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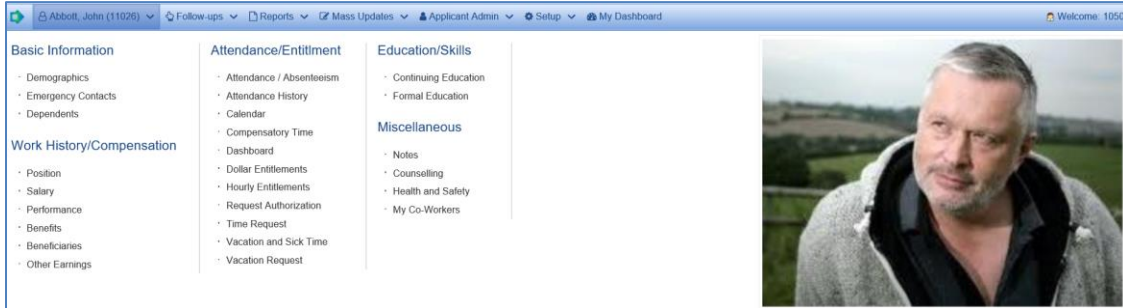
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General Information

Menu Line

The Menu Line (in blue) contains:

1. Headers for all areas of the system the employee has access to according to their security profile. When a heading is clicked on more options will appear in a drop-down. For example:



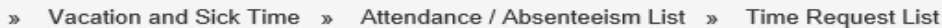
2. Which employee is currently being viewed? If a picture is loaded into info:HR, an icon of the photo can be mouse-over to enlarge the photo.
3. 'My Dashboard' displays entitlement and compensatory time information. The employee can mouse-over the 'My Dashboard' link to view the pop-up. The details in the pop-up are controlled via the administrator, using info:HR. To close the pop-up, click on the 'My Dashboard' link.
4. 'My Schedule' displays the employee's Work Schedule as defined in info:HR. If the employee does not have a Work Schedule, this item is hidden from the user.
5. A picture, if found in info:HR, of the Login User ID. Placing the mouse over the picture will enlarge it.
6. The rightmost corner of the Menu shows the login user's ID.



Breadcrumb Line

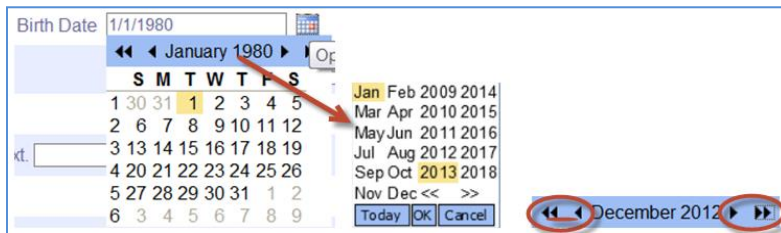
The Breadcrumb line (in grey) is located below the Menu line and displays:

1. The 'path' taken by the user. It can be used to navigate back to a particular screen by clicking on the item. This bar will display all screens you have viewed during your session and will be refreshed upon your next log in.



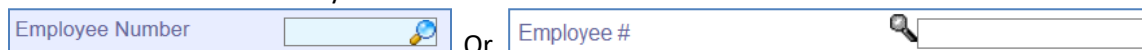
Date Lookups

Any field that requires a date to be entered must use the date icon (📅) to pick a date from the pop-up. Dates cannot be manually entered into the application. By clicking on the "Month Year", you can navigate quickly across months and years. Once you've selected the Month and Year, click on **OK** and pick the day of the month needed. The right or left single/double arrow keys will increase or decrease the month.



Employee Lookups (Reports and Forms)

Click on the magnify class to pop up a screen showing the list of active employees. An employee number cannot be manually entered into the field.

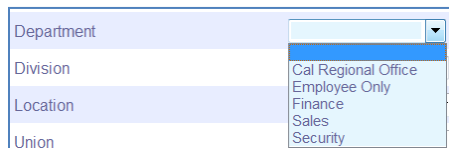


The image shows a search bar with two input fields. The first field is labeled 'Employee Number' and has a magnifying glass icon to its right. The second field is labeled 'Employee #' and also has a magnifying glass icon to its right. The two fields are separated by the word 'Or'.

To search by employee, type in a partial surname or first name. A list of matching employees are displayed.

Drop-Down Lists

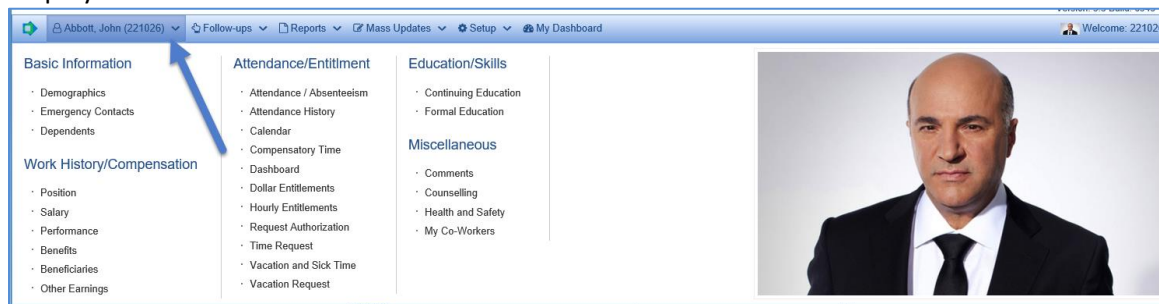
Click on the drop-down arrow and select one of the values listed. Only one value may be selected at a time.



The image shows a form with several fields: 'Department', 'Division', 'Location', and 'Union'. The 'Department' field has a drop-down arrow and a list of options is displayed: 'Cal Regional Office', 'Employee Only', 'Finance', 'Sales', and 'Security'.

Employee Photos

The employee's photo will appear on each employee-specific page. To expand the photo, Click on the employee name on the left of the menu bar.

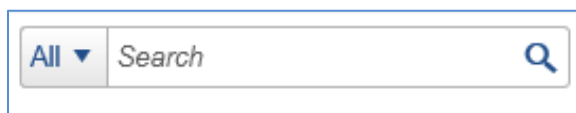


The image shows a screenshot of an employee record page for John Abbott (221026). The page has a navigation bar at the top with tabs for 'Follow-ups', 'Reports', 'Mass Updates', 'Setup', and 'My Dashboard'. The main content area is divided into three columns: 'Basic Information', 'Attendance/Entitlement', and 'Education/Skills'. A blue arrow points to the 'Abbott, John (221026)' dropdown menu in the navigation bar. To the right of the columns is a large photo of John Abbott.

Search Employees

To search for an employee, you can click the All drop-down beside the search bar to see a list of all employees you have access to in the system. Click on the employee's name and then the magnify glass icon to view their record. Alternatively, you can type the partial or full first or last name of the employee in the search field to select the desired employee from a list.

The Employee Search is located in the top right-hand corner of your screen. This field will be available in all screens except Reports.



The image shows a search bar with a dropdown menu on the left labeled 'All' and a magnifying glass icon on the right. The text 'Search' is visible in the input field.

My Dashboard

When My Dashboard is mouse over a popup window will display all the Entitlement balances for the selected employee. To close the popup, click My Dashboard again.

Comp Time Outstanding

Compensatory Balance	10.00 hours
----------------------	-------------

Vacation Outstanding

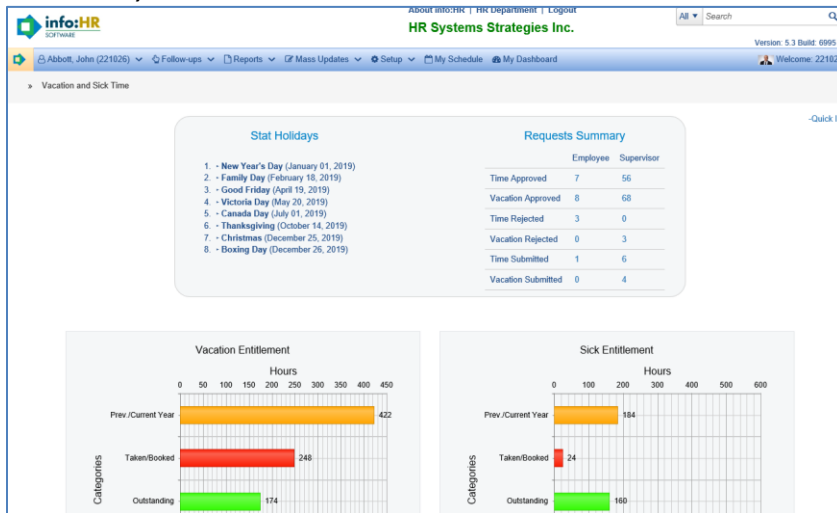
Outstanding	214.00 hours
-------------	--------------

Hourly Entitlement Outstanding (By Reason/Date)

Reason	From Date	To Date	Outstanding
Sick Time Taken	18/5/2018	18/5/2018	10.00 hours
Conference	8/18/2015	8/18/2015	8.00 hours
Client Visit	8/4/2015	8/5/2015	8.00 hours
Overtime Taken	3/27/2015	3/27/2015	3.00 hours
Conference	3/13/2015	3/13/2015	3.00 hours
Family Sick Time	3/18/2015	3/18/2015	1.00 hours
Late	3/18/2015	3/18/2015	1.00 hours
Overtime Banked	3/2/2015	3/2/2015	2.00 hours
Medical Appointment	2/11/2015	2/11/2015	8.00 hours

+Quick Info

When the Quick Info link is clicked a list of Stat Holidays and a Request Summary is displayed for the selected employee. *Note: Stat Holidays must be set up in the Holiday Master in info:HR to enable the Stat Holiday Calendar.*

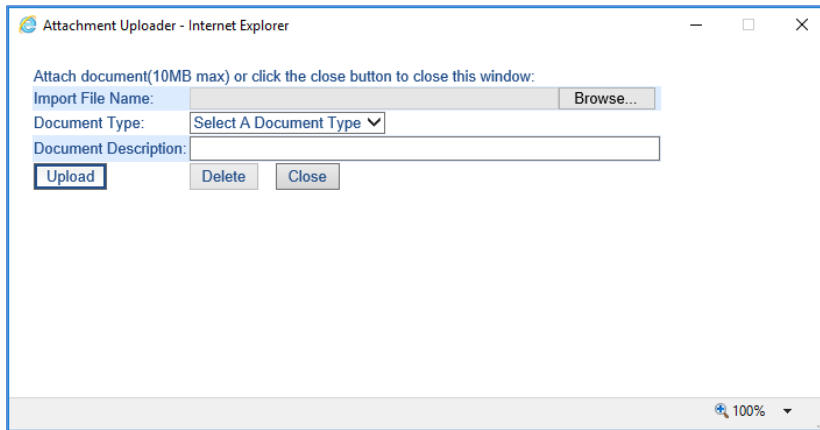


Importing Documents

Documents can be imported into the following pages:

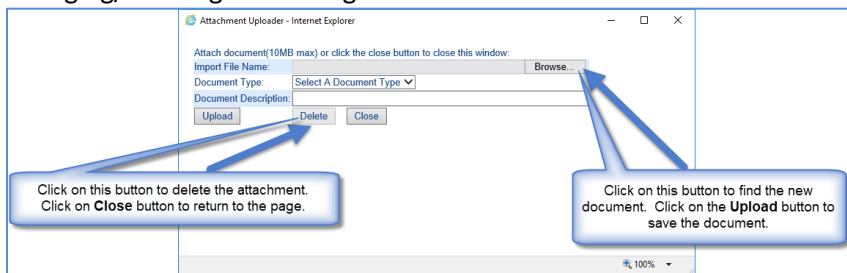
Demographics	current resume
Position	all job offers
Performance	all performance reviews
Continuing Education	one for each course
Formal Education	one for each line displayed
Comments	one for each line displayed
Counseling	one for each line displayed
Health & Safety	one for each line displayed

The employee's security profile must be set to "Maintain" for the page in question to import, change or delete a document. To import a document, click on the "Import" button. The following box will appear:



- Click on **Browse** to find the document. You will then be able to select the drive and folder.
- Once you have the file name and path, click **Upload**. The document will be uploaded and the page will re-appear.
- The employee, manager, and HR will be able to view this document.

