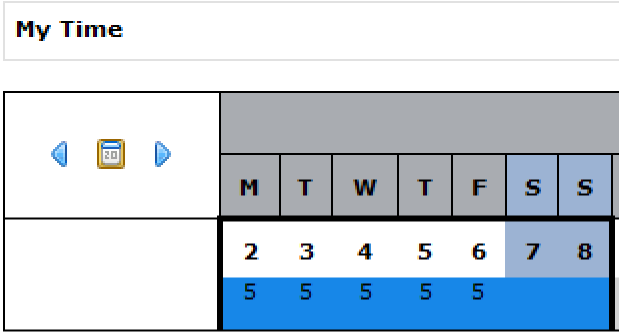
When you submit your timesheet successfully:

- The following message appears: ***Timesheet has been submitted successfully.***
- The background of the period changes from the not-submitted colour (red) to the submitted colour (green).
- The ***Recall timesheet*** button is visible. ***Recall timesheet*** allows you to retrieve a timesheet that you have submitted so you can edit or add additional Timebands to it. The Recall timesheet button is not visible once the timesheet is sent to Payroll.
- Your manager is advised by email that you have submitted a timesheet.
- The ***Timesheet*** item in your Active Items is updated to "Submitted".

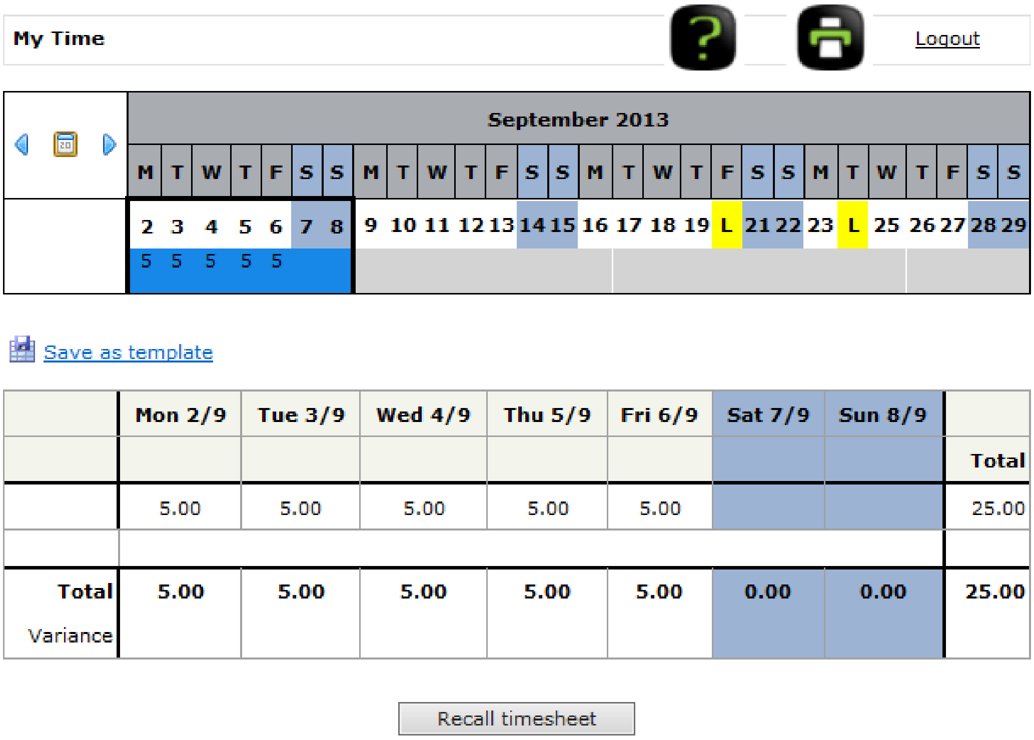
- On the ***My Timesheets*** calendar, you can still click and view the timesheet after you have submitted it.

When your manager approves your timesheet:

- The background of the period changes to the approved colour (blue).



On the *My Timesheets* calendar, you can still click and view or Recall the timesheet after your manager has approved it.

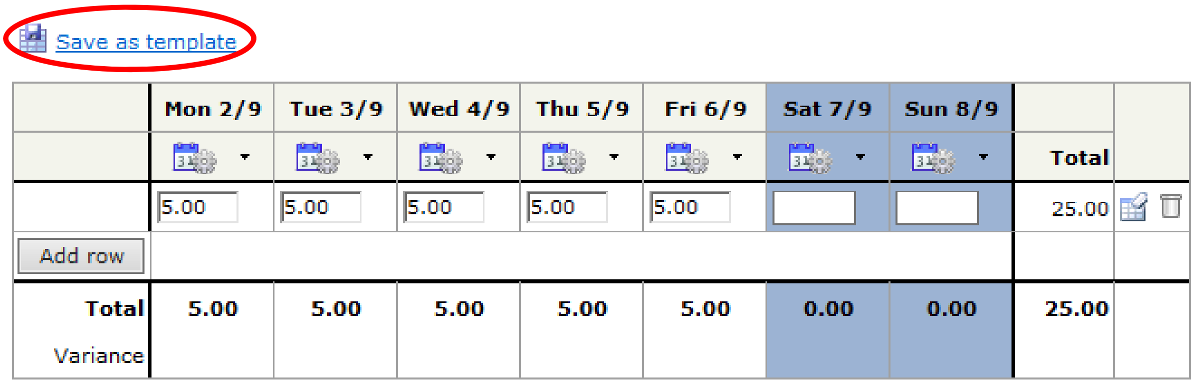


4.8.2 Create a timesheet template

If your timesheets will always have similar details, then you can save the details in a template to use again.

