

**Employee Self Service (ESS)
Change Management Document
September 2008**

Introduction

A new version of ESS (Employee Self Service), based on new SAP technology (also known as Webdynpro) will be released shortly.

The new version of ESS will introduce a new 'look and feel' as well as a number of improvements that will make the service easier and simpler to use.

Some of these improvements include:

General Improvements

- Simpler presentation of services
- Improved compatibility for Mac and Firefox although Internet Explorer 7 remains the preferred browser to use with ESS
- Faster navigation with all ESS services available from front page
- Easier entry of dates with calendar controls and the use of normal date formats
- A step by step approach to updating information
- Context sensitive and interactive help

Leave Service Improvements

- The ability to assign a department Leave Manager (which will improve the one-step approval process)
- Access to online Team Calendars that display team and/or direct report absences
- The ability for the applicant to delete pending leave requests; and
- The removal of Tuesday 'lockout' periods during pay week - approved requests will now be queued and processed as soon as the system becomes available.

The purpose of this document is to provide you with further information about these changes.

Additional support information, as well as an interactive Web Based Training application, is available via the ESS Information Website at <http://www.adm.monash.edu.au/ias/ess/online-learning/> .

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1. Getting Around in ESS

1.1 Navigation

The new version of ESS is similar to the old version in that it still displays two menu bars at the top of the screen. In the new version however, these menus have been changed to cater for the future addition of new functionality such as Manager Services (Manager Services will provide access to standard forms and reports).

The new menu structure places all of the ESS services under one top level menu titled *Employee Services*. A second level menu provides access to all individual services via tabs (see Figure 1).



Figure 1: ESS Menus

1.2 Overview Screen

The new first page of ESS is called the *Overview* page. The *Overview* page provides access to all of the services available in *Employee Services* and is divided into four key service areas; Personal Information, Leave Information, Pay Information and Delegations. Below each service heading is a series of 'quick links' that will take users directly to the service of their choice.

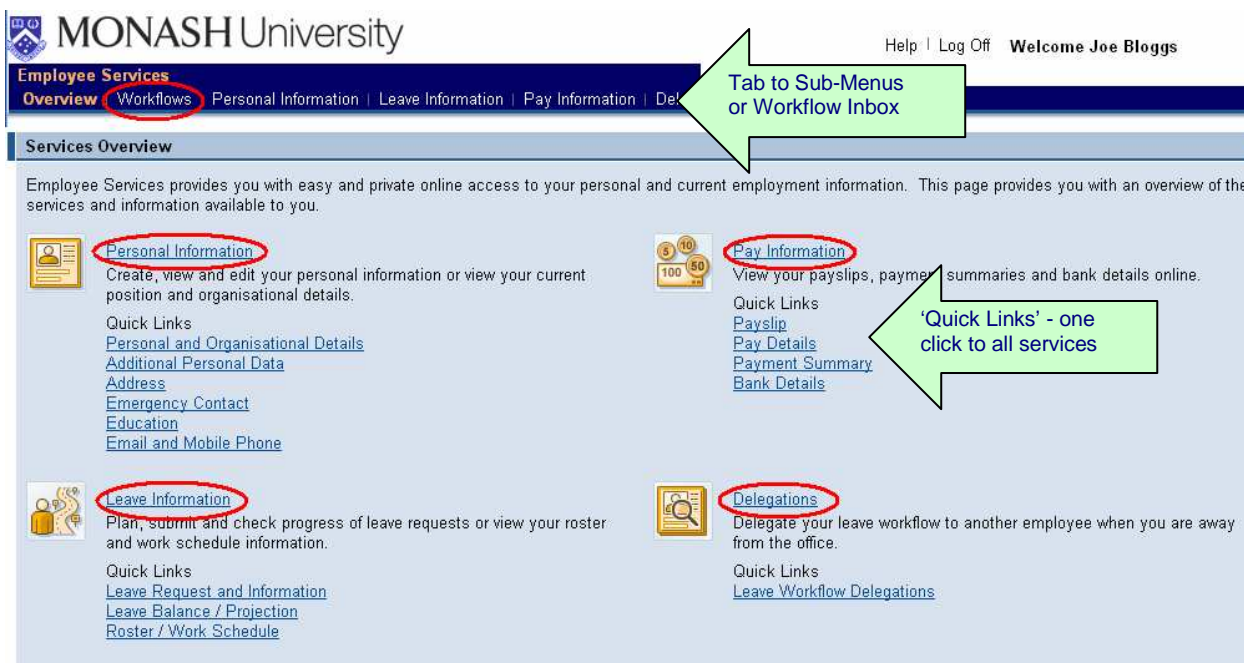


Figure 2: Overview Page

Users may also choose to navigate ESS via the service tab options on the second level menu. Clicking on a tab will open a sub-menu that will display the links relevant to the chosen service (see Figure 3).

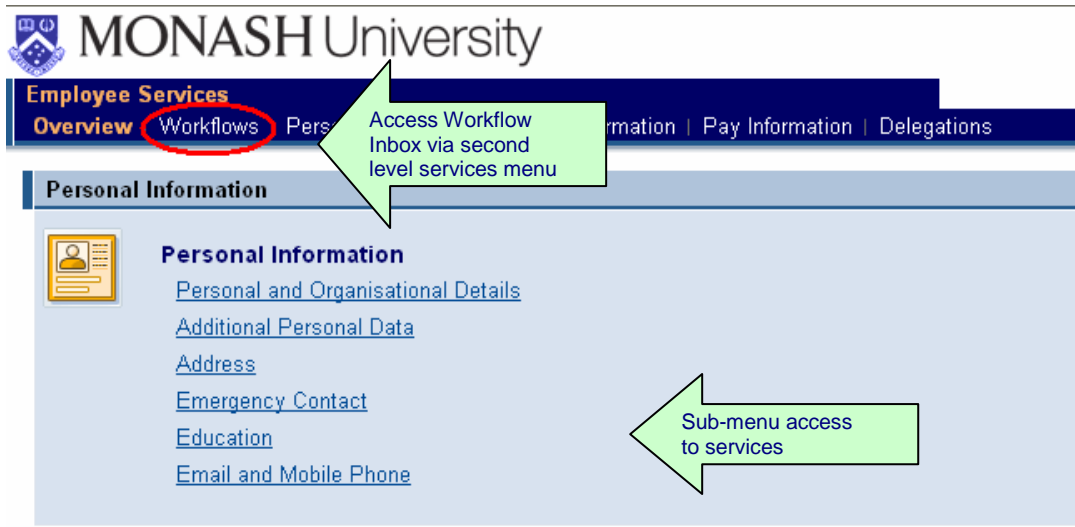


Figure 3: Personal Information Sub Menu

1.3 Workflow Inbox

The Workflow Inbox is located on the second level menu and can be accessed at anytime by clicking on the *Workflows* tab (see Figure 3).

1.4 Returning to the Overview Page

The browser's BACK button does not work within ESS so you will need to use the EXIT button located at the bottom of each screen or the service tabs located at the top of the page to navigate back to the Overview page or other service menu within ESS (see Figure 4).