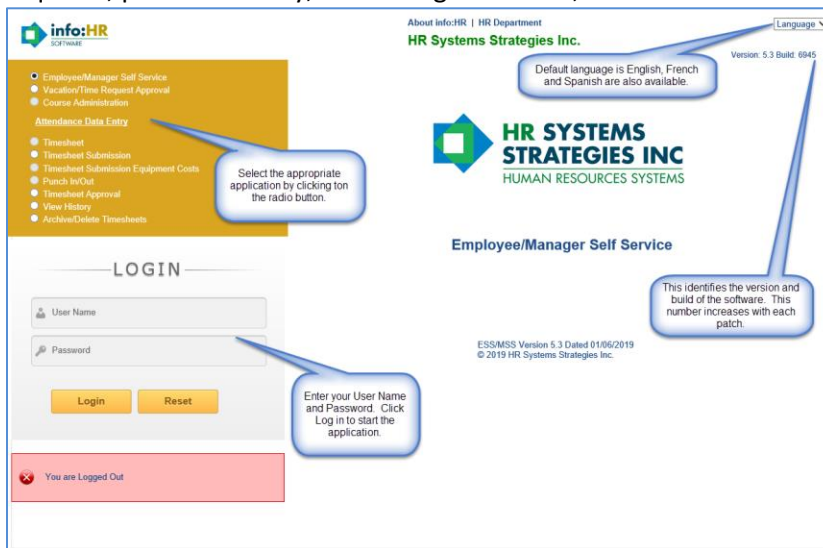
Changing/deleting an existing attachment:



Getting Started

Initial Login

This screen allows employees and managers to log in to their personal profile to view entitlements, time requests, position history, continuing education, etc.



Employee/Manager Self Service

When employees use their personal username and password to log in, they will see all information that pertains to their employee file. When managers log in, they will also their personal information, but also all of the same information for their employees.

Vacation/Time Request Approval

This is a management function only. When managers log in, they will see all time and vacation requests that have been submitted by all of their employees.

Application Settings

This area is generally only used by HR and IT. It maintains options that will control the processing logic of the applications. Changes here will affect all users. Please refer to the section of this documentation that describes the options available and what affect they have on the applications.

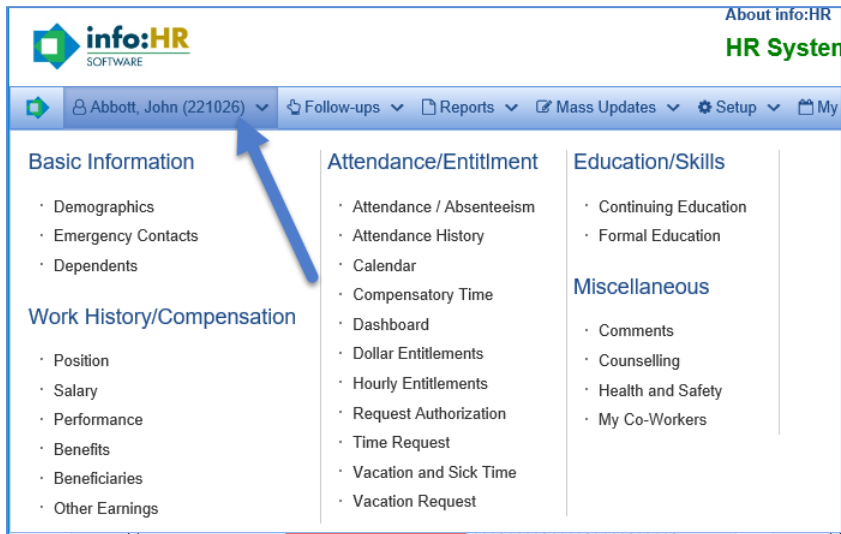
Menu Items

The ESS menu is located at the top of the screen. Menu items will appear based on the security provided to the user. Some menu items may not be present due to restricted security of features.

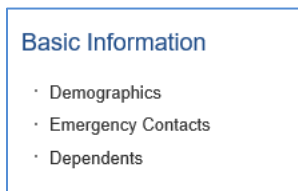


To search for employees, use the search feature on the right-hand side of the page. For more details, refer to the Employee Search section of this document.

To view the general menu, click on the name of the employee on the left side of the menu bar.



Below categorize the types of data available in ESS/MSS. Based on each category, items under each menu can be hidden.



Menu Item	Purpose
Demographics	Contains the personal employee information such as name, address, phone, etc. Based on the security profile, this information can be changed. Changes here will reflect in info:HR and all 3 rd party interfaces. An email can be created whenever a change occurs on this page. This page also reflects the employee's organizational structure. This information cannot be changed.
Emergency Contacts	Contains the employee's primary and secondary emergency contacts along with some doctors and health card information.
Dependents	Contains a list of all dependents associated with the employee. Information here may be maintained by the employee should their security profile permit it.

Work History/Compensation

- Position
- Salary
- Performance
- Benefits
- Beneficiaries
- Other Earnings

Menu Item	Purpose
Position	Contains a list of all positions held by the employee over time. The current position is indicated. Information here may not be maintained by the employee/supervisor with the exception of importing Job Offers. To import Job Offers, the user must have the correct setting in their security profile.
Salary	Contains a list of all salaries paid to the employee over time. The current salary is indicated. Information here may not be maintained by the employee/supervisor.
Performance	Contains a list of all performance reviews conducted for the employee over time. The current performance is indicated. Information here may be maintained by the employee/supervisor based on their security profile.
Benefits	Contains a list of all benefits assigned to the employee. Information here may not be maintained by the employee/supervisor.
Beneficiaries	Contains a list of all beneficiaries by type of Benefit. Information here <u>should not</u> be maintained by the employee/supervisor. Beneficiaries should be maintained only through info:HR.
Other Earnings	Contains a list of all other earnings applied to the employee. Information here may be maintained by the employee/supervisor based on their security profile.

Attendance/Entitlement

- Attendance / Absenteeism
- Attendance History
- Calendar
- Compensatory Time
- Dashboard
- Dollar Entitlements
- Hourly Entitlements
- Request Authorization
- Time Request
- Vacation and Sick Time
- Vacation Request

Menu Item	Purpose
Attendance/Absenteeism	Contains a list absences or hours worked for the employee. The data shown on this page is generally for the current entitlement period only. Information here may be maintained by the employee/supervisor based on their security profile.
Attendance History	Contains a list absences or hours worked for the employee. The data shown on this page is created after HR archives their current year file. The page will have many years' worth of data. Information here may be maintained by the employee/supervisor based on their security profile. It is not recommended that historical records are maintainable in ESS/MSS.
Compensatory Time	Contains a list of all hours worked and taken as Compensatory or Lieu Time.
Dashboard	Contains analytical information as defined in info:HR's Dashboard Setup.
Dollar Entitlements	Contains a list of dollar entitlements assigned to the employee. Information here may not be maintained by the employee/supervisor.
Hourly Entitlements	Contains a list of paid time off entitlements assigned to the employee. Information here may be maintained by the employee/supervisor based on their security profile. It is not recommended that these records be maintained in ESS/MSS. Info:HR should control the rules as to what entitlements apply to which group of employees. Based on the Application Settings screen, this may be the first screen the employee sees after logging into ESS/MSS.
Request Authorization	Contains a list of all submitted or resubmitted vacation and time requests. This is a supervisor-only function and is controlled via the employee's security profile ESS & Timesheet Module page.
Time Request	Provides the ability to view, submit or resubmit, delete and cancel requests for an Attendance Reason Code either identified as 'absent' or from a list of approved Attendance Codes defined in the Application Settings screen.
Vacation and Sick Time	Provides the ability to view entitlement data for vacation and sick as defined by info:HR. Based on the Application Settings screen, this may be the first screen the employee sees after logging into ESS/MSS.
Vacation Request	Provides the ability to view, submit or resubmit, delete and cancel vacation requests.

Education/Skills

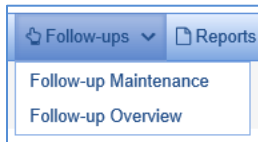
- Continuing Education
- Formal Education

Menu Item	Propose
Continuing Education	Contains a list of continuing education records for a given employee. Information here may be maintained by the employee/supervisor based on their security profile.
Formal Education	Contains a list of formal education records for a given employee. Information here may not be maintained by the employee/ supervisor with the exception of importing a document. To import a document, the user must have the Maintain setting in their security profile.

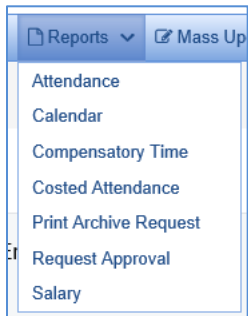
Miscellaneous

- Comments
- Counselling
- Health and Safety
- My Co-Workers

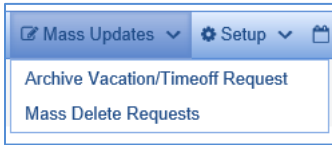
Menu Item	Purpose
Comments	Contains a list of comment records for a given employee. Information here may be maintained by the employee/supervisor based on their security profile.
Counselling	Contains a list of counseling records for a given employee. Information here may be maintained by the employee/supervisor based on their security profile.
Health & Safety	Contains a list of health & safety documents for a given employee. Information here may not be maintained by the employee/ supervisor with the exception of importing a document. To import a document, the user must have the Maintain setting in their security profile.
My Co-Workers	Displays a list of all employees in the organization. Clicking on an employee name will display contact information.