When you save a template, it is saved with all the information that you have entered. If some of the details will change regularly, then you should clear those fields before you save the template.

Click the **Save as template** link



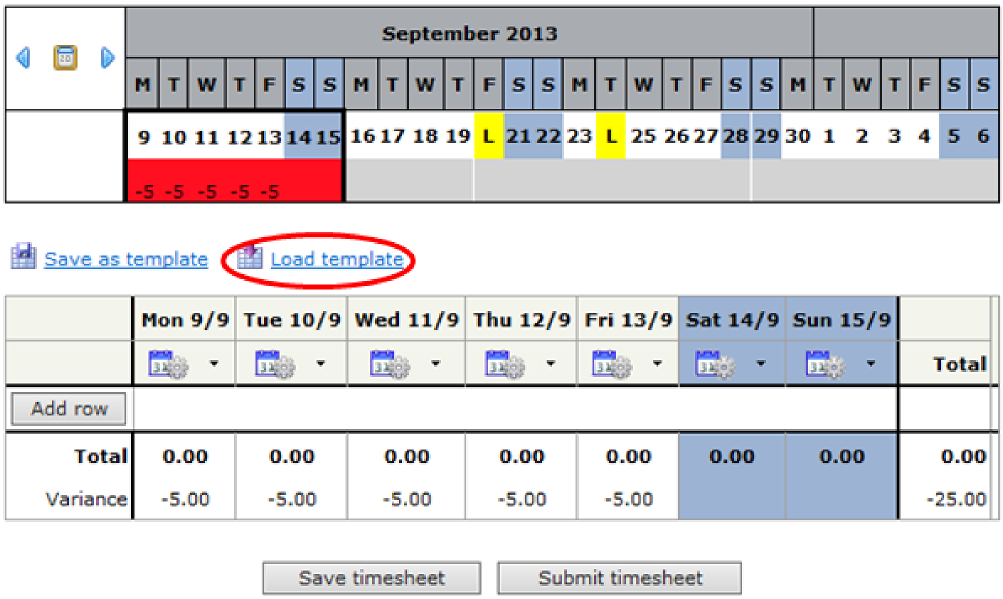
When you click *Save as template*, a popup appears. Type **Default** in the *Template name* field, and click *Submit*.

4.8.3 Load a template

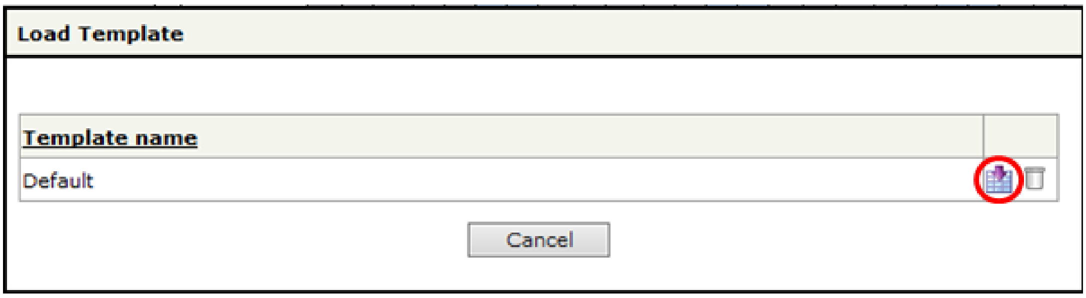
When you have saved a template, the *Load template* link appears.

To apply a template:

1. Click *Load template* to see the templates that you have saved.



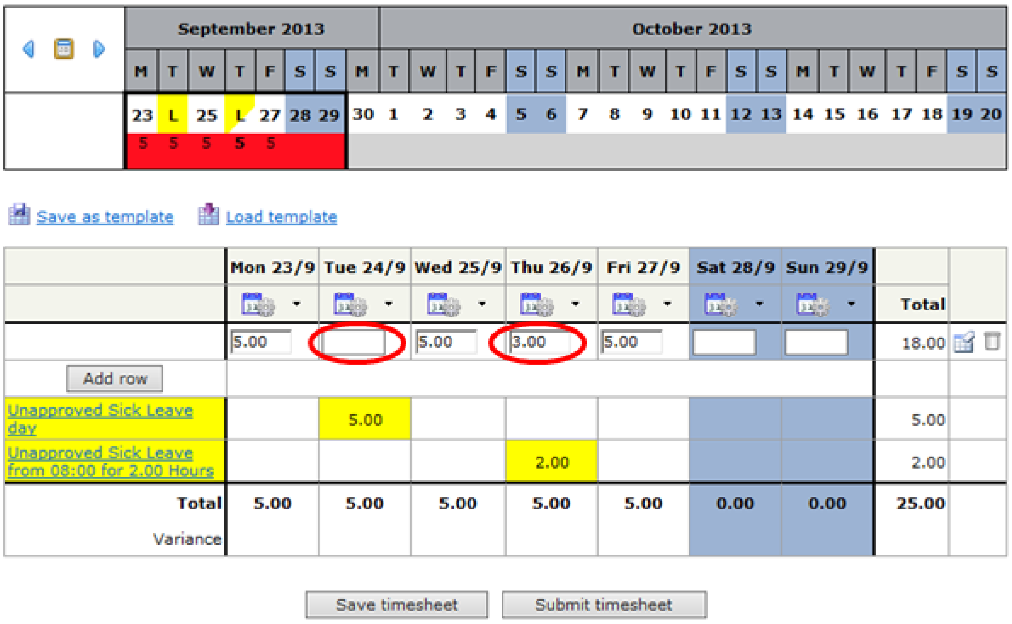
2. Click the *Apply this template* icon beside the template that you want to apply.



Click the Delete icon to delete templates that you no longer require.

3. If your timesheet has leave days you should not load the Default template, instead you should click on the **Add row** button to add the hours worked in a day.

Important: You should not enter any hours for days where leave has been applied for more than 1 full day. If leave is taken for less than 1 day, you should only enter the remaining hours worked during the day apart from the leave hours.

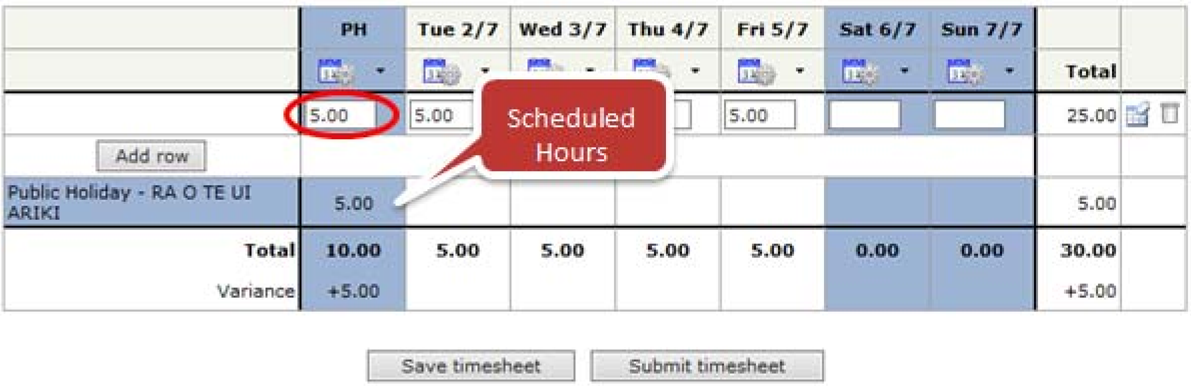


4.8.4 Timesheet grid options for Public Holiday

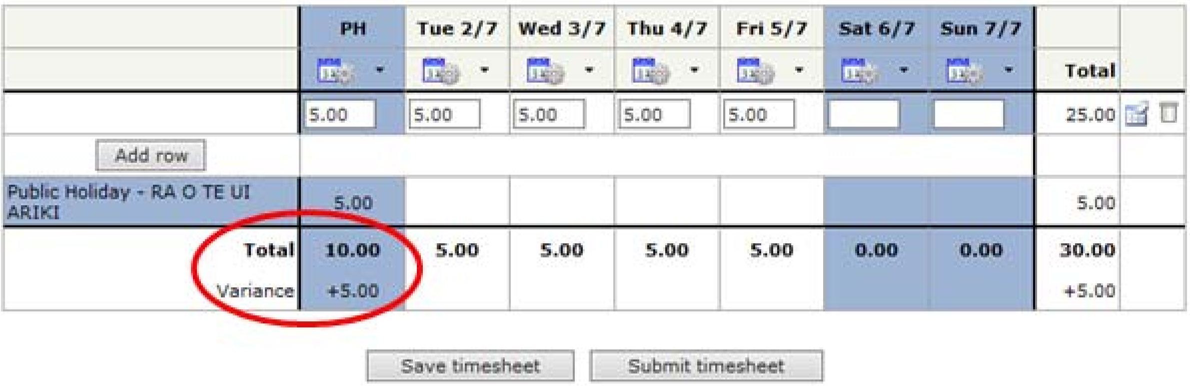
ESS also displays public holidays on timesheets.

Public holidays are displayed in a separate row. The description of the holiday is shown in the first column and the background of the description cell and the day are highlighted blue.