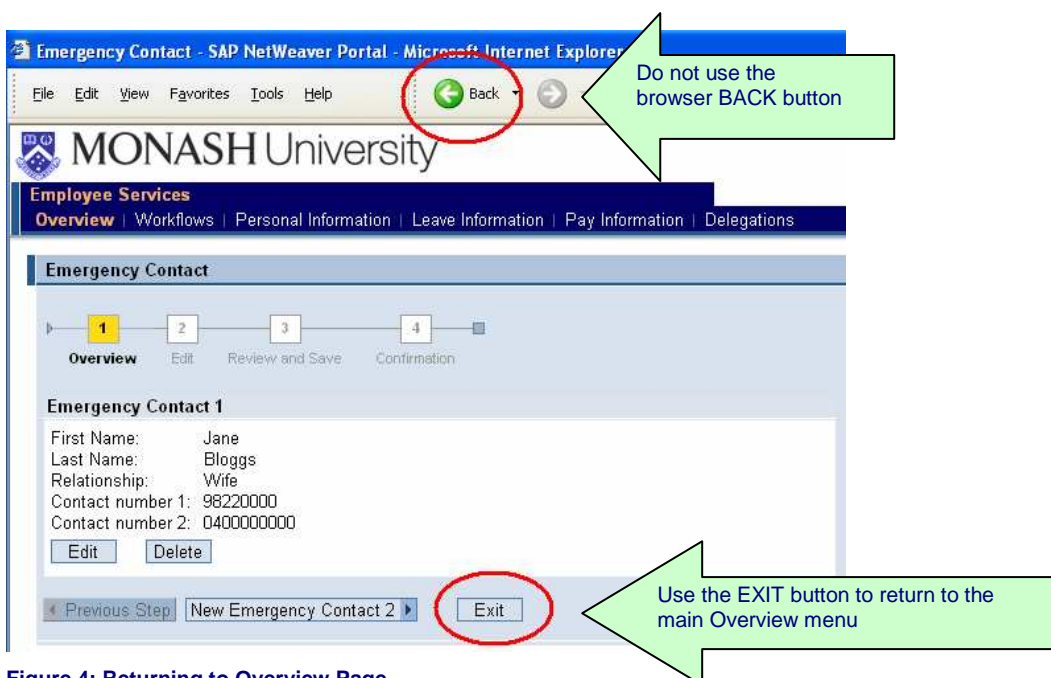


Figure 4: Returning to Overview Page

2. A New ‘Look and Feel’

There have been a number of small changes made to the layout and display of some of the pages within ESS, including the introduction of a new step-by-step approach to updating and verifying information.

2.1 Step-By-Step Guide

The new step-by-step process will guide users through each ESS transaction, ensuring that new entries and requests are checked and verified prior to submitting. This functionality will be particularly useful when more complex transactions are delivered to ESS at a later date.

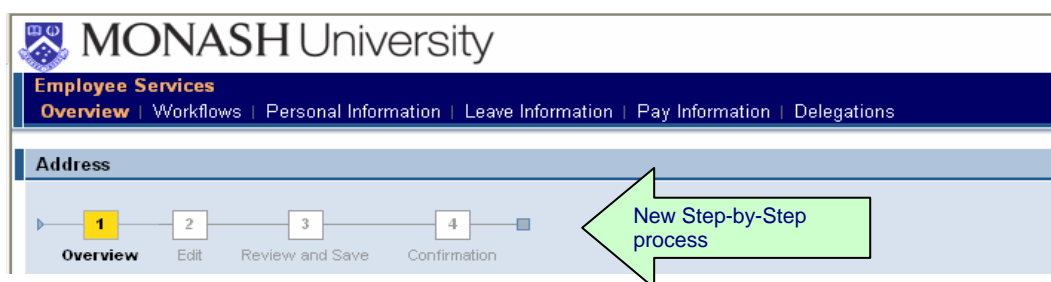


Figure 5: Step by Step Process

It is important to note that users will now be able to move back to a previous step to correct or change the data they have entered (see Figure 6).

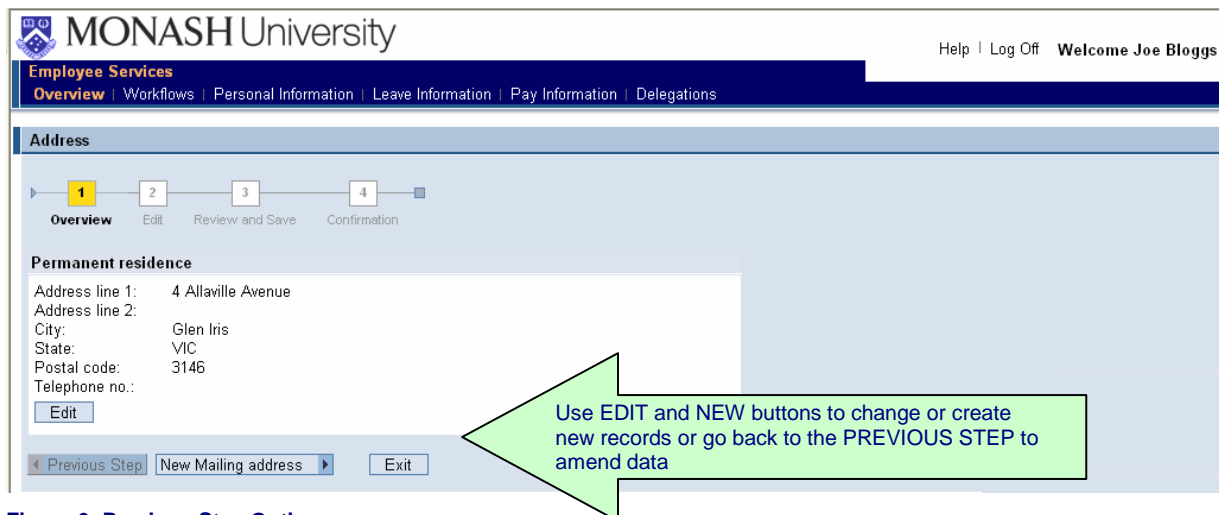


Figure 6: Previous Step Option

2.2 Help on Service

The new *Help on Service* link, available on each service screen, provides a link to context sensitive help information and interactive demonstrations.