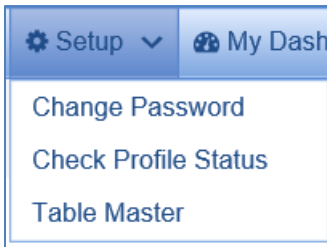
Menu Item	Purpose
Follow-ups Maintenance	Contains a list of all employees' Follow-ups. Information here may be maintained by the employee/supervisor based on their security profile.
Follow-ups Overview	Contains a list of all follow-ups for all employees that match the Follow-Up Selection Criteria in info:HR. Information here may be maintained by the employee/supervisor based on their security profile.



Menu Item	Purpose
Attendance	Provides the ability to view/print an attendance report based on the selection criteria entered by the user. The report is created using Excel.
Calendar	Provides the ability to view/print a calendar based on the selection criteria entered by the user. The report can be viewed in either HTML or Excel.
Compensatory Time	Provides the ability to view/print a compensatory time (lieu) report based on the selection criteria entered by the user. The report is created using Excel.
Costed Attendance	Provides the ability to view/print a costed attendance report based on the selection criteria entered by the user. The report is created using Excel.
Archived Request	Provides the ability to view/print a report of all time or vacation requests that were archived within the period of time entered on the selection criteria entered. The report is created using Excel.
Request Approval	Provides the ability to view/print report of all time or vacation requests that were approved based upon the information entered in the selection criteria entered. The report also shows approved requests with missing attendance records. The report is created using Excel.
Salary	Provides a report of employees' salary information based upon the information entered into the selection criteria and the user's security profile setting.



Menu Item	Purpose
Archive Vacation/Time Off Request	Provides the user with the ability to move vacation and time requests into an archived file. This option is only available if the employee/supervisor has been given the access rights via their security profile. It is recommended that this option is available only to the HR administrator of info:HR.
Mass Delete Requests	Provides the user with the ability to DELETE vacation or time requests based on criteria entered. This option is only available if the employee/supervisor has been given the access rights via their security profile. It is recommended that this option is available only to the HR administrator of info:HR.



Menu Item	Purpose
Change your Password	Provides the user with the ability to change their password.
Check Profile Status	A check list is displayed for both the employee and the logged in user. This check list identifies if there may be an issue with the setup of the employee and/or logged in user. Any ✘ should be investigated in the client-server info:HR module to see if there is problem with the setup.
Table Master	Contains a list of all table codes used in info:HR. No data maintenance is available on this page.

Check Profile Status

Check Profile Status

Employee Number:

Login UserID:

Check Profile

ESS Profile Check List

<p>Employee</p> <div style="text-align: center; margin-bottom: 5px;"> 80% Complete </div> <ul style="list-style-type: none"> ✔ Valid Employee Number ✘ info:HR email setup ✘ ESS/info:HR user id setup ✔ Current Position. ✔ Hours per day ✔ Current Salary ✔ Reporting authority setup ✔ Current Sick Entitlement (Not Hourly Entitlement)) ✔ Current Vacation Entitlement (Not Hourly Entitlement) ✔ Current Hourly Entitlement 	<p>Logged In User</p> <div style="text-align: center; margin-bottom: 5px;"> 100% Complete </div> <ul style="list-style-type: none"> ✔ Logged in user with at least 1 or more reports ✔ Logged in user email setup ✔ Logged in user is an employee ✔ Logged in user is a supervisor
--	--

Employee Basic Information

Demographics

Personal

Abbott, John (221026) | Follow-ups | Reports | Mass Updates | Setup | My Schedule | My Dashboard

Vacation and Sick Time | Demographics

Personal | Organizational | Miscellaneous

Salutation: MR. | Payroll ID: 1026 | Badge ID: 222

Last Name * : Abbott

First Name * : John

Middle Name:

Alias: Mr Wonderful

Address Line 1 * : 125 MILTOWN AVE.

Address Line 2:

City * : SCARBOROUGH

Province/State * : ONTARIO

Postal Code/Zip Code * : M4T1S2

Country: CANADA | Country of Employment: CHINA

Email Address: billk@infohr.com1

S.I.N.: 999999999 | S.S.N.:

Marital Status: Married | Birth Date: 12/27/1949

Gender: Male Female Not Disclosed | Original Hire: 1/2/1992

Home Telephone: 416 | 7205488

Telephone #2: 416 | 2546654 | Ext: 2

Cellular Telephone: 999 | 9999999

Pager Number: 123 | 4567890

Buttons: Save, Reset, Resume: Import

The personal tab displays the employee’s personal information. Any field marked with an asterisk beside it is mandatory in info:HR. It is required and the employee cannot save any data without having information in that field.

Button	Function
Save	Provides the ability to save personal information changed by the employee. This button is only enabled if the employee’s security profile gives the employee this access.
Reset	Prior to saving changes, the Rest button is an undo for all data entry changes.
Import	Provides the ability to import an employee’s Resume. This button is only enabled if the employee’s security profile gives the employee this access.
Find	Provides the ability to search the employee list.

Organization

Abbott, John (221026) | Follow-ups | Reports | Mass Updates | Setup | My Schedule | My Dashboard

Vacation and Sick Time | Demographics

Personal | **Organizational** | Miscellaneous

Department: FINANCE & ADMIN | Department Effective Date:

Gen Ledger: HR TEAM

Division: TORONTO HEAD OFFICE | Division Effective Date:

Location: MISSISSAUGA | Region: ONTARIO

Administered By: | Section: COFFEE

Buttons: Save, Reset, Resume: Import

The organizational tab displays the employee’s organizational information. The employee is not able to make any changes to this screen.

Button	Function
Save	Provides the ability to save personal information changed by the employee. This button is only enabled if the employee’s security profile gives the employee this access.
Reset	Prior to saving changes, the Rest button is an undo for all data entry changes.
Import	Provides the ability to import an employee’s Resume. This button is only enabled if the employee’s security profile gives the employee this access.
Find	Provides the ability to search the employee list.

Miscellaneous

The Miscellaneous tab displays other information related to the employee.

Button	Function
Save	Provides the ability to save personal information changed by the employee. This button is only enabled if the employee’s security profile gives the employee this access.
Reset	Prior to saving changes, the Rest button is an undo for all data entry changes.
Import	Provides the ability to import an employee’s Resume. This button is only enabled if the employee’s security profile gives the employee this access.
Find	Provides the ability to search the employee list.

Emergency Contacts

The screenshot shows a web application interface for managing emergency contacts. The breadcrumb trail is: Vacation and Sick Time > Demographics > Emergency Contacts. The form is titled 'Emergency Contacts' and is divided into several sections:

- Primary Contact Information:** Name * (JANE ABBOTT/JOHN ABBOTT), Relationship * (Parents), Telephone Number (515 2252666 Ext. 12), Telephone Number 2 (416 1234567 Ext. 2), Cellular Number, Pager Number, and Email Address.
- Secondary Contact Information:** Name, Relationship (Email), Telephone Number, Telephone Number 2, Cellular Number, Pager Number, and Email Address.
- Primary Doctor:** Doctor Name, Telephone Number, Address 1, and Address 2.
- Secondary Doctor:** Doctor Name, Telephone Number, Address 1, and Address 2.
- Health Card #:** 1233
- Version #:** 123
- Expiry Date:** 1/1/1980

At the bottom of the form are two buttons: 'Save' and 'Reset'.

In the case of an emergency, it is important to have all your employees' Emergency Contacts up to date. Employees can also update their medical contact and health card information. Enabling employees to maintain this information will help to ensure that the information is kept up-to-date and accurate.

Button	Function
Save	Provides the ability to save emergency information changed by the employee. This button is only enabled if the employee's security profile gives the employee this access.
Reset	Prior to saving changes, the Rest button is an undo for all data entry changes.

Dependents

Hide/Show Ended Dependents

ABBOTT, RAMONA Selected

Surname *
 First Name *
 Date of Birth
 Benefit Eligible Date
 Benefit End Date
 Relationship
 Gender Male Female
 COB Dental COB Medical COB Other

Abbott, Betty Jane Selected

Surname *
 First Name *
 Date of Birth
 Benefit Eligible Date
 Benefit End Date
 Relationship
 Gender Male Female
 COB Dental COB Medical COB Other


Employees can add, maintain or delete their dependent information. To edit the information, the user must click on **Selected** to enable the particular dependent data.

Button	Function
New	Provides the ability to enter a new dependent. This button is only enabled if the employee's security profile gives the employee this access.
Save	Provides the ability to save selected or new dependent data. This button is only enabled if the employee's security profile gives the employee this access.
Delete	Provides the ability to delete the Selected dependent record. This button is only enabled if the employee's security profile gives the employee this access.
Reset	Prior to saving changes, the Rest button is an undo for all data entry changes.

Work History/Compensation Position

Abbott, John (221026) | Follow-ups | Reports | Mass Updates | Setup | My Schedule | My Dashboard

Vacation and Sick Time | Demographics | Emergency Contacts | Dependents | Position

Position	Start Date	Reason for Change	Hours/Day	Hours/Week	Hours/Pay Period	Reason	End Date
 PRES	11/4/2011	PROM	8	40	80		
HRMGR	1/26/2006	COMW	8	40	80		
FMGR	1/2/1992	NEWH	8	40	80		

Acting Position Current Position

Position Code : PRES | President | End Date : | Reason : |

Start Date : 11/4/2011

Rept. Authority 1 : 221026 | Abbott, John

Rept. Authority 2 : |

Rept. Authority 3 : |

Hours/Day : 8.00

Hours/Week : 40.00

Hours/Pay Period : 80.00

Shift : |

Reason for Change : PROM | PROMOTION


FTE# : 1.00

FTE Hours/Year : 2,080.00

Notes 1 : |

Notes 2 : |

Offer Letter:

The Position page is view-only for employees and managers. The employee’s current position is displayed first. To view historical position information, click on a line in the grid box above the position details. A paper clip  in the left-most column indicates that the position has an attached Job Offer. Use the buttons below to open or attach a Job Offer.

Buttons	Function
View Attachment	Provides the ability to view the employee’s job offers on file.
Import	Provides the ability to import an employee’s Job Offer. This button is only enabled if the employee’s security profile gives the employee this access.

