



Employee Self-Service module

Introduction

The People Inc. Employee Self Service (ESS) module integrates with the People Inc. HR system to provide efficient communication between employees, managers and HR.

Amongst its key benefits, the system enables employees to view their details held within People Inc. and submit holiday requests, expense claims and timesheets. Access is provided via a web browser, from any location at any time, using a computer or mobile device. Customisable access profiles enable administrators to restrict the information that is made available to employees.

Key Features

The ESS module enables employees to submit amendments to particular information held within the system including their address (and other contact details), bank account details, and details of personal contacts (next of kin, doctor, etc.). A full log of these changes is retained by the system and the system can be configured to inform administrators when employee records are updated if desired. These changes can then be passed on electronically to others within the organisation (for example the payroll team).

The ESS also enables an organisation to manage the flow of information submitted by employees for approval. This includes requests to take time off on holiday, the submission of expense claims and timesheets. These requests are normally routed to a manager or supervisor for review or approval before the employee's records are updated. The routing of requests is flexible; requests from a group of employees can be routed to any individual or number of individuals (not just the employee's manager).

It is possible to provide access to attachments held within the People Inc. system via the ESS (for example forms and policies, an employee handbook, the employee's payslips). Furthermore, the system can be configured so that reports can be generated by employees or managers on demand (for example a historical overview of absence within a department). Both of these facilities are likely to reduce the cost of printing and postage (and provide a 'greener' approach to office administration) and speed up the flow of information.

Typically, managers will have access to information about the employees in their team via the ESS. This can help them with resource planning and other management activities. For example, they can enter sickness records directly into the system, or can update on-line appraisal records (rather than use paper-based notes or documents stored on their PC). This speeds up the collection of appraisal details and enables HR to monitor and analyse activity and results quickly and with minimum effort.

Once the ESS is fully implemented and employees and managers are using the system fully, the responsibility for keeping information up-to-date (within People Inc.) is to a degree delegated to employees and line managers. This not only empowers line managers but also means that members of the HR team are no longer tied up with repetitive data-entry and can focus on more productive HR activities.

While it is possible to restrict the scope of the information that is accessible to employees via the ESS (using configurable access profiles), the system provides organisations with an effective way to comply with the requirement specified in the Data Protection Act which gives individuals rights to gain access to all personal information held within a computer-based HR system.

Having put in place processes to manage basic HR information via the ESS, it is then possible to look at further benefits that can be provided by the system. For example, the ESS can be used to help employees to make choices about their development and career planning. Vacancies can be offered internally via the ESS before they are advertised externally (helping to retain staff). Employees can also be more involved in setting their own goals and tasks using ESS screens. This helps to build a culture where employees feel empowered and feel that they really can make a difference.