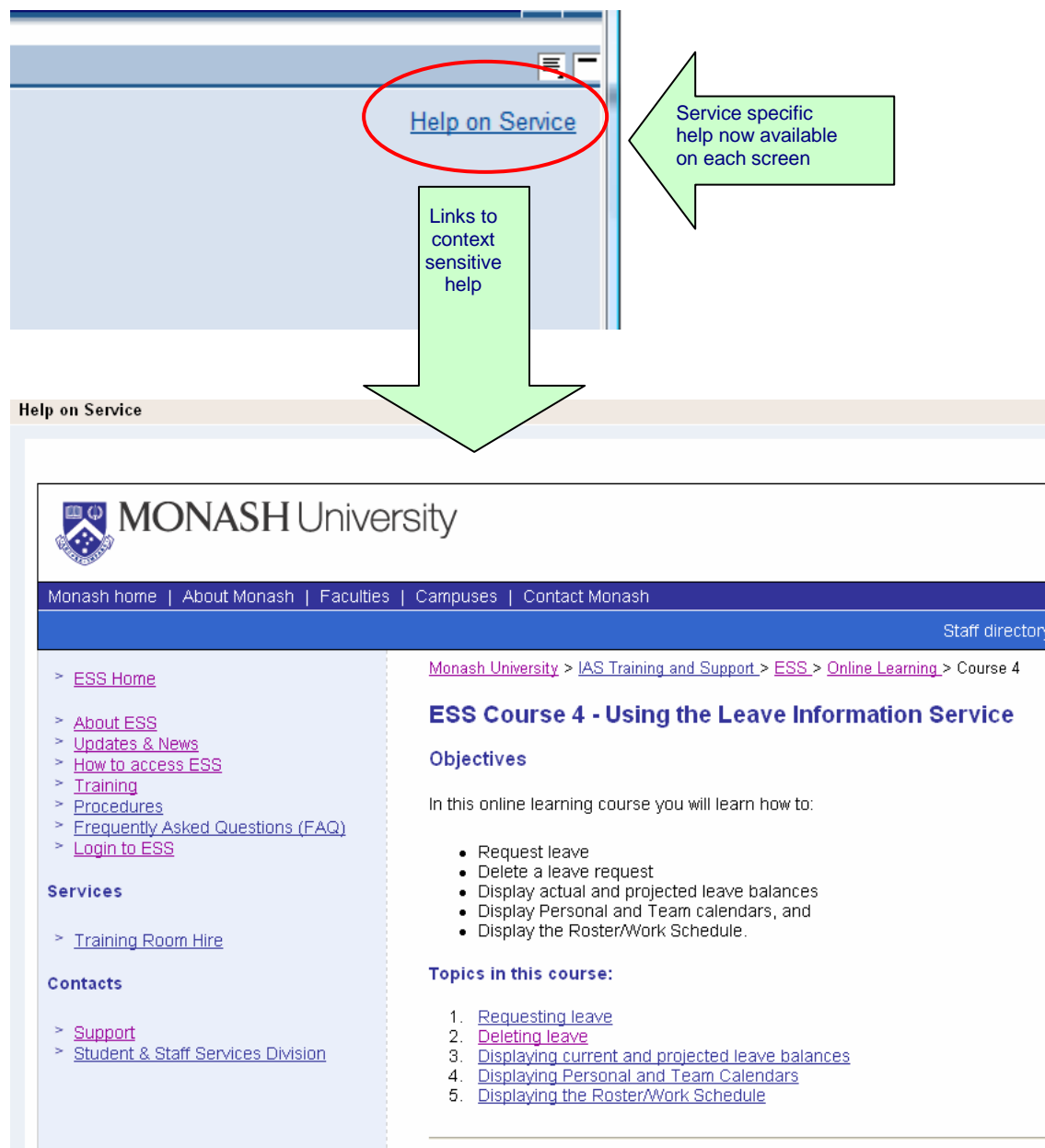


Figure 7: Service specific help

3. Leave Information

3.1 Leave Request and Information Service

The new Leave Request and Information service will enable users to select four different views at the top of the screen and includes; *Show Leave Balances*, *Show Leave Overview*, *Show Calendar* and *Show Team Calendar*. Each view can be selected by clicking on the relevant link at the top of the page (see Figure 8).

3.1.1 Show Leave Balances

This is the first view displayed when entering the Leave Request and Information service. It provides similar information to the old Leave Balances service except that the user will no longer be able to project leave balances using this view. A separate service called *Leave Balances/Projection* is now available from the Overview Page or Leave Information sub-menu.

MONASH University
Employee Services
Overview | Workflows | Personal Information | Leave Information | Pay Information | Delegations

Leave Request and Information

1 Display and Edit | 2 Review and Send | 3 Completed

▼ Hide Leave Balances | ▶ Show Leave Overview | ▶ Show Calendar | ▶ Show Team Calendar

Leave Balance	Balance (Hrs)	Balance (Days)	Future Lve (s)	Bal Inc Fut (Hrs)	Bal Inc Fut (Days)
Annual Leave	42.84	5.91	43.5	0.00	0.09-
Sick Leave	609.30	84.04	0.00	0.00	84.04
LSL	0.00	0.00	0.00	0.00	0.00

Row 1 of 3

To request or report leave, enter the required data and choose Review.

Type of Leave: Annual Leave

Date: 22/04/2008 To 22/04/2008

Duration: 0 Hours

Note for Approver:

Supervisor: Linda Phuong

Authorisers: Linda Phuong, Jackie Thomas

Leave discussed with supervisor
 Appropriate evidence sent to supervisor (eg. sick leave certificate)

Figure 8: Leave Balances View

3.1.2 Show Leave Overview

The *Leave Overview* is similar to the old Leave Overview service and displays a history of leave taken or leave applied for. However, it will no longer display who the leave request is sitting with.

The 'Status' column will indicate 'Sent' for leave recently applied for but not yet taken.

Users can now request cancellation of approved or pending leave by selecting the side button to highlight the relevant record (see Figure 9). This will transfer the leave details to a cancellation request at the bottom of the screen, which the user must then DELETE. In the old version of ESS, a user could not delete a leave request until it had been approved.

MONASH University
Employee Services
Overview | Workflows | Personal Information | Leave Information | Pay Information | Delegations

Leave Request and Information

1 Display and Edit 2 Review and Send 3 Completed

▶ Show Leave Balances ▼ Hide Leave Overview ▶ Show Calendar ▶ Show Team Calendar

Leave Since: 1/01/2008 [calendar icon] [Display]

Type of Leave	From	To	Status	Used
Annual Leave	29/07/2008	29/07/2008	Approved	7.50 Hours
Annual Leave	23/07/2008	24/07/2008	Approved	11 Hours
Annual Leave	16/07/2008	18/07/2008	Approved	18.50 Hours
Leave Loading Substituti	1/01/2008			50 Hours
Sick Leave w/out Cert.				50 Hours

Row 1 of 6

Submit New Request

You have selected the following leave:

Type of Leave: Sick Leave w/out Cert.
 Date: 16/01/2008 [calendar icon]
 Duration: 5.5 Hours
 Supervisor: _____
 Authorisers: _____

Leave discussed with supervisor
 Appropriate evidence sent to supervisor (eg. sick leave certificate)

◀ Previous Step **Delete** Cancel

Figure 9: Leave Overview and Cancellation

3.1.3 Calendar View

This view displays absences, leave taken or leave applied for in a 3 monthly calendar view (see Figure 10). It is also possible to delete approved or pending leave from this screen by clicking directly on the dates. This will transfer the details of the leave request into a cancellation form at the bottom of the screen and then click DELETE to cancel the request.

