



Employee Self-Service Add-ons

Introduction

This document provides an overview of a suite of add-ons that are available for the People Inc. Employee Self-Service (ESS) module. These add-ons provide additional functionality for ESS users. Separate documents are available that provide a more detailed description of the functionality provided by each add-on.

Workflow via the ESS

Workflow can be added to the Employee Self-Service using the Screen Designer. This enables users to define and control the flow of information between employees, managers and HR.

A good example of a workflow process is the submission and approval of absence requests provided in the standard configuration of the ESS system. This enables employees to submit absence requests. These are routed to their manager for approval. Once approved, the employee's absence history records are updated. Requests can be rejected by managers (and then amended and re-submitted by employees). Employees can request that a holiday that has already been approved be withdrawn (the withdrawal request has to be approved by their manager before the system is updated). Managers and employees are informed via e-mail at each stage of the process.

To define custom workflow within the ESS requires a thorough understanding of the People Inc. system and the Screen Designer tool. Consequently, only advanced users are able to add this kind of functionality to the system.

ESS Add-ons

To make workflow more accessible, a suite of add-ons that each automates a particular workflow process are now available. These include:

- An add-on to enable employees to manage their own personal details (address changes, bank account details, next of kin)
- An add-on that enables employees to submit expense claims. These are routed to their manager for approval and are then finalised by HR or finance before payment.
- An add-on that enables employees to submit timesheets. These are routed to their manager for approval and are then finalised by HR or finance before payment.
- An add-on that enables managers to create departmental timesheets. These are finalised by HR or Finance before payment.
- An add-on that enables users to publish appraisals via the ESS. These are then completed by employees and managers.

The add-ons can be installed on an existing People Inc. ESS system and the new functionality is automatically published to existing ESS manager and ESS employee accounts.



Other People Inc. Add-ons

In addition to the add-ons that provide workflow within the ESS, there are a number of further add-on modules that can be used with the People Inc. system.

- The Single Sign-on add-on is designed to synchronise ESS login details with Windows account credentials. When this used, ESS users do not need to enter login details to access the ESS.
- The Web Recruitment add-on publishes details of vacancies from within People Inc. on an organisations website. Potential candidates can then submit applications on-line.

Managing Employee Details

The employee details add-on enables employees to manager their own details as recorded within the People Inc. system. An employee can update their address details, telephone numbers and e-mail address, their bank account details, and can enter or update the details of contacts (next of kin, doctor, etc.). No approval is required when an employee makes a change, but the People Inc. user can choose to receive notification of changes (and details of the change can be reviewed if necessary).

Expense Claims

The expense claim add-on provides the following workflow. Firstly, an employee completes and submits an expenses claim form on-line (it is possible for the employee to attach expense receipts to the claim if required). The claim is routed to their manager; their manager is informed via e-mail and can then reviews/approve the claim via the ESS (all new claims submitted by members of their team are listed together). If the claim is rejected it is passed back to the employee for re-submission. When the claim is approved it is passed for second-level approval (by HR or finance). At each stage, the employee is informed of progress via e-mail. Information regarding approved expenses is extracted for each pay run and the information is then available for reporting.

Timesheets

The employee timesheets add-on works in a very similar way to the expense claims add-on. Firstly, an employee completes and submits a weekly or monthly timesheet on-line. If there are existing absence bookings recorded in People Inc., the system will add these to the timesheet automatically. The submitted timesheet is routed to their manager; their manager is informed via e-mail and can then reviews/approve the timesheet via the ESS (all new timesheets submitted by members of their team are listed together). If the timesheet is rejected it is passed back to the employee for re-submission (or, if the option is enabled, the manager can simply update the timesheet themselves and then approve it). When the timesheet is approved it is passed for second-level approval (by HR or finance). Information regarding approved timesheets is extracted for each pay run and is available for reporting.



Departmental Timesheets

The departmental timesheets add-on provides a different approach to time recording and is designed for organisations where a manager submits timesheets each week (or month) rather than individual employees. In this add-on, firstly the manager creates and submits the timesheet. The timesheet contains one row for each of the employees in their department or team. The timesheet is routed to HR or finance for approval (it is possible to disable this step if preferred). Information regarding approved timesheets is extracted for each pay run and is available for reporting.

Appraisals

The appraisal add-on enables employees and managers to complete appraisal forms via the ESS. This is based on a series of 'appraisal questions'. The 'questions' included in an appraisal form can be pre-defined for a particular job-type (and can be different for each job type). A screen is provided that enables the user to define these 'appraisal questions'. Once the appraisal form is created, employees complete the elements of the appraisal assigned to them, and managers complete the elements of the appraisal assigned to them. It is possible to control the order in which this happens (employee first or manager first, or no order). Once complete, the form is (optionally) passed to HR for final approval. Appraisal information can now be reported on using a selection of reports. Once again, individuals are kept informed by e-mail at various stages during the process.

Further Possible Add-ons

While not yet implemented, a number of additional processes have been identified as suitable for incorporation into an ESS Add-on. These include:

- An add-on to manage the on-boarding process (authorisation to recruit, provision of equipment, management of induction, scheduling of training).
- An add-on that enables managers to participate in the annual pay review process. A screen is provided to create proposed salary records; these records are reviewed by line-managers; proposed salary or bonus figures are adjusted; directors approve the adjusted figures; new salary records are created; employees are notified; reports are provided for analysis.
- An add-on to manage the registration of interest in training courses and provide post training course feedback via an online survey form. Course events are scheduled (using a new screen). Future dates for courses are published; employees submit a request to join a course event; they provide additional details such as dietary requirements; their manager approves the request; delegate records are created. Once the course has taken place an e-mail is sent to all attendees asking them to complete an on-line evaluation form.
- An add-on to enable employees to register overtime and request that this be paid or recorded as time-off-in-lieu.
- An add-on to enable employees to buy and sell holidays (flexible benefits)
- An add-on to enable employees to provide self-certification for sickness records