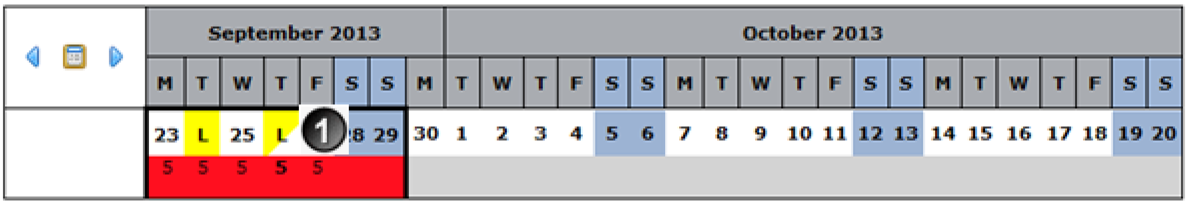
The hours field will still be available, you are to enter the scheduled hours in the hours field for the public holiday. Example if you are scheduled to work 5 hours on the day if it were not a public holiday than you will enter 5. If you do not enter any hours you will not be paid for the public holiday.

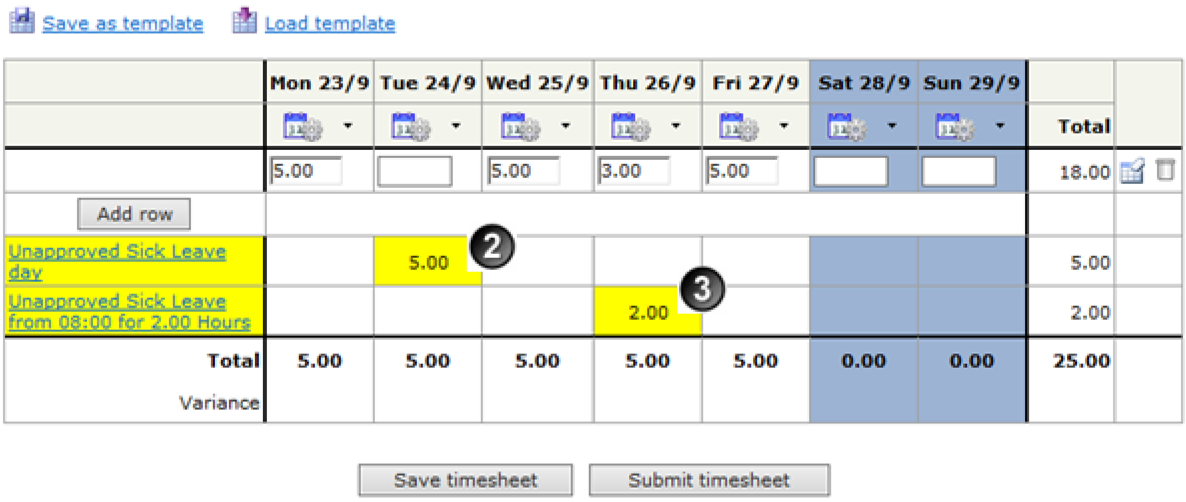


Note: The total hours will be shown as 10 at the bottom, and the variance as +5, you are to ignore this, you will only be paid for the hours entered on the public holiday.



4.8.5 Timesheet grid options for Leave





1 **Leave on calendar:**

L Days that you have submitted a leave request for less than 1 full day are highlighted with a yellow triangle.

L Days that you have submitted a leave request for 1 or more full days are highlighted yellow.