MONASH University
Employee Services
Overview | Workflows | Personal Information | **Leave Information** | Pay Information | Delegations

Leave Request and Information

1 Display and Edit 2 Review and Send 3 Completed

▶ Show Leave Balance Hide Calendar ▶ Show Team Calendar

July 2008 August 2008 September 2008

Legend: Absent (blue), Multiple Entries (light blue), Sent (pink), Deletion Requested (red)

Submit New Request

You have selected the following leave:

Type of Leave: Annual Leave
Date: 23/07/2008 To 24/07/2008
Duration: 11 Hours
Supervisor: _____
Authorisers: _____

Leave discussed with supervisor
 Appropriate evidence sent to supervisor (eg. sick leave certificate)

◀ Previous Step **Delete** Cancel

Click DELETE to confirm leave cancellation

Figure 10: Calendar View

3.1.4 Team Calendar View

The *Team Calendar* view allows users to see when other staff members within their organisational unit are taking leave in a monthly view (see Figure 11). Note that Supervisors have additional access to a 'Direct Report' view – this is referred to later in Section 4.2.

MONASH University
Employee Services
 Overview | Workflows | Personal Information | Leave Information | Pay Information | Delegations

Leave Request and Information

1 **Display and Edit** | 2 Review and Send | 3 Completed

▶ Show Leave Balances | ▶ Show Leave Overview | ▶ Show Calendar | ◻ Hide Team Calendar

Display Data for: April in: 2008 Go

	2008 April																					
	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tu
	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22
Ms Jane Kiddell																						
Mrs Josephine Penn																						
A Assoc Prof Linda Phuong																						
McCarthy Julie																						
Patterson Linda																						
phuong test dy																						
Plume John																						
Sessional Academic																						
Ms Susan Cruise																						
Thomas Jackie																						

Absent
 Multiple Entries
 Sent
 Deletion Req.

Page 2/3 Go to

To request or report leave, enter the required data and choose Review.

Type of Leave: Annual Leave

Date: 22/04/2008 To 22/04/2008

Duration: 0 Hours

Figure 11: Team Calendar View

3.2 Simple Calendar Controls

The new *Leave Request and Information Service* includes simple calendar controls for entry of leave dates and will accept normal date formatting of DD/MM/YYYY.

To request or report leave, enter the required data and choose Review.

Type of Leave: Annual Leave

Date: 22/04/2008 To: 22/04/2008

Duration: [Calendar for April 2008]

Note for Approver: [Text field]

Supervisor: [Text field]

Authorisers: [Text field]

Access to simple calendar drop down box or manual entry of DD/MM/YYYY

Figure 12: Calendar Controls

3.3 Applying for Less than a Full Day of Leave

The *start* and *end* time fields for entering leave for less than a full day have been removed as they caused confusion due to the format and flexible work schedules at the University. Now, to enter leave for less than a full day, only the absence hours need to be entered into the duration field. Note that hours need to be entered in decimal hour format (ie. 1.25 for one hour and 15 minutes or 3.5 for three hours and thirty minutes).

To request or report leave, enter the required data and choose Review.

Type of Leave: Annual Leave

Date: 5/08/2008 To: 5/08/2008

Duration: 3.5 Hours

Note for Approver: [Text field]

Supervisor: [Text field]

Authorisers: [Text field]

Leave discussed with supervisor

Appropriate evidence sent to supervisor (eg. sick leave certificate)

Previous Step Review Cancel

Duration field needs to be completed for less than a full days leave and hours should be entered in decimal hours

REVIEW step replaces the calculate button

Figure 13: Applying for Less than a Full Day of Leave

3.4 Review Button to Calculate Leave

The *Leave Request and Information Service* now follows a step-by-step process and includes a 'Review' step instead of the old 'Calculate' button. The 'Review' step provides an opportunity for the user to go backwards and forwards between screens to change or amend data prior to submitting the final request (see Figure 13).

3.5 Negative Annual Leave Balance

The *Leave Request and Information Service* will now allow users to apply for Annual Leave in advance of it being accrued. Users will only be able to apply for a maximum of 20 full-time days in advance of their accrual. Supervisors will be warned of the negative leave balance during the approval process (see Figure 14).