Customisation

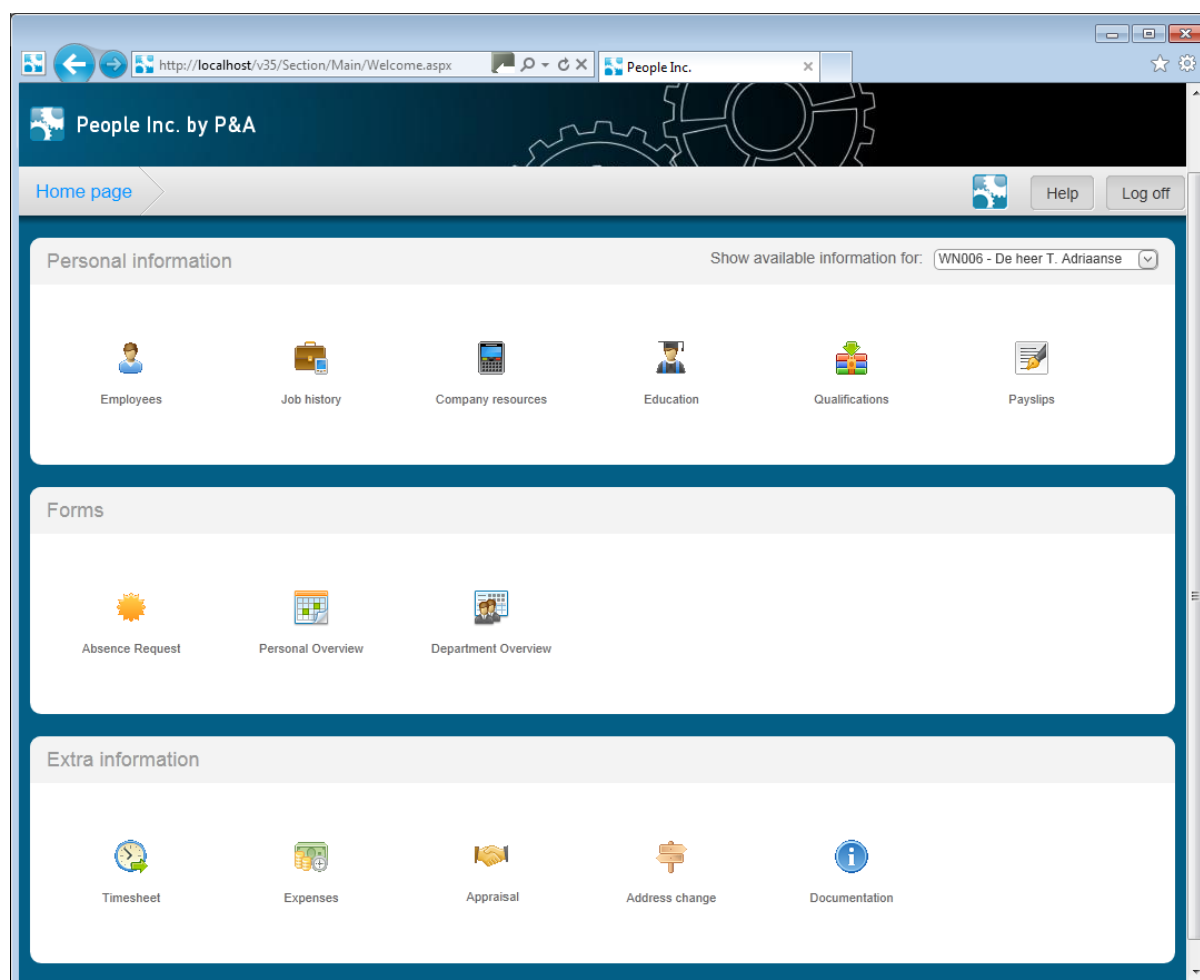
The ESS screens are configurable and customisable. Screens can be developed quickly and easily within the People Inc. system and published to employees and managers via the ESS. This enables users to manage a wide variety of organisation-specific information and to add web-based forms to collect information from employees. For example, a form could be provided to enable employees to opt out of any automatic enrolment in a pension in this way. Once again, this saves on both printing and postage costs, but it also speeds up the time it takes to process the information and means that forms are never 'lost in the post'.

The ESS is most often integrated into an organisation's Intranet. The style adopted by the ESS can be modified so that it matches the organisation's Intranet and logos and other graphics can also be changed. This can be managed by the company's web design team by editing the HTML and CSS that the system already uses.

Employee Self Service - Version 3.5

Version 3.5 of the ESS has a fresh new look and feel. The home page can be configured with a number of panels and the shortcuts displayed in each panel can be defined by the organisation (and different icons used if desired). Different views can be defined for different groups of users (employees, managers and other users). The style of the pages can be changed to match the organisation's brand or corporate style.

Employee Self Service Home Page (example)



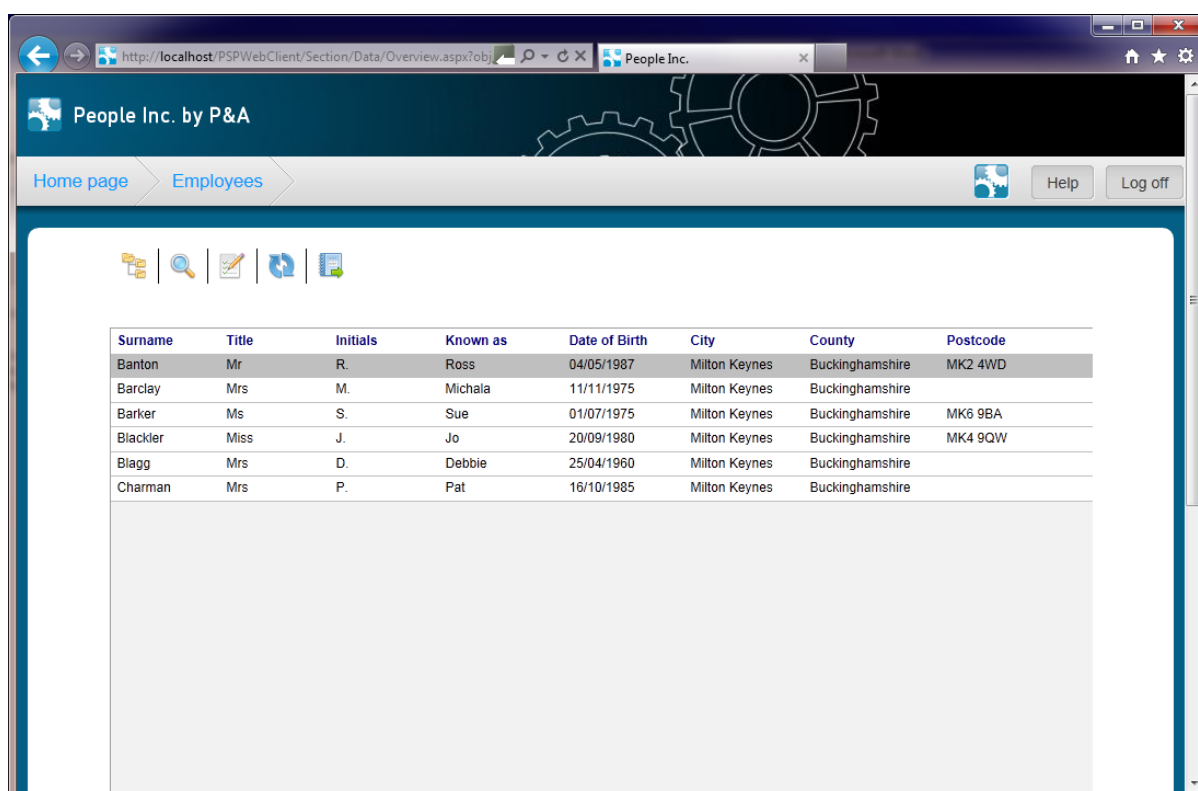
The styling and user interface have been updated for this version of the ESS. The way users access information on the individual data screens is more intuitive than in earlier versions and this makes the system easier to use.