Salary

Abbott, John (221026) | Follow-ups | Reports | Mass Updates | Setup | My Schedule | My Dashboard

Vacation and Sick Time | Demographics | Emergency Contacts | Dependents | Position | Salary

Effective Date	Salary	Hour/Ann.	Position	Position Start Date	Salary Scale	Compa-Ratio	Next Review Date
1/3/2018	\$105,555.53	A	PRES	11/4/2011	00	87.96	
4/30/2015	\$103,995.60	A	PRES	11/4/2011	00	83.2	
3/4/2015	\$99,043.43	A	PRES	11/4/2011	00	79.23	
1/1/2013	\$97,101.40	A	PRES	11/4/2011	00	77.68	
4/1/2012	\$96,140.00	A	PRES	11/4/2011	00	76.91	
11/4/2011	\$95,000.00	A	PRES	11/4/2011	00	76	
10/3/2011	\$59,500.00	A	HRMGR	1/26/2006	03	127.96	
1/26/2006	\$56,500.00	A	HRMGR	1/26/2006	03	121.51	
6/3/2002	\$56,500.00	A	HRMGR	3/15/1998	03	121.51	
3/15/1998	\$56,000.00	A	HRMGR	3/15/1998	10	119.41	

Position: Current Salary Record

Position Start Date: Hours Per Week: Salary Per Pay: \$4,059.83

Hourly Rate: \$50.75

Reason For Salary Change	Percentage Change	Amount Change
<input type="text" value="AI"/>	<input type="text" value="2.00"/>	<input type="text" value="\$1559.93"/>
<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="\$0.00"/>
<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="\$0.00"/>

Salary: Per: Step:

Effective Date: Payroll ID:

Comments:


Compa-Ratio: 87.96 Next Review Date:

Pay Period: Transaction Date:

Updated By: 999999999

The Salary page is view-only for employees and managers. The employee's current salary is displayed first. To view historical position information, click on a line in the grid box above the salary details.

Performance

The Performance page is view-only for employees. Managers may have the ability to maintain performance review data based upon their security profile. The employee’s current performance is displayed first. To view historical performance information, click on a line in the grid box above the performance details. A paper clip  in the left-most column indicates that the performance record has an attached Performance Review. Use the buttons below to open or attach a Performance Review.

Button	Function
Submit	Provides the ability to save performance review data. This button is only enabled if the employee’s security profile gives the employee this access.
New	Provides the ability to enter a new performance review. This button is only enabled if the employee’s security profile gives the employee this access.
Delete	Provides the ability to delete a performance review record. This button is only enabled if the employee’s security profile gives the employee this access.
Reset	Prior to saving changes, the Rest button is an undo for all data entry changes.
Import	Provides the ability to import an employee’s Performance Review. If creating a new Performance record, you cannot import a document until after you have SAVED the record. This button is only enabled if the employee’s security profile gives the employee this access.
View Attachment	Provides the ability to view the employee’s performance reviews on file.

Benefits

Benefit	Effective Date	Cov	Coverage Amount	Annual Employee	Annual Company	Total Cost	End Date
DENTAL	2/2/1992	F	\$ 0.00	\$ 369.45	\$ 1,108.35	\$ 1,477.80	
EXTENDED HEALTH CARE	4/2/1992	F	\$ 0.00	\$ 0.00	\$ 950.00	\$ 950.00	
DEPENDENTS GROUP LIFE INS.	4/13/2006	.	\$ 10,000.00	\$ 100.00	\$ 0.00	\$ 100.00	
LIFE INSURANCE	4/2/1992	.	\$ 212,000.00	\$ 0.00	\$ 712.32	\$ 712.32	
LONG TERM DISABILITY	4/2/1992	.	\$ 105,555.53	\$ 0.00	\$ 237.50	\$ 237.50	
Total Cost				\$ 469.45	\$ 3,008.17	\$ 3,477.62	

The Benefits page is view-only and shows all enrolled benefits for the employee. **Show Details of Benefits** gives additional details such as waiting period, maximum, coverage type, etc.

Beneficiaries

John Abbott Select

Benefit*

Beneficiary's Name*

Date of Birth

Relationship

Percentage

Mary Brown Select

Benefit*

Beneficiary's Name*

Date of Birth

Relationship

Percentage

The Beneficiary page displays all beneficiaries assigned to each benefit. The employee has the ability to maintain beneficiary data based upon their security profile to edit a record, click on **Select** to enable the fields for editing. Procedurally, it is not recommended to give employees the ability to maintain or delete beneficiary records. Usually, insurance carriers require certain documents completed prior to accepting a change in beneficiary.

Button	Function
Save	Provides the ability to save beneficiary data. This button is only enabled if the employee's security profile gives the employee this access.
New	Provides the ability to enter a new beneficiary record. This button is only enabled if the employee's security profile gives the employee this access.
Delete	Provides the ability to delete a beneficiary record. This button is only enabled if the employee's security profile gives the employee this access.
Reset	Prior to saving changes, the Rest button is an undo for all data entry changes.

Other Earnings

Type of Earnings	From Date	To Date	Cost of Employment	Amount
CAR ALLOWANCE	1/1/2006	12/31/2006	No	\$10

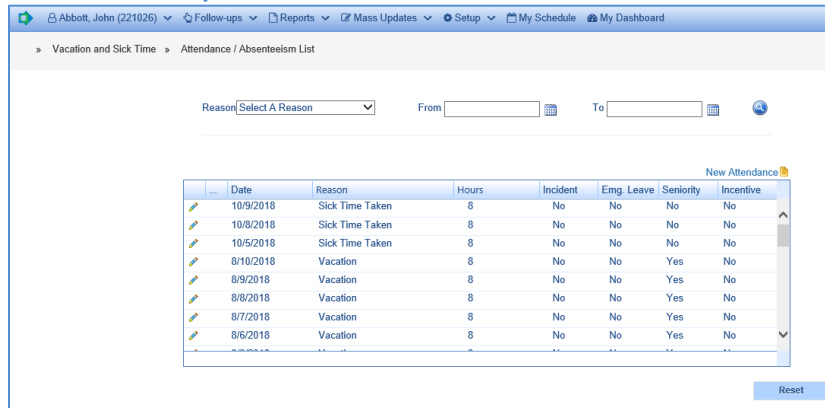
The Other Earnings page displays all non salary-based regular earnings that have been assigned to the employee. Employees have the ability to maintain other earning data based upon their security profile. The information displayed here normally comes from payroll and it is not recommended that employees are not given the ability to maintain or delete this data.

By using the **Sort Order** drop-down, the Other Earnings can be display in other orders. Available options are:

Button	Function
Save	Provides the ability to save other earnings data. This button is only enabled if the employee’s security profile gives the employee this access.
New	Provides the ability to enter a new other earnings record. This button is only enabled if the employee’s security profile gives the employee this access.
Delete	Provides the ability to delete an Other Earnings record. This button is only enabled if the employee’s security profile gives the employee this access.
Reset	Prior to saving changes, the Rest button is an undo for all data entry changes.

Entitlements

Attendance/Absenteeism

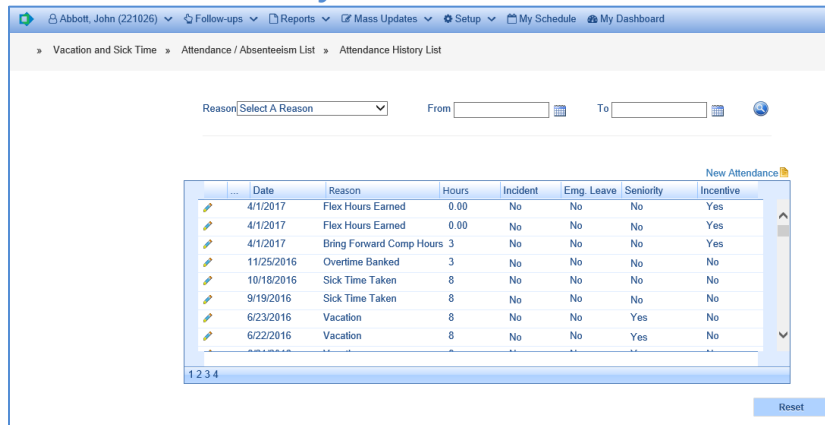


The Attendance page displays all attendance or absenteeism records that have been assigned to the employee. These records can come from multiple sources such as ESS, Timesheets, manual data entry, interfaces, etc. Employees can maintain this data based upon their security profile. Caution is advised if you give employees or supervisors the ability to maintain or delete any data on this screen since the Attendance Master may become out-of-sync with other info:HR modules or interfaces. Traditionally, this page only shows the current year’s attendance or absenteeism information.

Clicking on a column header will sort the display by that field; one click for ascending, two clicks for descending.

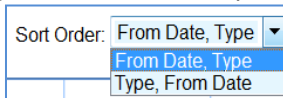
Buttons	Function
Save	Provides the ability to save Attendance/Absenteeism data. This button is only enabled if the employee’s security profile gives the employee this access.
New	Provides the ability to enter a new Attendance/Absenteeism record. This button is only enabled if the employee’s security profile gives the employee this access.
Delete	Provides the ability to delete an Attendance/Absenteeism record. This button is only enabled if the employee’s security profile gives the employee this access.
Reset	Prior to saving changes, the Rest button is an undo for all data entry changes.
Import	Provides the ability to import Attendance/Absenteeism document. If creating a new attendance/absenteeism record, you cannot import a document until after you have SAVED the record. This button is only enabled if the employee’s security profile gives the employee this access.

Attendance History



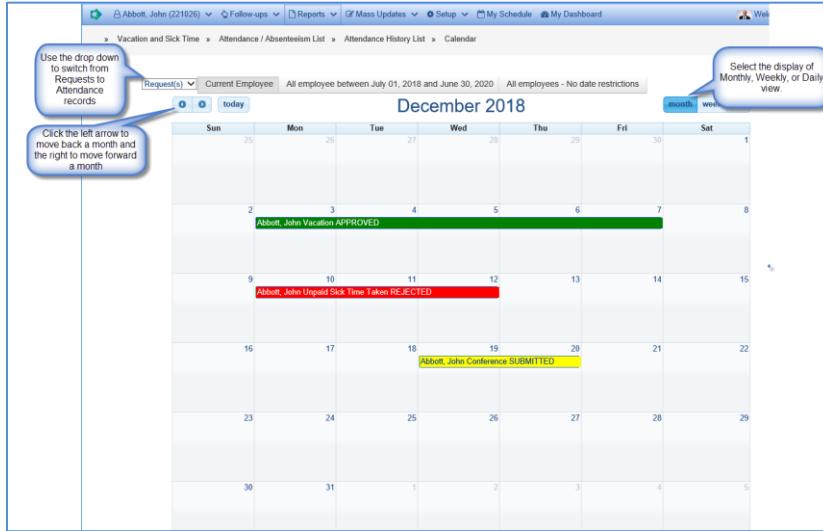
The Attendance History works exactly like the Attendance/Absenteeism screen, except that it displays attendance data from all years prior to the current. Caution is advised if you give employees or supervisors the ability to maintain or delete any data on this screen since the Attendance History Master may become out-of-sync with other info:HR modules or interfaces.

By using the **Sort Order** drop-down, the data can be display in other orders. Available options are:



Button	Function
Save	Provides the ability to save Attendance/Absenteeism data. This button is only enabled if the employee’s security profile gives the employee this access.
New	Provides the ability to enter a new Attendance/Absenteeism record. This button is only enabled if the employee’s security profile gives the employee this access.
Delete	Provides the ability to delete an Attendance/Absenteeism record. This button is only enabled if the employee’s security profile gives the employee this access.
Reset	Prior to saving changes, the Rest button is an undo for all data entry changes.
Import	Provides the ability to import Attendance/Absenteeism document. If creating a new attendance/absenteeism record, you cannot import a document until after you have SAVED the record. This button is only enabled if the employee’s security profile gives the employee this access.