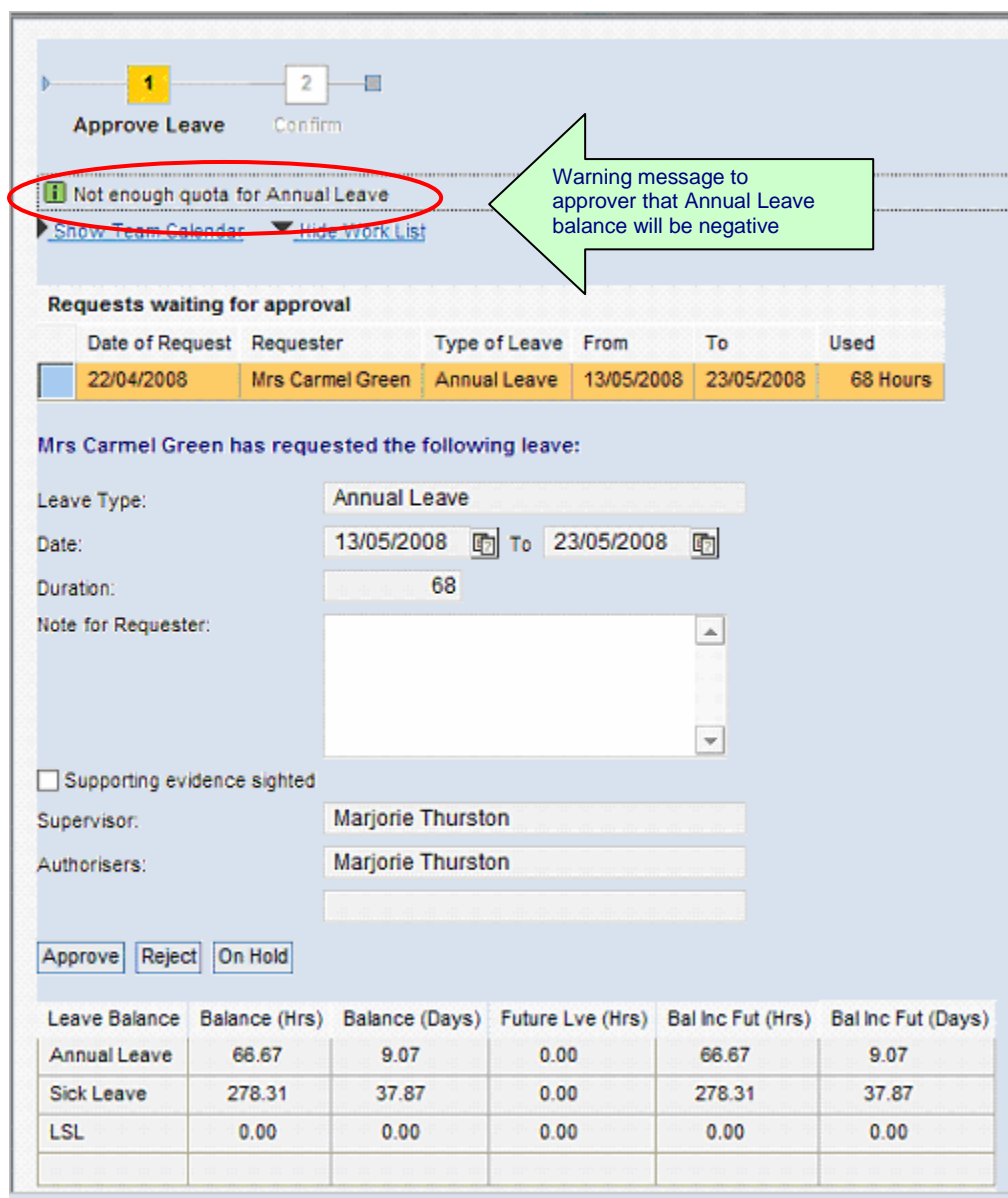


Figure 14: Negative Annual Leave Balance

4. Changes to Leave Approvals and Workflows

4.1 Workflow Inbox

The *Workflow Inbox* has been improved by including a due date column and details of the transaction. Transaction details can be seen below the Inbox table containing work items (see Figure 15). This allows the approver to look at the details of the transaction prior to accessing the approval screen.

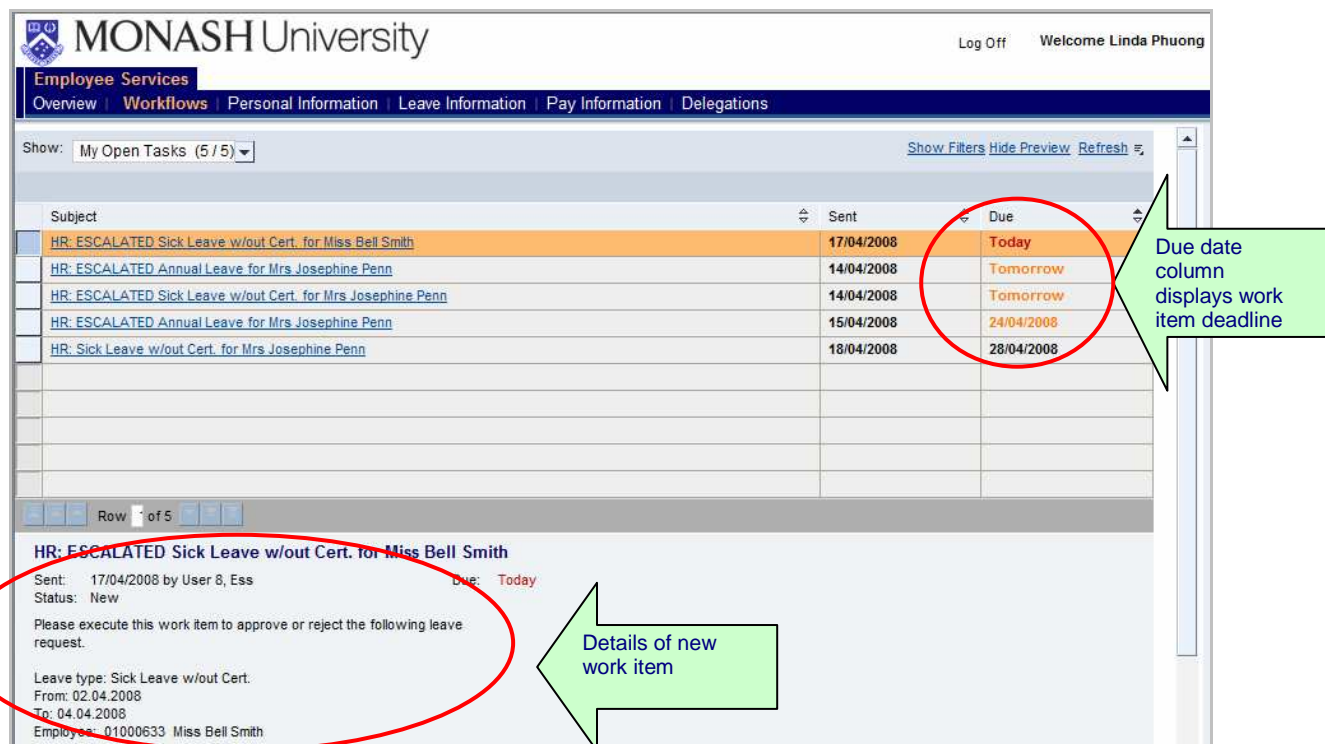


Figure 15: Workflow Inbox

There is also the added ability to see details of previously completed work items by changing the option under the SHOW field (see Figure 16).

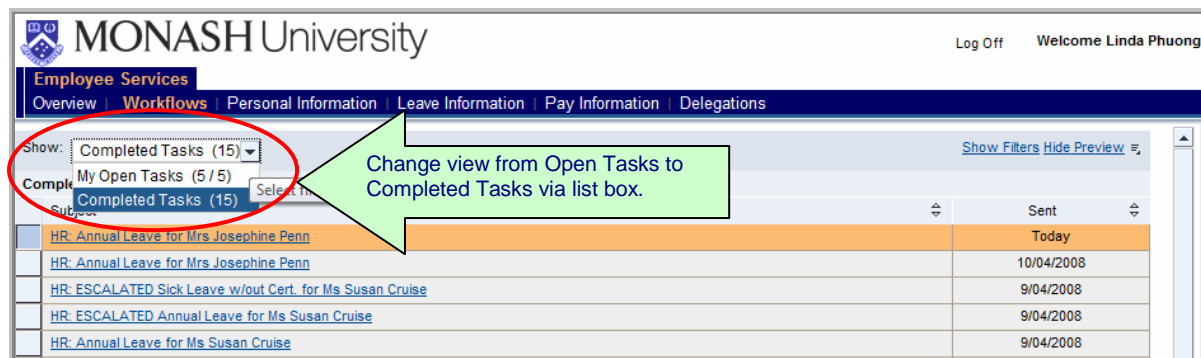


Figure 16: Changing Views in Workflow Inbox

4.2 Team Calendar View for Supervisors

A new feature to assist Supervisors managing Leave Requests is the ability to view a team calendar that displays *'direct reports'* only.

When a Supervisor opens a Leave Request in the *Workflow Inbox* and selects *Show Team Calendar* option, they are able to choose to display *'Direct Reports'* or *'All Employees'* from their organisational unit from the DISPLAY DATA list box (see Figure 17).