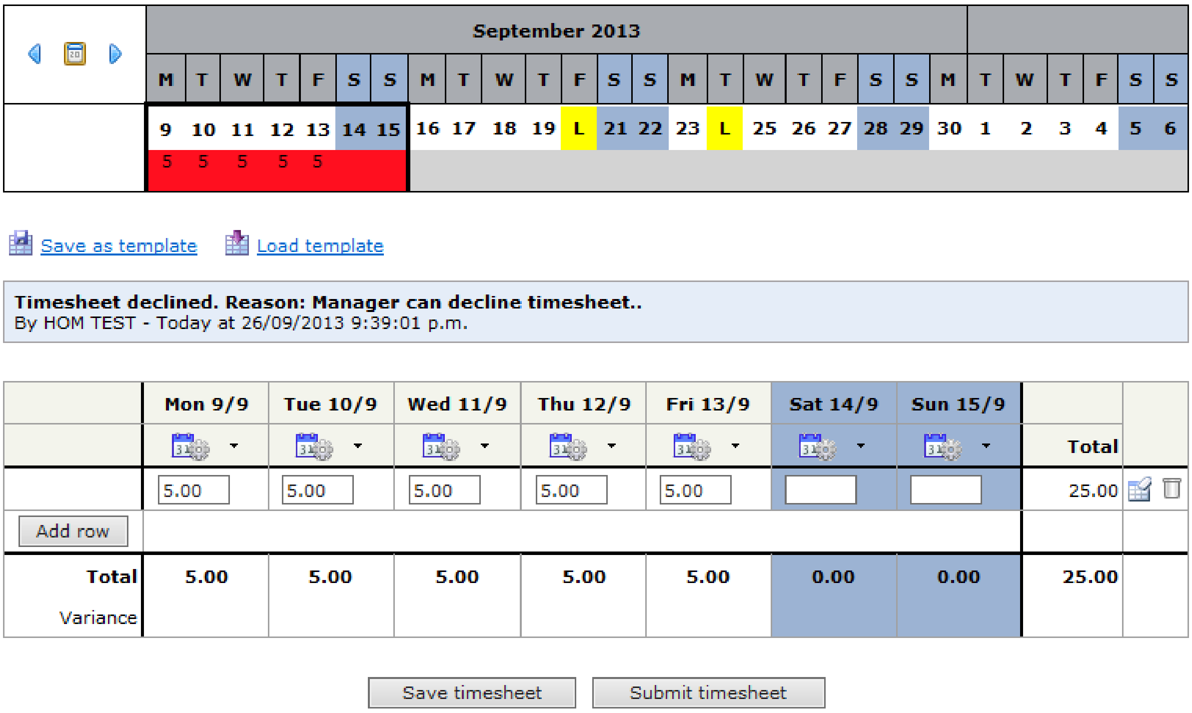
2 **Leave - full day:** Full leave is displayed in a separate row. The type and whether the request is approved are displayed in the first column. The details column and day cell are highlighted yellow.

3 **Leave - partial day:** Partial leave is displayed in a separate row. The type, start time, duration and whether the request is approved are displayed in the first column. The details column and day cell are highlighted yellow.

4.8.6 Declined Timesheet

If your timesheet is declined, then you are notified by email.

When you open your timesheet, a message displays the reason why your timesheet was declined.

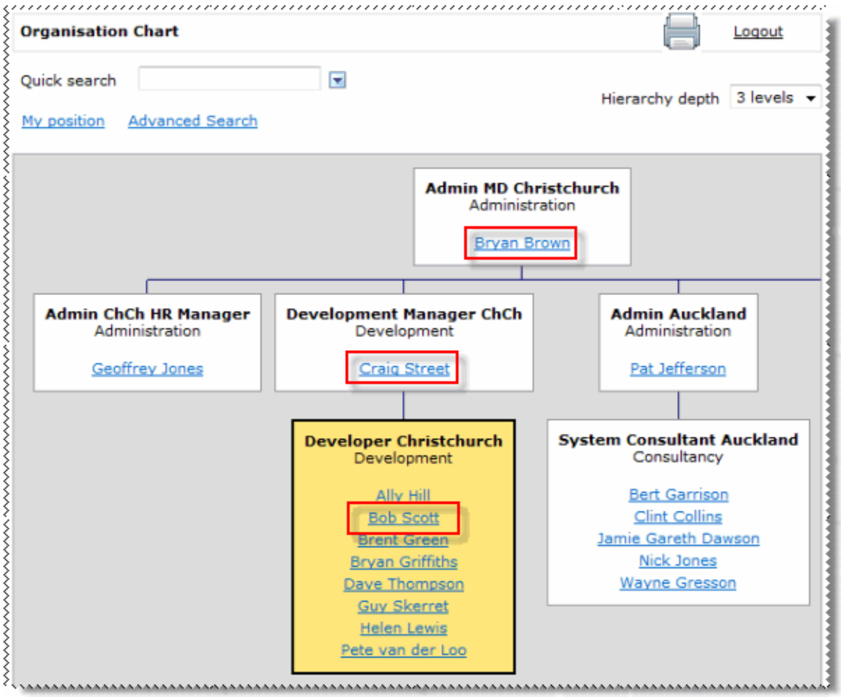


You can view the declined reason, and then edit and resubmit the timesheet if required.

4.9 View Org Chart

Organisational charting allows you to display the company structure graphically. Managers are displayed at the top of the chart and the employees that they are responsible for are listed below them.

Click on the **View Org Chart** menu link to view the Organization Chart.