Calendar

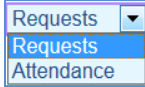


This page shows either employee's Requests or employee's Attendance. The view can be Monthly, Weekly or Daily. By default, the view is monthly.

Use these buttons to select the display option.

Use the Arrow buttons to move forward or back a month, week or day. Today will return you to the current date.

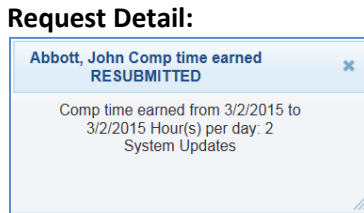
By using the down arrow, the page can flip between ESS Requests and Attendance. See below:



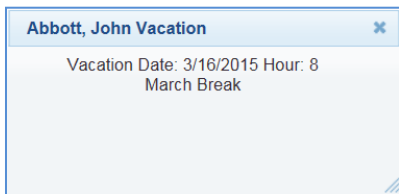
Hover over the Green Question Mark to view the request colour legend.



To see the details about a particular day, click on the day and a popup opens showing the detail. Click on the 'x' to close the popup. See below:



Attendance Detail:



The calendar can be switched from an employee view to the supervisor view by clicking the radio button. Based on the login ID, all employees' Attendance or Request data will be displayed.

Current Employee

- Will display the employee currently selected.

All employee between July 01, 2018 and June 30, 2020

- Will display all records for the date range shown.

All employees - No date restrictions

- Will display all employees without a date range restriction. **Note:** *This option may take several minutes to display records.*

Compensatory Time



Date	Earned	Taken	Outstanding	Outstanding In Equivalent Days
1/1/2018	10.00		10.00	1.25
8/15/2018	4.00		14.00	1.75
10/23/2018	3.00		17.00	2.13
9/28/2019	10.00		27.00	3.38
10/15/2019		8.00	19.00	2.38

This page is a snapshot of all Attendance Master Records showing only Attendance reason codes beginning with “OT” and “CT”. The “Earned” column uses Attendance Master Records beginning with “OT” and the “Taken” column uses Attendance Master Records beginning with “CT”. “Outstanding” is calculated by subtracting the Taken from the Earned. “Outstanding Equivalent in Days” divides the “Outstanding” column by the employee’s Hours per Day from the Work History/Compensation Position screen. Employees are not able to enter data here, but simply check their balances.

Dashboard

General Information

The side-menu item Dashboard has its own security setting under the **ESS/Timesheet Web Modules** page in the Security Master. This item needs to be checked to display the Dashboard as a side menu item. This is a separate item from the **My Dashboard** on the breadcrumb line and can show additional items. To open a dashboard item, move the mouse over the item.

Dashboards are broken into two categories. There is one view for employees and another view for supervisors. A supervisor is defined based on the Supervisor checkbox of the **Email Setup** screen in the info:HR **Setup** menu. Supervisors also see the employee dashboard.

The order of the information that appears in the dashboard is decided by the system administrator and is set in info:HR under the **Setup** menu. This function also allows the administrator to turn on/off dashboard items. Please refer to the info:HR documentation for details concerning this feature.

Employee Dashboard Items

▼ Vacation Outstanding	
Outstanding	333.92 hours

- Displays the outstanding amount based upon what is set up in the Vacation Entitlement Master rule. This display will show in either “Hours” or “Days” based upon the Application Settings screen in ESS.

▼ Vacation Calculated	
Calculated	Available Calculated
385.92 hours	333.92 hours

- If “Show Calculated” is enabled on the Application Settings screen, this item displays the total annual entitlement as “Calculated” and the current month-to-date “Available Calculated”. Either “Hours” or “Days” are displayed based upon the Application Settings screen.
- This item can be disabled via the Application Settings screen. Refer to that section of the document for more details.

▼ All Vacation Columns							
Previous	Current	Taken	Outstanding	Calculated	Available Calculated	From	To
20.00 hours	385.92 hours	72.00 hours	333.92 hours	385.92 hours	333.92 hours	1/1/2016	12/31/2016

- Displays all vacation components, including the Entitlement Date Range, based upon what is set up in the Vacation Entitlement Master rule. Either “Hours” or “Days” are displayed based upon the Application Settings screen.
- The “Calculated” and the “Available Calculated” can be disabled via the Application Settings screen. Refer to that section of the document for more details.

▼ Vacation Request Metrics

Request(s)	Total Hour(s)	Status	Entitlement Year
3	48.00	APPROVED	1/1/2016 - 12/31/2016
3	48.00		

- Displays, by Status, the number of Vacation Requests and the total number of hours/days requested. “Hours” or “Days” is based upon the Application Settings screen.

▼ Sick Outstanding

Outstanding
40.00 hours

- Displays the outstanding amount based upon what is set up in the Sick Entitlement Master rule. Either “Hours” or “Days” are displayed based upon the Application Settings screen.

▼ All Sick Columns

Previous	Current	Taken	Outstanding	Calculated	Available Calculated	From	To
0.00 hours	40.00 hours	0.00 hours	40.00 hours	40.00 hours	40.00 hours	1/1/2016	12/31/2016

- Displays all sick components, including the Entitlement Date Range, based upon what is set up in the Sick Entitlement Master rule. Either “Hours” or “Days” are displayed based upon the Application Settings screen.

▼ Comp Time Outstanding

Compensatory Balance
26.50 hours

- This is also referred to as “lieu time” or “banked overtime”.
- Displays the results of the formula that sums all Attendance Reason Codes beginning with “OT” and subtracts all Attendance Reason Codes beginning with “CT”. This display will show in either “Hours” or “Days” based upon the Application Settings screen.

▼ Total Earned & Total Comp Taken

Comp time earned	Comp time taken	Compensatory Balance
30.50 hours	4.00 hours	26.50 hours

- This is also referred to as “lieu time” or “banked overtime”.
- Displays the results of the formula that sums all Attendance Reason Codes beginning with “OT” (as Lieu Earned) and all Attendance Reason Codes beginning with “CT” (as Lieu Taken). This display will show in either “Hours” or “Days” based upon the Application Settings screen.

▼ Hourly Entitlement Outstanding (By Reason/Date)

Reason	From	To	Outstanding
Doctor appointment	1/1/2016	12/31/2016	17.50 hours
Flex hours earned	1/1/2016	12/31/2016	0.00 hours
Floating days off	1/1/2016	12/31/2016	24.00 hours
Moving day	1/1/2016	12/31/2016	1.88 hours

- Displays, by Hourly Entitlement Reason, all current year outstanding balances. This display will show in either “Hours” or “Days” based upon the Application Settings screen.

▼ Time Request Metrics (By Reason)

Request(s)	Reason	Total Hour(s)	Status	Calendar Year
2	Family sick time	0.00	APPROVED	1/1/2016 - 12/31/2016
1	Flex hours earned	5.00	SUBMITTED	1/1/2016 - 12/31/2016
1	Flex hours taken	32.00	REJECTED	1/1/2016 - 12/31/2016
1	Overtime at 1.5	1.00	APPROVED	1/1/2016 - 12/31/2016
5		38.00		

- Displays, by Status, the number of Time Requests and the total number of hours/days requested. “Hours” or “Days” is based upon the Application Settings screen.

Supervisor Dashboard Items

Supervisor Dashboard items are based upon the login user's department security matrix. If the employee's Department Security's Department equals "ALL" (and nothing else), the metrics will include all employees located under "Find Active Employee". Otherwise, the metrics only include employees who the supervisor has access for.

Time Request Metrics (By Reason)				
Request(s)	Reason	Total Hour(s)	Status	Calendar Year
2	Family sick time	0.00	APPROVED	1/1/2016 - 12/31/2016
1	Flex hours earned	5.00	SUBMITTED	1/1/2016 - 12/31/2016
1	Flex hours taken	32.00	REJECTED	1/1/2016 - 12/31/2016
1	Overtime at 1.5	1.00	APPROVED	1/1/2016 - 12/31/2016
5		38.00		

- Displays, by Category, the total number of employees with a grand total number of employees.

Current Year "New Hires"	
Category	Total
	0

- Displays, by Category, the total number of current year new hires with a grand total number of new hires. Current year is based upon the system date's year value.

Current Year "Terminations"	
Termination Reason	Total
	0

- Displays, by Reason for Termination, the total number of employees that were terminated with the current year. Current year is based upon the system date's year value.

Current Year "Terminations"	
Termination Reason	Total
	0

- Calculates the turnover ratio of the current year counting all employees who work or have worked in the current year and all employees how terminated in the current year. The ratio is calculated by dividing the terminated count into the total active/term count.

Vacation Request Metrics			
Request(s)	Total Hour(s)	Status	Entitlement Year
3	88.00	APPROVED	4/1/2015 - 3/31/2016
3	48.00	APPROVED	1/1/2016 - 12/31/2016
2	80.00	APPROVED	Beyond 3/31/2016
8	216.00		

- Displays, by Status, the total number of Vacation Requests and total hours within the Entitlement Year.

▼ **Vacation Outstanding**

Employee	From	To	Outstanding Hour(s)
Abbott, John	4/1/2015	3/31/2016	168.00
Abel, Alex	1/1/2016	12/31/2016	333.92
Anderson, Dane	1/1/2016	12/31/2016	480.00
Armstrong, Bob	4/1/2015	3/31/2016	224.00

- Displays, by employee, the outstanding vacation hours with a grand total number of hours on the bottom of the page.

▼ **Hourly Entitlement Outstanding Dollars**

Employee	Reason	From	To	Outstanding Hour(s)	Cost
Abbott, John	Doctor appointment	1/1/2016	12/31/2016	17.50	\$875.00
Abbott, John	Flex hours earned	1/1/2016	12/31/2016	0.00	\$0.00
Abbott, John	Floating days off	1/1/2016	12/31/2016	24.00	\$1,200.00
Abbott, John	Moving day	1/1/2016	12/31/2016	1.88	\$94.00

- Displays, by employee, the outstanding vacation hours and extended costs with a grand total number of hours and cost on the bottom of the page.

▼ **Time Request Metrics (By Reason)**

Request(s)	Reason	Total Hour(s)	Status	Calendar Year
2	Family sick time	0.00	APPROVED	1/1/2016 - 12/31/2016
1	Flex hours earned	5.00	SUBMITTED	1/1/2016 - 12/31/2016
1	Flex hours taken	32.00	REJECTED	1/1/2016 - 12/31/2016
1	Overtime at 1.5	1.00	APPROVED	1/1/2016 - 12/31/2016
1	Sick	24.00	APPROVED	1/1/2016 - 12/31/2016
6		62.00		

- Displays, by Reason/Status, the total number of Time Requests within the Current Year.