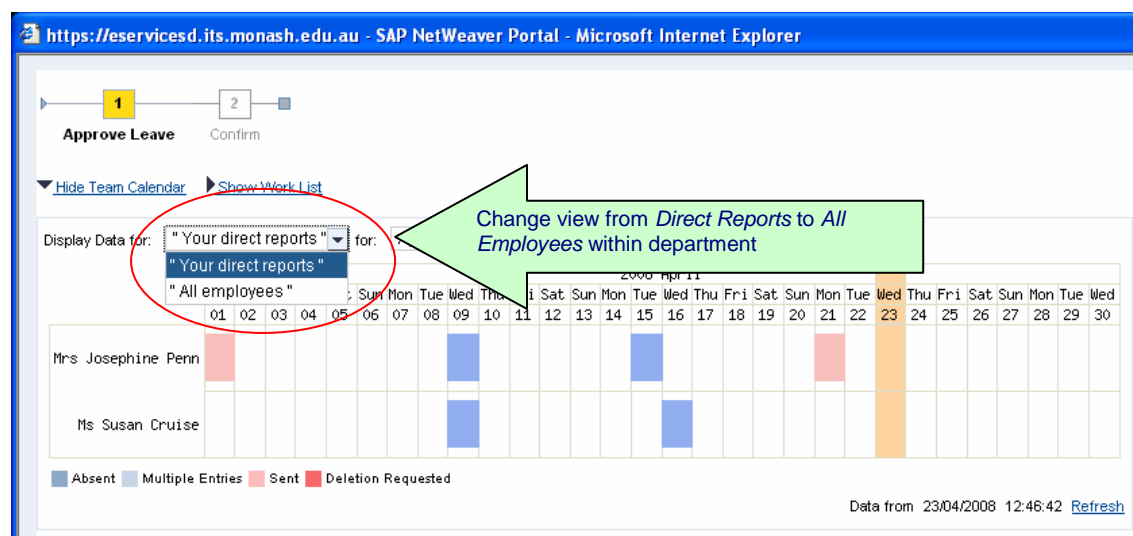


Figure 17: Supervisors Team Calendar View

4.3 Leave Manager Role for Escalations

The leave approval process has been improved by adding a Leave Manager role for escalations (see Process Tables Appendix I). The purpose of the Leave Manager is to follow-up or action escalated Leave Requests.

This new feature will benefit departments that have adopted a 'one-step' approval process as escalated Leave Requests will now only escalate to the Leave Manager and will no longer be forwarded to ALL Authorisers within the department. Additionally, the work item will remain in the Supervisors inbox and can still be actioned.

If a department chooses not to elect a Leave Manager, the leave workflow will operate as it did before.

4.4 Workflow Escalation for Supervisor

The initial workflow escalation point for a Supervisor has been increased from 3 working days to 5 working days after the Leave Request has been submitted. This gives the Supervisor at least 4 full working days after receiving the HR work item email to approve or reject the request.

4.5 Leave Approvals during Payroll Process Period

Approvals can now be done while the payroll process is running. This makes the approval process available at anytime and approvers will no longer be prevented from approving leave every second Tuesday morning.

5. Changes to Other Services

5.1 Email and Mobile Phone Service

A new service has been added to capture your mobile phone number and private email address. This information will be used by the University to contact you in a crisis situation (see Figure 19). This service has been available in the old version of ESS since February 2008.

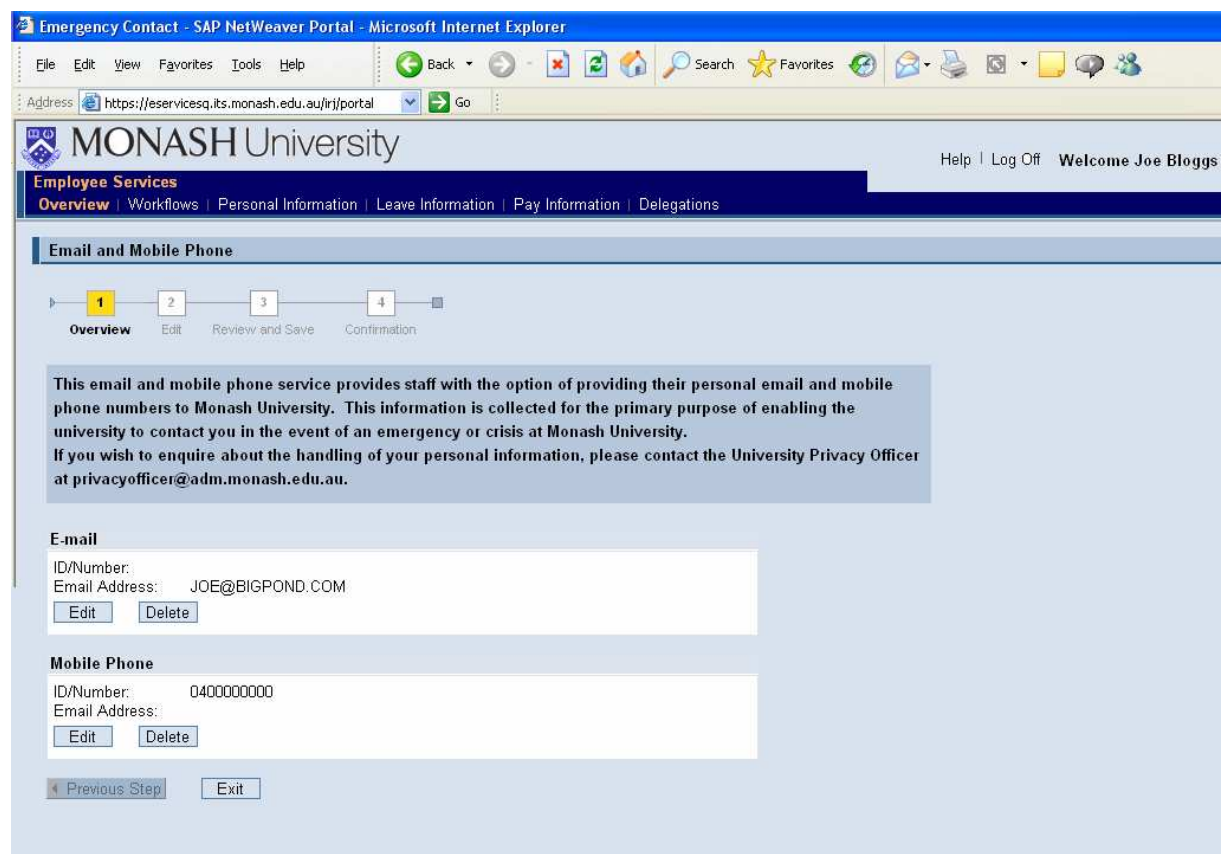


Figure 19: Email and Mobile Phone Service

5.2 Paper Payslip Option

The Paper Payslip Option is no longer available in the new ESS. If you have a legitimate reason for receiving a paper payslip, you must now submit a request in writing to HR Operations.

5.3 Leave Balance/Projection Service

The *Leave Balance/Projection Service* permits users to view leave balances up to 4 months in the future (see Figure 20). This limitation may be lifted or increased when a solution is presented that does not affect system performance.