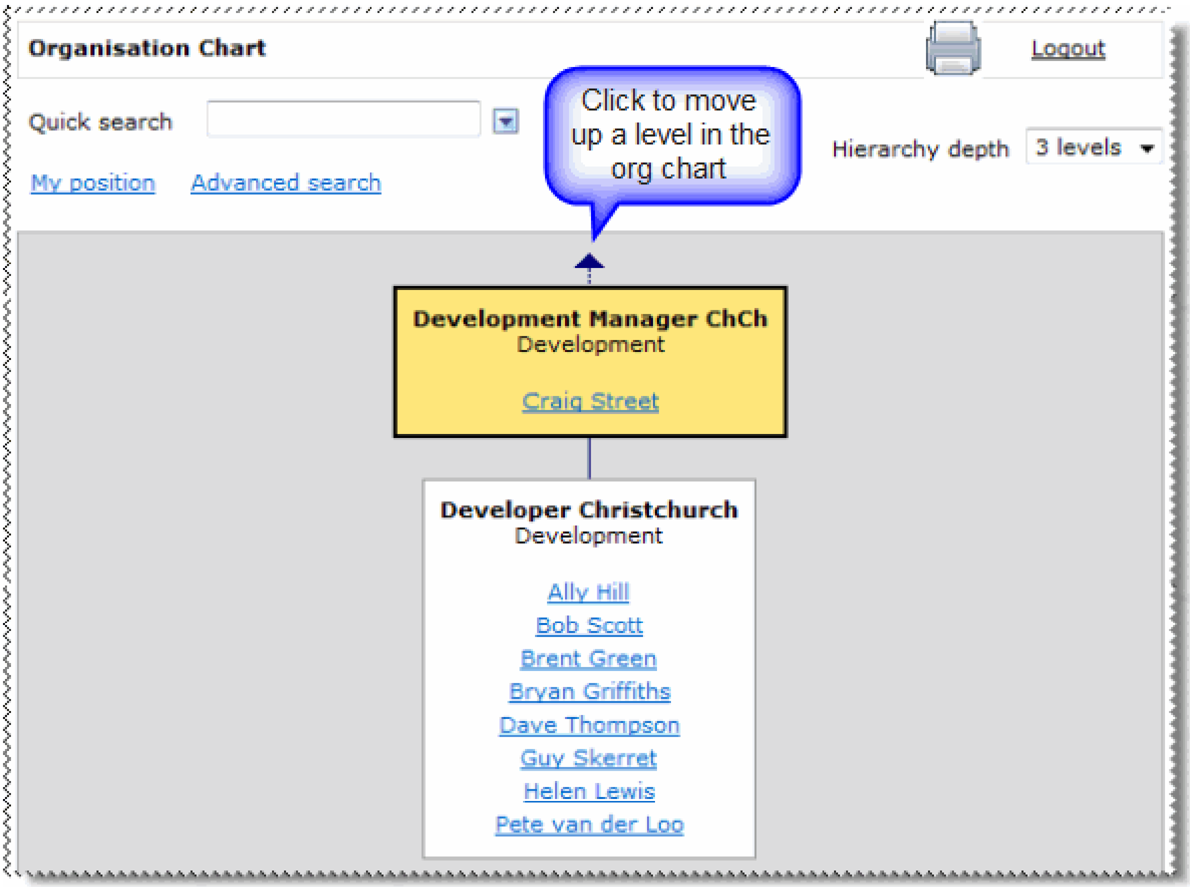
- If Bob Scott submits a leave request, then Craig Street is responsible for approving or declining the request. If higher approval is required and Craig has approved the request, then Bryan Brown is responsible for approving or declining the request.
- If Craig Street submits a request to promote Helen Lewis, then Bryan Brown is responsible for approving or declining the request.

Note: Depending on how your HRSS Administrator has set up the organisational chart, you may see an employee's photo beside their name.

4.9.1 Using the Org Chart

In the navigation menu, when you click **View Org Chart** the *Organisation Chart* page displays your position and all employees below you in the hierarchy.

For example, when Craig Street (the Development Manager) uses this option, he sees the following organisational chart.

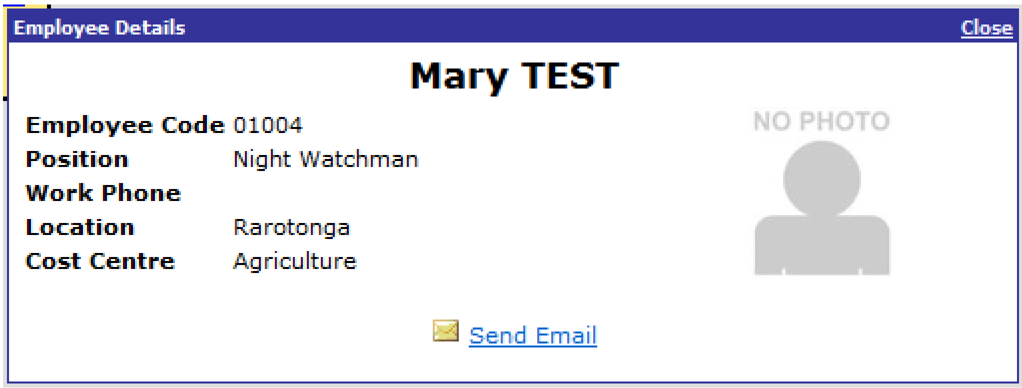


If Bob Scott used this option, then he would see only himself and the other developers that share his position.

Note: If a position has no one assigned to it, then the organisational chart displays the position as an empty box.

You have the following options:

- Click the blue arrow at the top of the chart to move up a level
- Click a person's name to see their details, which are displayed in a popup



- Use Quick search or Advanced search to search for an employee in the org chart.

The ***My position*** link resets the organisation chart back to your position.