Employee	Reason	From	To	Outstanding Hour(s)
Abbott, John	Doctor appointment	1/1/2016	12/31/2016	17.50
Abbott, John	Flex hours earned	1/1/2016	12/31/2016	0.00
Abbott, John	Floating days off	1/1/2016	12/31/2016	24.00
Abbott, John	Moving day	1/1/2016	12/31/2016	1.88
Abel, Alex	Doctor appointment	1/1/2016	12/31/2016	17.50
Abel, Alex	Flex hours earned	1/1/2016	12/31/2016	0.00
Abel, Alex	Floating days off	1/1/2016	12/31/2016	24.00
Abel, Alex	Leg banked time	1/1/2015	12/31/2015	85.00
Abel, Alex	Moving day	1/1/2016	12/31/2016	1.88

- Displays by Employee/Reason/From Date all hourly entitlement's outstanding balances with a grand total number of hours on the bottom of the page.

▼ Hourly Entitlement Outstanding Dollars

Employee	Reason	From	To	Outstanding Hour(s)	Cost
Abbott, John	Doctor appointment	1/1/2016	12/31/2016	17.50	\$875.00
Abbott, John	Flex hours earned	1/1/2016	12/31/2016	0.00	\$0.00
Abbott, John	Floating days off	1/1/2016	12/31/2016	24.00	\$1,200.00
Abbott, John	Moving day	1/1/2016	12/31/2016	1.88	\$94.00
Abel, Alex	Doctor appointment	1/1/2016	12/31/2016	17.50	\$476.70
Abel, Alex	Flex hours earned	1/1/2016	12/31/2016	0.00	\$0.00
Abel, Alex	Floating days off	1/1/2016	12/31/2016	24.00	\$653.76

- Displays, by employee, the outstanding hourly entitlement hours and extended costs with a grand total number of hours and cost on the bottom of the page.

▼ Sick Outstanding

Employee	From	To	Outstanding Hour(s)
Abbott, John	1/1/2016	12/31/2016	32.00
Abel, Alex	1/1/2016	12/31/2016	40.00
Anderson, Dane	1/1/2016	12/31/2016	40.00
Armstrong, Bob	1/1/2016	12/31/2016	40.00

- Displays, by employee, the outstanding sick hours with a grand total number of hours on the bottom of the page.

▼ Sick Outstanding Dollars

Employee	From	To	Outstanding Hour(s)	Cost
Abbott, John	1/1/2016	12/31/2016	32.00	\$1,600.00
Abel, Alex	1/1/2016	12/31/2016	40.00	\$1,089.60
Anderson, Dane	1/1/2016	12/31/2016	40.00	\$900.40
Armstrong, Bob	1/1/2016	12/31/2016	40.00	\$1,646.40
Brown, Thomas	1/1/2016	12/31/2016	40.00	\$798.00

- Displays, by employee, the outstanding sick entitlement hours and extended costs with a grand total number of hours and cost on the bottom of the page.

Dollar Entitlements

The screenshot displays the 'Dollar Entitlements' page in a web application. At the top, there is a navigation bar with user information (Abbott, John (221026)) and various menu options (Follow-ups, Reports, Mass Updates, Setup, My Schedule, My Dashboard). Below this is a breadcrumb trail: > Vacation and Sick Time > Calendar > Compensatory Time > Dashboard > Dollar Entitlements.

The main content area features a table with the following data:

Code	From	To	COE Flag	Entitlement \$	Actual	Variance	Reference Number
HEAL	1/1/2010	12/31/2010	Yes	\$500.00	\$50.00	\$450.00	
EQUI	1/1/2004	12/31/2004	Yes	\$200.00	0.00	0.00	

Below the table is a search and filter section. It includes a 'Sort Order' dropdown set to 'From Date, Code'. The 'Code' field is set to 'HEAL' with a tooltip 'Health promotion'. There is a checked checkbox for 'Cost of Employment'. The 'From Date' is '1/1/2010' and the 'To Date' is '12/31/2010'. The 'Entitlement Amount' is '\$500.00', the 'Actual Amount' is '\$50.00', and the 'Variance' is '\$450.00'. There are also fields for 'Reference Number', 'Paid To', and 'Paid Date'. A 'Comments' text area is present at the bottom of this section. A 'Show Actual Details' button is located at the bottom right of the page.

If a Dollar Entitlement is set up for employees, they can view these entitlements, see how much is used, and what is outstanding. All data entry is controlled via info:HR. This is a view-only page.

Hourly Entitlements

Code of Entitlement*	From Date*	To Date*	Previous Entitlement*	Taken	Outstanding	Cost of Employment
<input type="checkbox"/> Family Sick Time	4/1/2018	3/31/2019	0.00	8.00	0.00	8
<input type="checkbox"/> Flex Hours Earned	4/2/2017	3/30/2018	5.00	0.00	0.00	5
<input type="checkbox"/> Floating Days Off	1/1/2019	12/31/2019	24.00	24.00	0.00	48
<input type="checkbox"/> Moving Day	1/1/2018	12/31/2018	8.00	0.00	0.00	8

Days Hours Show Details

The Hourly Entitlement page displays all Hourly Entitlements that have been assigned to the employee. Employees and supervisors can maintain this data based upon their security profile. Caution is advised if you give employees or supervisors the ability to maintain or delete any data on this screen. Controlling the entitlement balances is generally only available to the system administrator.

This page will not handle the enhanced “flex bank logic”, for example: one flex earning code that has multiple flex deduction codes associated with it. This must be handled via info:HR and not through ESS/MSS.

Days / Hours Determines how the entitlements displayed.

Doctor appointment		
4/19/2016	Tuesday	0.25
Flex hours earned		
8/3/2016	Wednesday	0.63
1/1/2016	Friday	0.00

Show Details Displays the exact days and hours taken.

Doctor appointment		
4/19/2016	Tuesday	2.00
Flex hours earned		
8/3/2016	Wednesday	5.00
1/1/2016	Friday	0.00

Button	Function
Save	Provides the ability to save the entitlement information. This button is only enabled if the employee’s security profile gives the employee this access.
New	Provides the ability to enter a new Hourly Entitlement record. This button is only enabled if the employee’s security profile gives the employee this access.
Delete	Provides the ability to delete the Selected hourly entitlement record. This button is only enabled if the employee’s security profile gives the employee this access.
Reset	Prior to saving changes, the Rest button is an undo for all data entry changes.

Requesting/Approving Vacation and/or Time Off Requests

Overview

Depending upon your setup, time off requests can come from two sources. They are *Vacation Requests* or *Time Requests*. *Vacation Requests* can only be used if you have set up Vacation Entitlement rules under the *Vacation Entitlement Master*. A *Time Request* can be for any info:HR Attendance Reason marked as an “absent” code or a pre-defined list of Attendance Reason codes controlled via the Application Settings screen. A *Time Request* may or may not have an entitlement bank associated with it. For example, Sick and Lieu Time requests would have a bank balance that is shown on the request screen, versus a request to take time off to attend a course, which would not have bank balance.

Prior to using this function, it is important to review and confirm the *Application Settings*. There are items within the Application Settings screen that control how a request is handled when it is submitted. For example:

1. Ignoring weekends or stat holidays when calculating the number of days off
2. Using the Work Schedule logic
3. Allowing entitlement balances to be exceeded
4. Warning on duplicated requests


If using the new work schedule logic, *Work Schedule Rules* will need to be created in info:HR. Also, the Application Settings screen has items that directly affect how Work Schedule requests are handled. Refer to the Work Schedule section in this document.

Request Symbols Definition

On the request overview screens, the application displays symbols to the left of the Request Reason. The symbols are visual aids to the user to control editing requests, status of request and whether the request has employee comments included or not. Below is the list of request statuses:



- The last two items are based on some special functionality that will be available in a future release.

A definition of these icons are available on the Vacation Request, Time Request and Request Authorization screens by mouse over the  icon

The detail description of each symbol is as follows:



Click on this symbol if you need to view or edit a request.



This symbol identifies that the request has been submitted but not yet approved.



This symbol identifies that the request was resubmitted for approval.



This symbol identifies that the request was rejected by the supervisor. The employee can edit this request using the 'pencil' icon and resubmit the changes for approval.



This symbol identifies that the request has been approved. No further changes are allowed on this request.



This symbol identifies that the request was approved by a supervisor who then sent the request to another supervisor for further review. Any request can have an unlimited number of approvals, if the Approve Forward option is enabled in the Application Settings Screen.



This symbol indicates that the request has comments included. To view the comments without opening the request, mouse-over the symbol and the comments will pop up.

Time Request

The Time Request screen is where employees will submit a request for time off for every Attendance Reason Code marked as an absent code, except the “VAC”- Vacation Reason Code. Via an option in the Application Settings screen, users have the ability to limit the Attendance Reason Codes that appear in the drop-down list.

	Reason	From Date	To Date	Request Date	Hour	Total Hours	Total Days	Supervisor	RefNo
→	Conference	12/19/2018	12/20/2018	1/22/2019	8.00	16.00	2	Abbott, John	265
→	Unpaid Sick Time Take	12/19/2018	12/12/2018	1/22/2019	1.00	3.00	3	Abbott, John	266
→	Sick Time Taken	10/5/2018	10/10/2018	11/2/2018	8.00	24.00	3	Abbott, John	260
→	Conference	8/10/2015	8/10/2015	8/10/2015	8.00	8.00	1	Abbott, John	224
→	Client Visit	8/4/2015	8/5/2015	7/31/2015	8.00	16.00	2	Abbott, John	220
→	Overtime Taken	3/27/2015	3/27/2015	3/25/2015	2.00	2.00	1	Abbott, John	212
→	Conference	3/27/2015	3/27/2015	3/25/2015	8.00	8.00	1	Abbott, John	211
→	Family Sick Time	3/13/2015	3/13/2015	3/25/2015	8.00	8.00	1	Abbott, John	209
→	Late	3/10/2015	3/10/2015	3/25/2015	1.00	1.00	1	Abbott, John	210

The first screen displays all Time Requests that were previously submitted. The icons identify the status of the request. Please refer to the *Request Symbols Definition* section above.

To submit a request, click **New Time Request**. A new screen will be displayed.