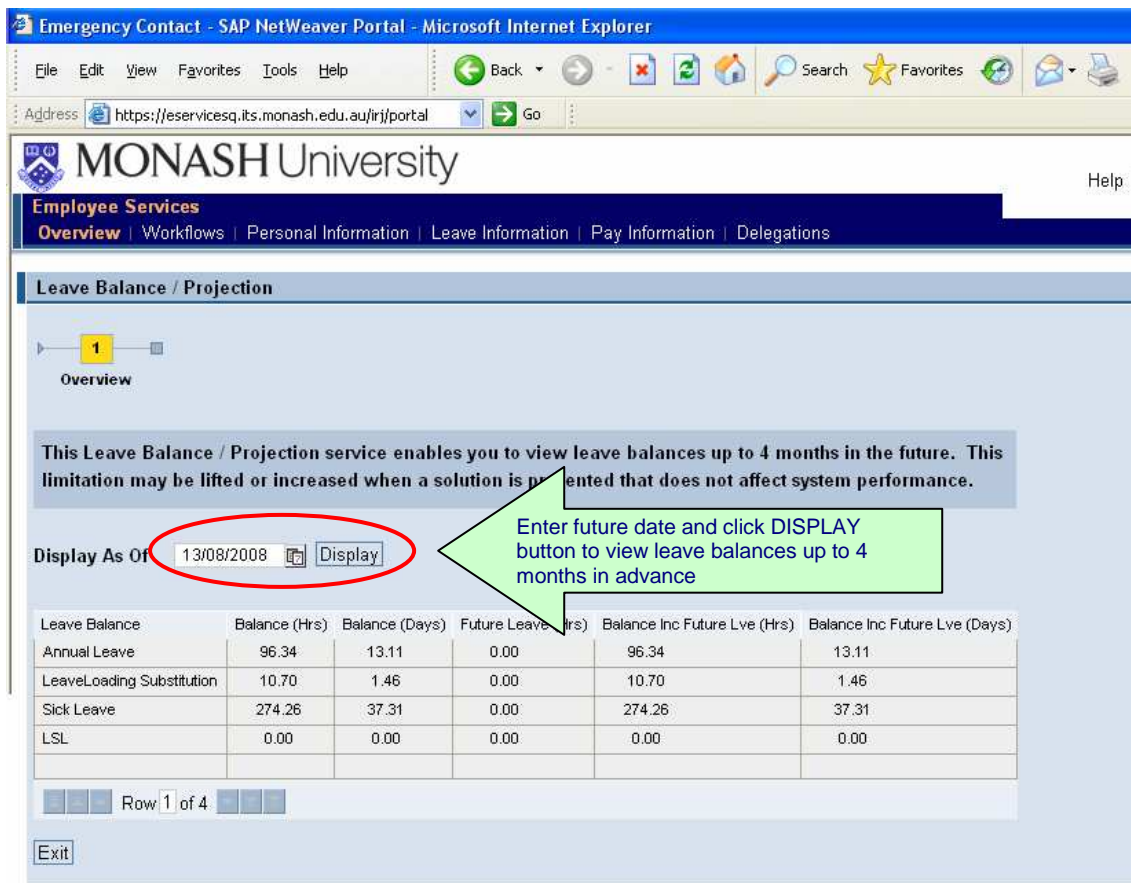


Figure 20: Leave Balance/Projection

5.4 Roster/Work Schedule Service

The *Roster/Work Schedule Service* has been simplified to one simple screen that displays your planned working time (see Figure 21). This is particularly useful for part-time staff to ensure their roster is set up correctly in the SAP HR System. The roster determines how leave is deducted when an absence is taken or applied for, so it is important that this is correct.

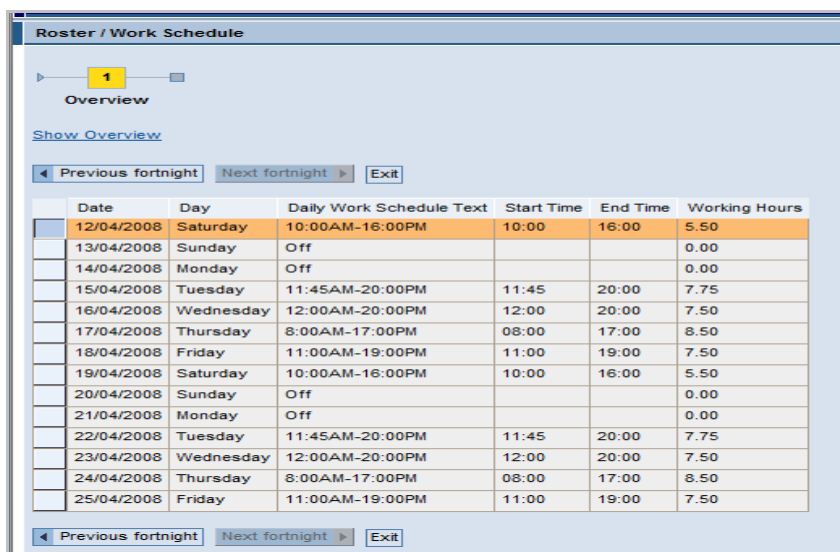


Figure 21: Roster/Work Schedule

6. Help and Support

6.1 Web Based Training (WBT)

A range of new Web Based Training (WBT) modules have been developed to interactively demonstrate each of the key ESS services. The WBT can be accessed directly from within each ESS service through the *Help on Service* link (see Figure 22).