4.9.2 Quick search

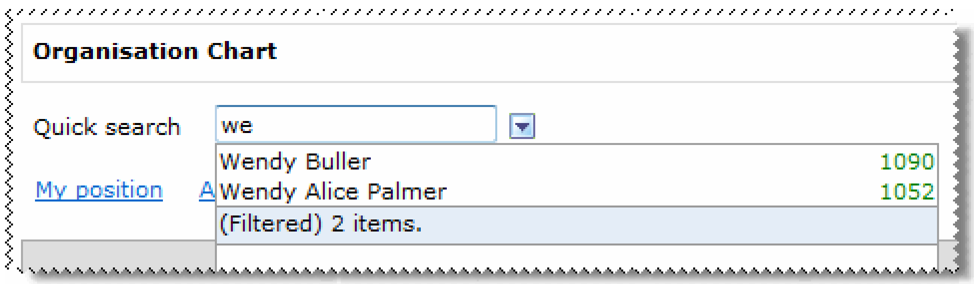
Quick search uses a lookup to allow you to search for an employee in the organisation chart.

You have the following options:

- Click in the field and start typing.

  The auto-complete list appears. When you start typing in a lookup field, the items are filtered by the value you type using the "has word that starts with" clause on the code and description of the items.

  For example, the following lookup list is reduced from 31 items to 2 items when you type "we".



Important: If you want to view the whole list, then you must clear the text in the field.

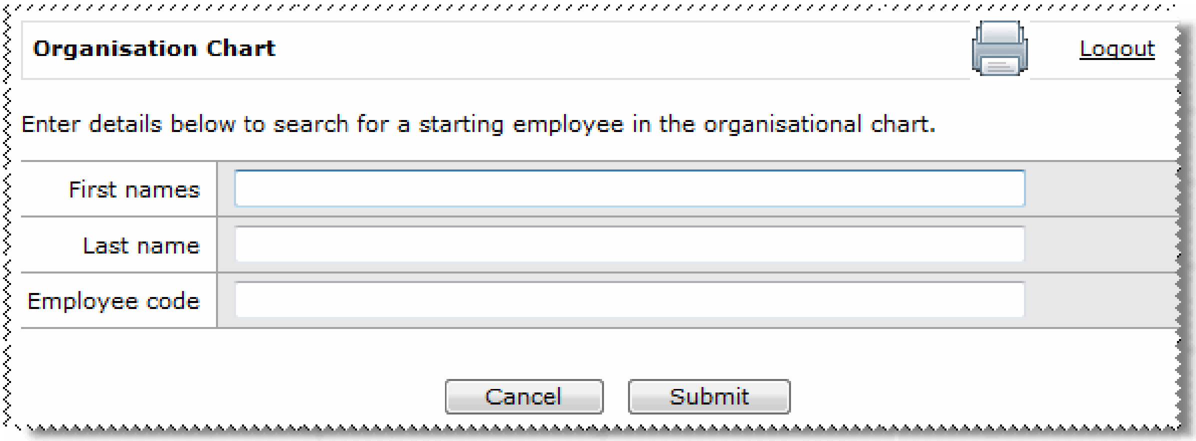
- Click the down arrow to display the employees in the lookup list.

  The list automatically displays a maximum of 15 items. The status row at the bottom of the list shows the number of employees available. Click the status row to see more employees.

When you select an employee from the list, the organisation chart displays the employee's position.