NEW

Reason: Select A Reason

From Date: [Calendar Icon]

To Date: [Calendar Icon]

Hours per day: 10

Time Outstanding: 0 hours

Supervisor: Abbott, John

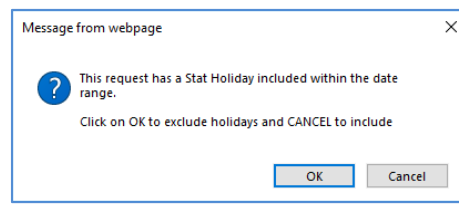
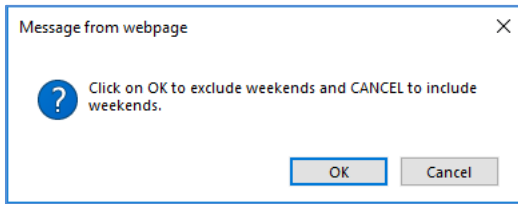
Incident:

Employee Comments (max 2000 chars): [Text Area]

Buttons: New, Submit, Delete, Cancel, Reset, Back to List

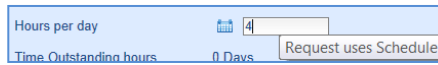
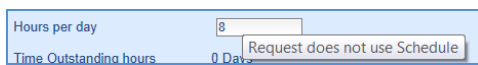
Select a **Reason** from the drop-down list.

Click on the **From Date** and select the date from the calendar. For a request spanning multiple days, click on the **To Date** and select the ending date from the calendar. Holidays are defined in info:HR’s Holiday Master. If the date range entered includes a Holiday or a weekend date, messages are displayed asking the employee whether those day(s) should be excluded or included. Those messages are:

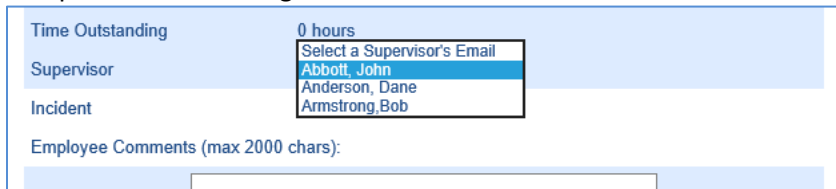


- By clicking **OK**, the day(s) would be excluded from the total number of days requested. **Cancel** includes the day(s).

Depending upon the *Application Settings*, **Hours per Day** is defaulted from either the employee's current Position or the employee's Work Schedule. If the defaulted hours are coming from the employee's current position, the **Hours per Day** on the request screen can be changed. Hours coming from the Work Schedule are fixed based upon the date range entered and the employee's Work Schedule. By placing your mouse over the **Hours per Day** text box, a pop up will show which options were selected by the employees. For example:



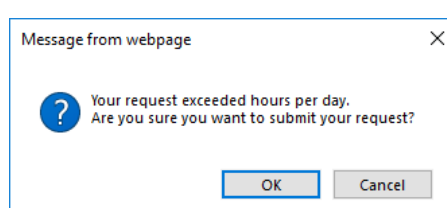
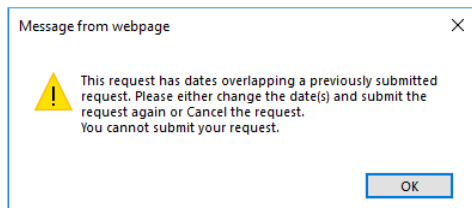
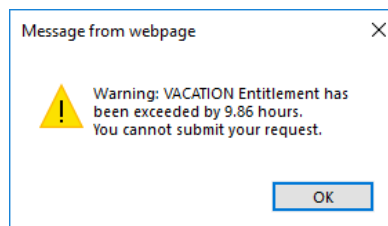
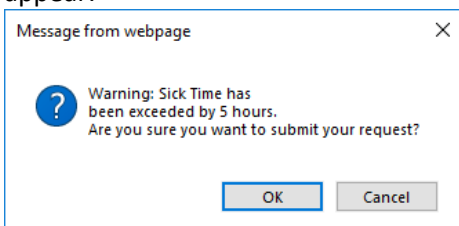
Complete the remaining fields as needed.



- The **Supervisor** can be changed if the user has the appropriate security setting.

Possible Errors Messages:

If the employee has submitted a request that exceeds the outstanding entitlement, a message will appear:

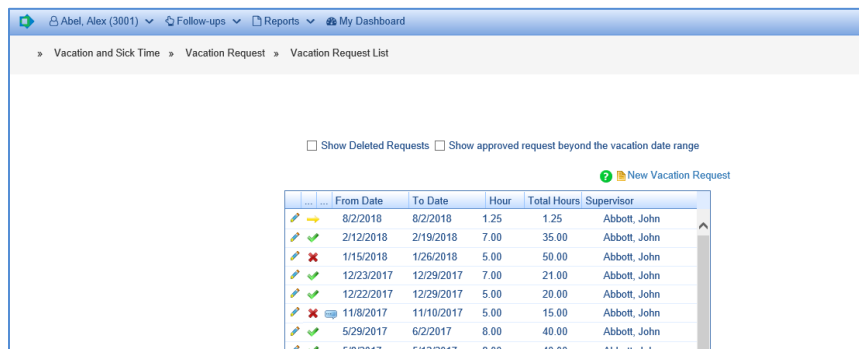


- Based on the *Application Settings*, the employee may or may not be able to submit a request if the Entitlement has been exceeded.

Button	Function
New	Provides the ability to enter a new Time Request record. This button is only enabled if editing, deleting or inquiring on an existing Time Request. During the New process, this button is disabled.
Submit	Provides the ability to submit the Time Request for approval.
Delete	Provides the ability to delete the Time Request record provided that the request has not been approved. If the request was approved, this button is enabled if the employee's security profile gives the employee the ability to delete approved requests. Deleting a Time Request sends an email to the employee and supervisor. If the request had been previously approved, the matching info:HR Attendance record(s) are deleted.
Cancel	Provides the ability to automatically create a Time Request reversing the selected Time Request. An email for approval is sent to the supervisor. This option is controlled via the employee's security profile
Reset	Prior to saving changes, the Rest button is an undo for all data entry changes.
Back to List	Provides the ability to go back to the overview screen on Time Request.

Vacation Request

The Vacation Request screen is where employees will submit a request for time off for Attendance Reason Code equal to “VAC”- Vacation Reason Code.

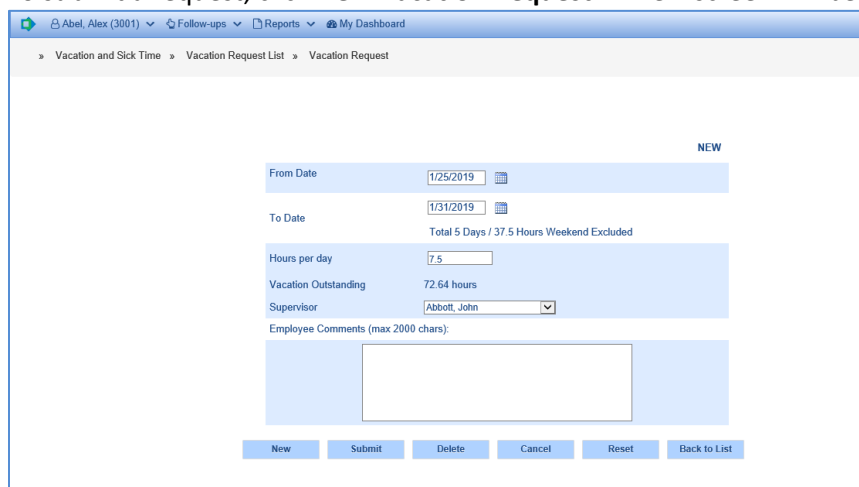


The first screen displays all Vacation Requests that were previously submitted. The icons identify the status of the request. Please refer to the *Request Symbols Definition* section above.

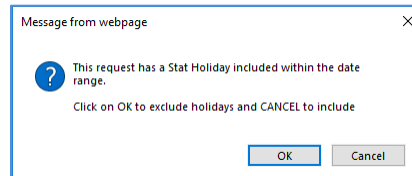
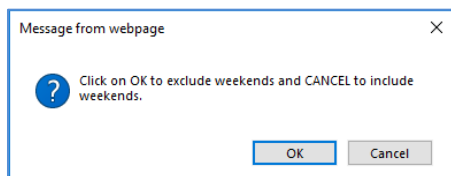


- The above check boxes provide the ability to see “deleted requests” and/or vacation requests that fall outside of the current vacation period.

To submit a request, click **New Vacation Request**. A new screen will be displayed.



Click on the **From Date** and select the date from the calendar. For a request spanning multiple days, click on the **To Date** and select the ending date from the calendar. The *Vacation Outstanding hours* for the current vacation year will be displayed. If the date range entered crosses a holiday as defined in info:HR’s Holiday Master, or a weekend, messages will pop up asking the employee whether or not those day(s) should be excluded or included. Those messages are:



- By clicking **OK**, the day(s) would be excluded from the total number of days requested. **Cancel** includes the day(s).

Depending upon the *Application Settings*, **Hours per Day** is defaulted from either the employee's current Position or the employee's Work Schedule. If the defaulted hours are coming from the employee's current position, the **Hours per Day** can be changed on the request screen. Hours coming from the Work Schedule are fixed based upon the date range entered and the employee's Work Schedule. To determine which option was used, mouse over the **Hours per Day** to pop up the where the hours were coming from. For example:

Hours per day: 8
 Vacation Outstanding hours: 4.5 Days
 Request does not use Schedule

Hours per day: 0
 Vacation Outstanding hours: 15 Days
 Request uses Schedule

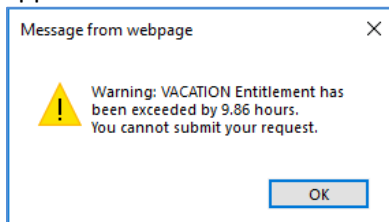
Complete the remaining fields as needed.

Supervisor: Abbott, John
 Employee Comments (max 2000 chars):
 [Text Area]
 Buttons: New, Submit, Delete, Cancel, Reset, Back to List

- The **Supervisor** can be changed if the user has the appropriate security setting.

Possible Errors Messages:

If the employee has submitted a request that exceeds the outstanding entitlement, a message will appear:



- Based on the *Application Settings*, the employee may or may not be able to submit a request if the Entitlement has been exceeded.

Button	Function
New	Provides the ability to enter a new Time Request record. This button is only enabled if editing, deleting or inquiring on an existing Time Request. During the New process, this button is disabled.
Submit	Provides the ability to submit the Time Request for approval.
Delete	Provides the ability to delete the Time Request record provided that the request has not been approved. If the request was approved, this button is enabled if the employee's security profile gives the employee the ability to delete approved requests. Deleting a Time Request sends an email to the employee and supervisor. If the request had been previously approved, the matching info:HR Attendance record(s) are deleted.
Cancel	Provides the ability to automatically create a Time Request reversing the selected Time Request. An email for approval is sent to the supervisor. This option is controlled via the employee's security profile
Reset	Prior to saving changes, the Rest button is an undo for all data entry changes.
Back to List	Provides the ability to go back to the overview screen on Time Request.