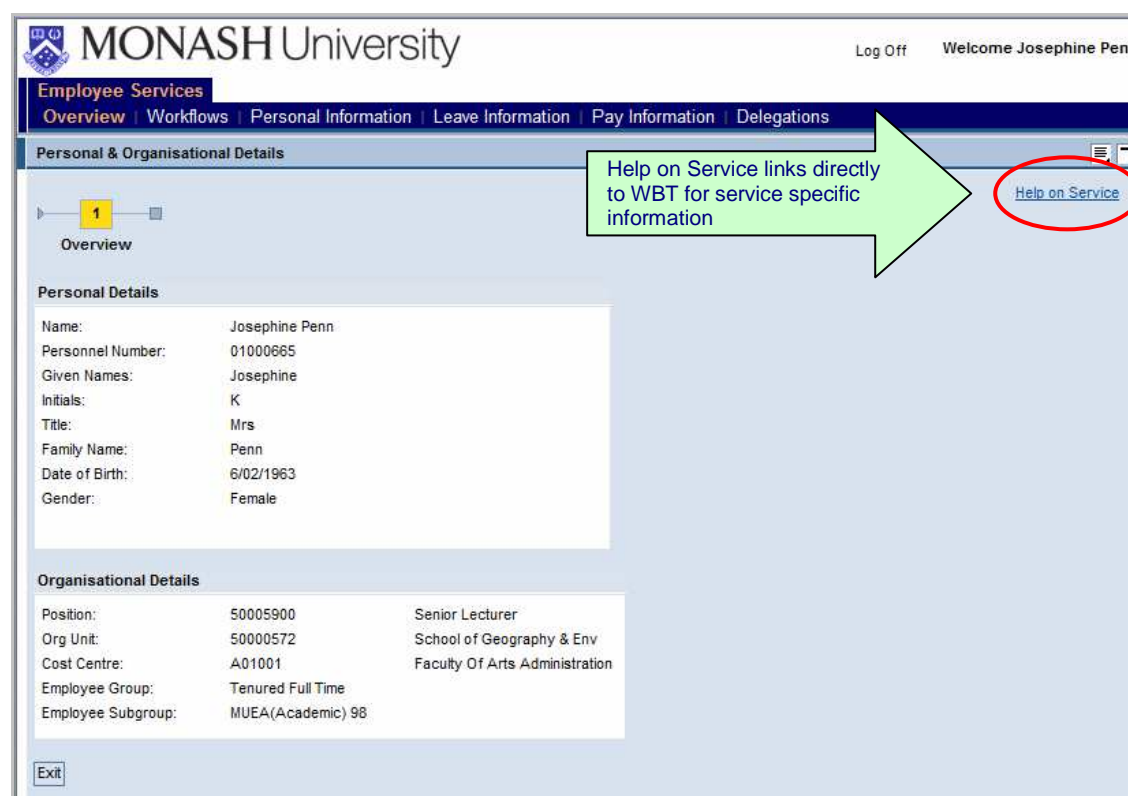


Figure 22: Help Service

The full WBT can be accessed from the ESS Information Website at <http://www.adm.monash.edu.au/ias.ess/online-learning>

6.2 Browser Compatibility

Internet Explorer 7 remains the preferred browser to use with ESS, however the new version of ESS will work with Firefox 2.0 in Windows. Please refer to the *browser settings* information on the [ESS Information Website](#) if you are using Firefox.

Intel MAC users can display PDFs as a pop-up but not within the Firefox browser. This is due to incompatibility with the MAC version of the Adobe Acrobat plug-in.

PowerPC MAC users can display PDFs as a pop-up or within the Firefox browser by installing a plug-in which can be downloaded from the [ESS Information Website](#) under 'About ESS'.

6.3 Date Display in Firefox 2.0x

Note that your browser settings may effect how dates are displayed in ESS. If the day and month are transposed you will need to change the browser settings:

1. Open Firefox and select Options from the Tools menu
2. Select the Advanced icon and then click on the General Tab
3. In the Language section click the Choose button
4. In the 'Languages in order of preference' box you need to move the English/Australia [en-au] option to the top of the list by using the Move Up or Move Down buttons
5. If English/Australia is not available, click on "Select a language to add" and select English/Australia [en-au] and repeat step 4 to move it to the top of the list.
6. Click on OK once complete
7. Log off and restart Firefox before attempting to use ESS again

6.4 Version Release - Known Issues

This release of ESS has some known issues that were introduced after critical patches were applied at the end of the 2007/2008 financial year in June. These issues have been referred back to the vendor and include:

1. White border around the inner page
2. Payment Summary screen can take up to 10 seconds to return information
3. Alignment of certain fields have changed

7. Summary of Changes

General Information

- The Bank Details service has been removed from the Personal Information service and can now be located in the Pay Information service.
- The browser BACK button does not work in ESS, use the EXIT button or Service Tabs.
- Users can now move backwards and forwards between screens to check and verify data
- Users can now delete pending leave requests
- Dates can now be entered as DD/MM/YYYY
- If taking less than one days leave, enter the hours taken only (in decimal hour format)
- Users can now apply for up to 20 days of leave in advance of it being accrued
- Context sensitive help available from each service screen
- Leave projection is now available via the Leave Balances/Projection service
- Team Calendar view allows users to see when other team members are taking leave
- Payslip option no longer available – requests for paper payslip must be submitted in writing to HR Operations
- Improved browser compatibility
- Payment Summary screen can take up to 10 seconds to return information

Workflow Improvements

- Access your Workflow Inbox via second level service menu (tab)
- Supervisors can now view team calendar for 'direct reports' or all staff within department
- Due date column added to Workflow Inbox
- Supervisors can now view previously completed work items
- Leave Manager role now available for escalations
- Supervisors can still see work item in inbox after escalation
- The removal of Tuesday 'lockout' periods during pay week - approved requests will now be queued and processed as soon as the system becomes available.

Appendix I

ESS Leave Models

1 Step Approval

<p>Standard application without impact of Leave Manager role:</p> <ol style="list-style-type: none"> 1. Applicant submits leave request 2. Request actioned by Supervisor 3. Leave record updated in SAP 4. Applicant receives notification that leave has been actioned <p>Escalated application where Supervisor does not respond:</p>	
Without Leave Manager	With Leave Manager
<ol style="list-style-type: none"> 1. Applicant submits leave request 2. Supervisor does nothing 3. After 5 working days, request is re-sent to Supervisor and ALL Authorisers listed from Supervisor's org unit 4. If request is actioned, leave record is updated in SAP and staff receives notification 5. If request is not actioned, after 7 working days a reminder is sent to Supervisor, ALL Authorisers and Applicant 6. If request is still not actioned after another 3 working days, the request is considered 'stale' and is removed from the system. Applicant is advised accordingly and must re-apply 	<ol style="list-style-type: none"> 1. Applicant submits leave request 2. Supervisor does nothing 3. After 5 working days, request is re-sent to Supervisor and Leave Manager listed from Supervisor's org unit 4. If request is actioned, leave record is updated in SAP and staff receives notification 5. If request is not actioned, after 7 working days a reminder is sent to Supervisor, Leave Manager and Applicant 6. If request is still not actioned after another 3 working days, the request is considered 'stale' and is removed from the system. Applicant is advised accordingly and must re-apply

2 Step Approvals

<p>Standard application without impact of Leave Manager role:</p> <ol style="list-style-type: none"> 1. Applicant submits leave request 2. Request actioned by Supervisor 3. Request sent to Authoriser(s) listed from Supervisor's org unit 4. Request actioned by one of the Authoriser(s) 5. Leave record updated in SAP 6. Applicant receives notification that leave has been actioned <p>Escalated application where Supervisor/Authoriser does not respond:</p>	
Without Leave Manager	With Leave Manager
<ol style="list-style-type: none"> 1. Applicant submits leave request 2. If Supervisor approves, request is sent to Authoriser(s) listed from Supervisor's org unit 3. If Supervisor does nothing, after 5 working days, request is escalated to Authoriser(s) listed from Supervisor's org unit 4. If request is actioned, leave record is updated in SAP and staff receives notification 5. If request is not actioned, after 7 working days a reminder is sent to Authoriser(s) and Applicant 6. If request is still not actioned after another 3 working days, the request is considered 'stale' and is removed from the system. Applicant is advised accordingly and must re-apply 	<ol style="list-style-type: none"> 1. Applicant submits leave request 2. If Supervisor approves, request is sent to Authoriser(s) listed from Supervisor's org unit 3. If Supervisor does nothing, after 5 working days, request is escalated to Authoriser(s) listed from Supervisor's org unit 4. If request is actioned, leave record is updated in SAP and staff receives notification 5. If request is not actioned, after 7 working days a reminder is sent to Authoriser(s) and Applicant and request is also escalated to Leave Manager 6. If request is still not actioned after another 5 working days, the request is considered 'stale' and is removed from the system. Applicant is advised accordingly and must re-apply