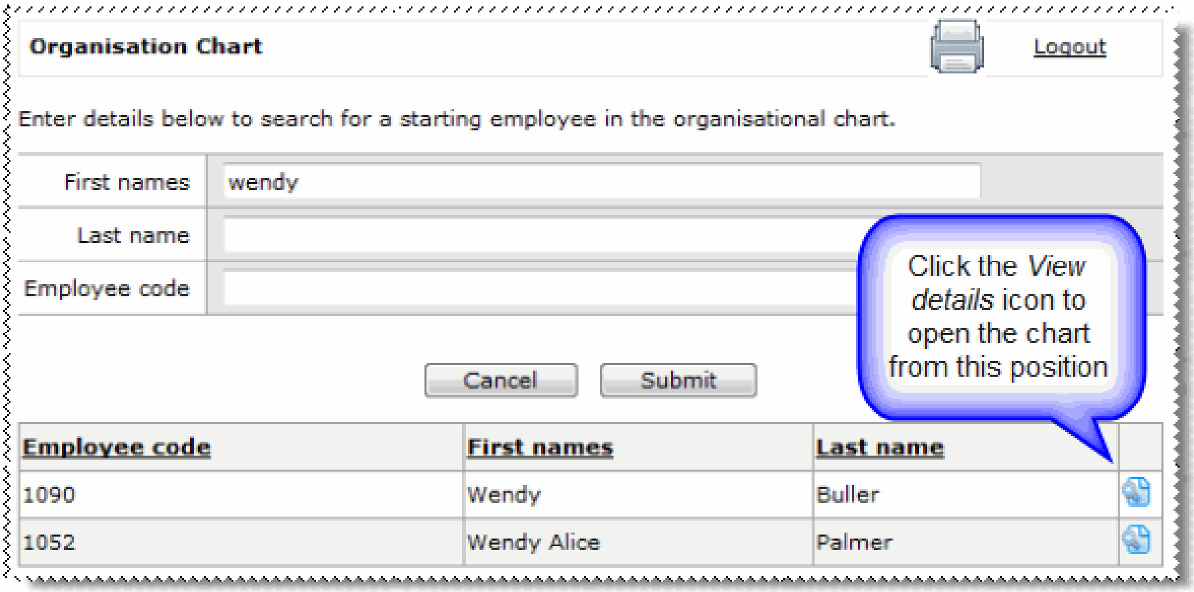
4.9.3 Advanced search

Click the *Advanced search* link above the chart to search for a position in the organisational chart using one criterion, or enter several criteria to refine the results.



For example, only one record is returned if you enter an *Employee code*, which is a unique number in the database.

If you type *Wendy* in the *First Name* field, then ESS returns records for all the employees named Wendy (as shown below).

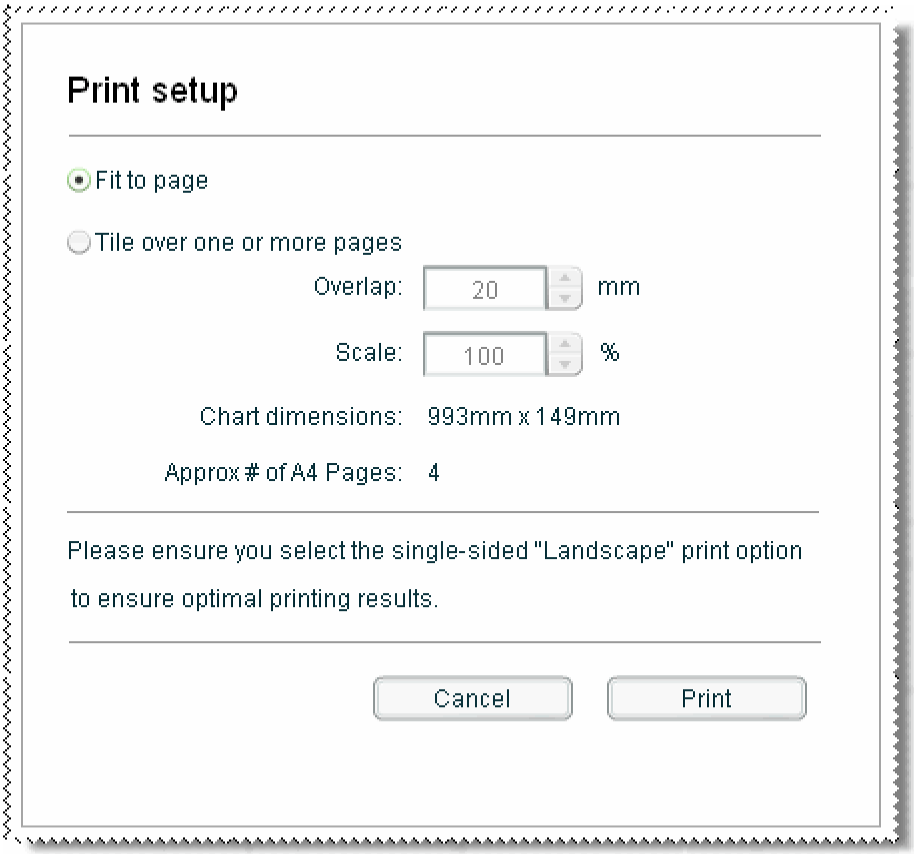


Note: If more than 20 results are returned, then only the first 20 results are displayed and the following message appears: *More than 20 results were found. Please refine your search*.

4.9.4 Printing an Organizational Chart

Note: If you click the **Print** icon at the top-right of the page, then you will print the organisation chart page that you are currently viewing on screen, not the organisation chart area.
Use the following procedure to print an organisational chart.

1. Click the **Print Organisation Chart** button at the bottom of the page.
   The *ESS Print setup* window appears.



2. Use the following table to complete the print options:

Option	Details
Fit to page	Forces the chart to fit onto one page.
Tile over one or more pages	The chart is printed over multiple pages. Enables the *Overlap* and *Scale* options.
Overlap	Each page overlaps by the number of millimeters specified here.
Scale	You can scale the chart to control how large the printed chart will be.
Chart dimensions	The size of the printed chart based on the scale selected.
Approx # of A4 Pages	Indicates how many A4 pages will be required to print the chart using the current settings. This value is based on printing the chart in landscape orientation.

3. Click **Print**.

   The Windows *Print setup* window appears.

   If the width of your chart is greater than its depth, then you need to change your printer orientation to *Landscape*.

4. Follow your usual print procedures to complete printing the chart.

Note: If photos are displayed on the org chart, they will not be included in the printed output.

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