Shortcuts can be added that provide access to any information within the People Inc. system. For example, a shortcut can provide direct access to the employee's training records, medicals, benefits, etc. Shortcuts to external resources (for example other web-based applications, web pages, etc.) can be added to the panels on the home page. This enables organisations to further integrate the Employee Self Service module with other systems published on their Intranet.

Data screens can provide employee/manger access to all information held within the system. Users can add fields to screens and even add new screens as required. Access profiles determine the information that individuals can view and that which they can update themselves. If needed, the screens can also enable employees and managers to access file attachments held within the People Inc. system and run reports (in Adobe PDF and MS Excel format).

Example Data Screen (list of employees)



Surname	Title	Initials	Known as	Date of Birth	City	County	Postcode
Banton	Mr	R.	Ross	04/05/1987	Milton Keynes	Buckinghamshire	MK2 4WD
Barclay	Mrs	M.	Michala	11/11/1975	Milton Keynes	Buckinghamshire	
Barker	Ms	S.	Sue	01/07/1975	Milton Keynes	Buckinghamshire	MK6 9BA
Blackler	Miss	J.	Jo	20/09/1980	Milton Keynes	Buckinghamshire	MK4 9QW
Blagg	Mrs	D.	Debbie	25/04/1960	Milton Keynes	Buckinghamshire	
Charman	Mrs	P.	Pat	16/10/1985	Milton Keynes	Buckinghamshire	



Submitting and Processing Requests

The standard configuration of the ESS provides functionality to enable employees to view details of the holiday they are allowed, and the holiday they have taken. This information is presented in a calendar view (one which covers a full calendar-year for an individual and a group view that enables users to see the absence bookings for their team or department).

Requests are automatically routed to a nominated person (per team) for processing. It is possible to view details of all other absence bookings for employees in each group before requests are approved. Confirmation messages (that a request has been submitted, or that a request has been processed) can be sent automatically to individuals via e-mail by the system.

The absence calendars are interactive; they show details of a particular absence bookings when the mouse hovers over an entry and a drill-down facility enables employees and managers to book or approve absence requests directly from a date-cell on the calendar screen.

Absence summary

Personal absence overview for EMP053 - Mr R. Banton for 2012

	From	Until	Absence units	Entitlement	Taken	Adjustments	Transferred	Of which lost	Remaining
Holiday	01/01/2012	31/12/2012	Days	20.00	13.00	0.00	20.00	17.00	10.00
Sickness	01/01/2012	31/12/2012	Days	0.00	5.00	0.00	0.00	0.00	-5.00
Bank holiday									
Absence request									

Calendar view for 2012 showing absence bookings (yellow cells) and entitlement (blue cells). Total entitlement: 20.00 days. Total taken: 13.00 days. Remaining: 7.00 days.



Workflow Add-ons

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. 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.

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.

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

Distributing Additional Information

Reports defined within People Inc. can be published via the ESS. This enables employees and managers to view a summary of information held in the system and this can be saved as a PDF-format document or exported to MS Excel.