Request Authorization

Reason	Employee	From Date	To Date	Hour	Total Hours	Supervisor
Conference	Abbott, John	12/19/2018	12/20/2018	8.00	16.00	Abbott, John
Vacation	Abel, Alex	1/25/2019	1/31/2019	7.50	37.50	Abbott, John
Sick Time Taken	Abel, Alex	12/31/2018	1/2/2019	7.50	22.50	Abbott, John
Vacation	Abel, Alex	8/2/2018	8/2/2018	1.25	1.25	Abbott, John
Jury duty	Abel, Alex	8/8/2017	8/8/2017	4.00	4.00	Abbott, John
Sick Time Taken	Anderson, Dane	9/6/2017	9/6/2017	8.00	8.00	Abbott, John
Medical Appointment	Anderson, Dane	8/31/2017	8/31/2017	4.00	4.00	Abbott, John
Vacation	Anderson, Dane	7/1/2017	7/16/2017	8.00	72.00	Abbott, John
Jury duty	Armstrong, Bob	9/22/2017	9/22/2017	8.00	8.00	Abbott, John
Vacation	Armstrong, Bob	9/15/2017	9/15/2017	8.00	8.00	Abbott, John

This is a supervisor function only. The supervisor receives an email that a request has been submitted. The overview screen shows the list of unapproved requests (both Vacation & Time) in alphabetical order by employee last name. This order may be changed by clicking on any column heading.

The supervisor also has the ability to review other request statuses. For example:

Show All Requests Show Approved/Rejected Requests Show All Users Show Deleted Requests

Show All Requests

With this option, the supervisor can view other supervisor's requests. It's useful in situations where a supervisor is unavailable to approve a request and another supervisor is performing this function. This option is only available if the administrator has provided the supervisor with the appropriate security access.

Show Approved/Rejected Requests

With this option, the supervisor can review or change previously approved requests (both Vacation & Time). For example:

- An approved request can be deleted, which would send emails and delete the attendance records. Deleting an approved request requires the supervisor having the appropriate security settings.
- A rejected request can be approved. This would send the emails and create the attendance records.




Show All Users




Displays all requests for all users that have submitted a request.

Show Deleted Requests

With this option, the supervisor can view requests that have been deleted. No maintenance can be performed with this inquiry.

- **New Time Request** – Clicking this option will give the supervisor the ability to submit a new Time Request from this screen.
- **New Vacation Request** – Clicking this option will give the supervisor the ability to submit a new Vacation Request from this screen.

Employee From  To  

- Double click in the **Employee** box and select an employee. Once selected, click on the magnify glass .
- Click on the calendar icon  and pick dates. Once selected, click on the magnify glass .
- Combination of the two above.

Select an action Select an action

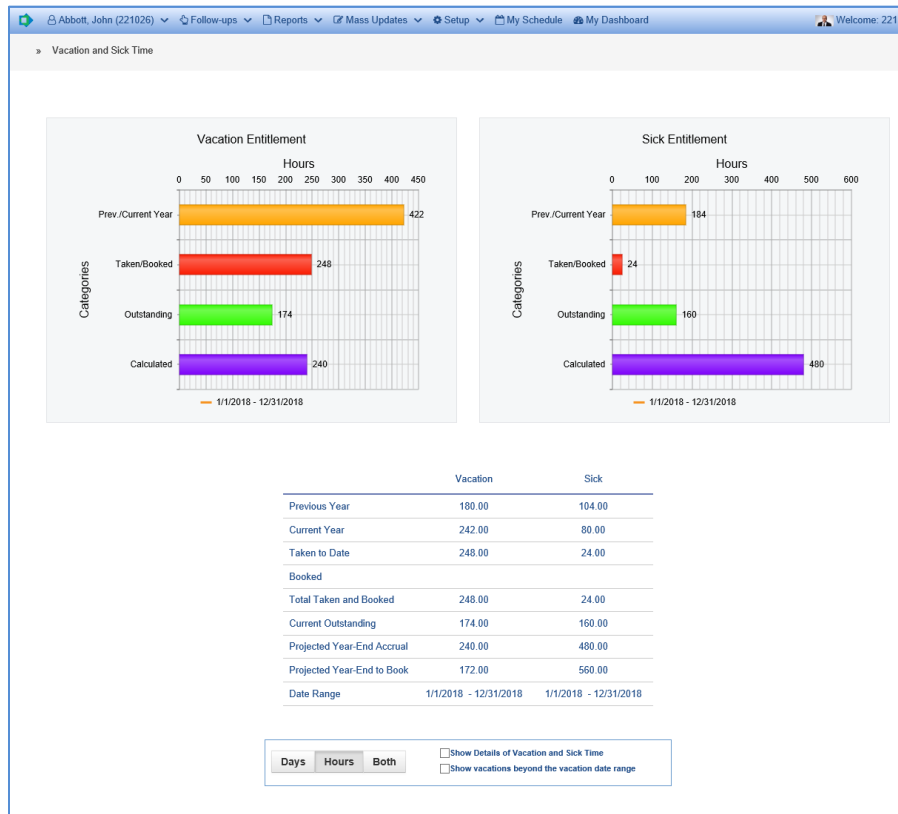
Supervisor Comments (max 2000) Approved
Rejected
Approve Forward

To approve the request, click on the down arrow key and select the option desired.

- Approved** Sends an email to the employee and creates the attendance records for the dates entered in the request. The request will have an *Approved* status.
- Rejected** Sends an email to the employee informing them that the request was not approved. It is recommended that the supervisor enters *Supervisor Comments* so the employee knows why the request was rejected. The request will have a *Rejected* status.
- Approve Forward** This is used if multi-level approval is activated on the Application Settings screen. Once approved, the employee and the next supervisor will receive an email. The request will have an *Approved Forward* status.

Button	Function
New	Provides the ability to enter a new Vacation Request record. This button is only enabled if editing, deleting or inquiring on an existing Vacation Request. During the New process, this button is disabled.
Submit	Provides the ability to submit the Vacation Request.
Delete	Provides the ability to delete the Vacation Request record provided that the request has not been approved. If the request was approved, this button is enabled if the employee's security profile gives the employee the ability to delete approved requests. Deleting a Vacation Request sends an email to the employee and supervisor. If the request had been previously approved, the matching info:HR Attendance record(s) are deleted.
Cancel	Provides the ability to automatically create a Vacation Request reversing the selected Vacation Request. An email for approval is sent to the supervisor. This option is controlled via the employee's security profile
Reset	Prior to saving changes, the Rest button is an undo for all data entry changes.
Back to List	Provides the ability to go back to the overview screen on Vacation Request.

Vacation and Sick Time



Vacation and Sick Time contains the details of the employee’s vacation and sick entitlements. Based on the *Application Settings*, this may be the default page showing when an employee logs into ESS.

Label	Description
Previous Year	Shows the vacation carried over from the previous year.
Current Year	Shows the vacation earned in the current year.
Taken to Date	Shows the vacation taken to current date.
Booked	Shows vacation booked in ESS
Total Taken and Booked	Shows total of taken to date and booked vacation.
Current Outstanding	Outstanding shows vacation remaining to be booked for the current year.
Projected Year-End Accrual	Shows the vacation to be earned by the employee for the year.
Projected Year-End to Book	Shows the vacation available to take currently.
Date Range	Displays the current year date range.

“Projected Year-End Accrual” shows only if the *Application Settings* are set to display this information. The “Projected Year-End” lines are only appropriate if the vacation entitlement is earned on a monthly basis since Available shows the expected total annual vacation that will be earned.

Days / Hours allows you to decide how you want the entitlements to display. The *Application Settings* defines the default option of either days or hours.

Show Details allows you to view the exact days/hours taken within the Date Range displayed on the page.

Days Hours Both			<input checked="" type="checkbox"/> Show Details of Vacation and Sick Time
			<input type="checkbox"/> Show vacations beyond the vacation date range
Vacation Time Taken			31.00
<hr/>			
12/7/2018	Friday	1.00	
12/6/2018	Thursday	1.00	
12/5/2018	Wednesday	1.00	

Show vacation beyond the vacation date range shows all approved vacation requests that were approved for the following vacation year.

Days Hours Both			<input type="checkbox"/> Show Details of Vacation and Sick Time
			<input checked="" type="checkbox"/> Show vacations beyond the vacation date range
Vacation Time Taken			30.00
<hr/>			
1/9/2019	Wednesday	1.25	
1/8/2019	Tuesday	1.25	
1/7/2019	Monday	1.25	

Follow-Ups

Follow-Up Maintenance

Completed	Effective	Reason	Comments
No	5/11/2018	Counselling Expiration	
Yes	3/5/2018	EDUCATION FOLLOW UP	Course: BK - Bookkeeping
Yes	12/31/2017	EDUCATION FOLLOW UP	Bookkeeping
No	9/22/2015	Police Check Renewal	Employee Handbook - Complete
No	9/2/2015	Counselling Expiration	
No	9/1/2015	Police Check Renewal	Drivers license - Annual Renewal
No	2/1/2015	Police Check Renewal	Police Check - Required
Yes	2/1/2013	Police Check Renewal	Police Check - Required
Yes	1/31/2013	EDUCATION FOLLOW UP	Year End Procedures

Completed

Reason: Counselling Expiration

Effective:

Administered By:

Comments:

Buttons: Save, New, Delete, Reset

Complete or view the information on the page as needed.

Button	Function
Submit	Provides the ability to save follow-up data. This button is only enabled if the employee's security profile gives the employee this access.
New	Provides the ability to enter a new follow-up record. This button is only enabled if the employee's security profile gives the employee this access.
Delete	Provides the ability to delete a follow-up record. This button is only enabled if the employee's security profile gives the employee this access.
Reset	Prior to saving changes, the Rest button is an undo for all data entry changes.

Follow-Up Overview

Searches can be either by:



If *Show my Follow-Ups* is checked, only follow-ups created by the login user will appear.

Education/Skills Continuing Education

Course Type	Course Code	Course Name	Completion Date	Employee \$	Other \$	Employee \$	Accommod
ADMN	BK	Bookkeeping	3/5/2018				
ADMN	BK	Bookkeeping	12/31/2017				
ADMN	YE	Year End Procedures	1/9/2012				
ADMN	PIP	xxxxx	12/14/2010				
ADMN	AI	Advanced INFO.HR	1/19/2006				
ADMN	INFO	Intro to INFO.HR	1/19/2006				
ADMN	TEST	TEST	1/17/2006				
ADMN	AI	Advanced	1/16/2006				

Course Type *	ADMN	Co-Ordinated By	
Course Code *	BK	Method Used	
Course Name *	Bookkeeping	Account #	
Course Description		Keyword	
Conducted By		Course Hours	5.00
Company Name		Employee \$	0.00
Trainer Name		Other Expenses \$	0.00
Results		Employer \$	0.00
Scheduled Date		Accommodation \$	0.00
Start Date		Learning Material \$	0.00
Date Completed	3/5/2018	Total \$	0.00
Renewal Date		<input type="checkbox"/> Presenter	

Attendance Data		Skills Data	
Reason		Skill	
Hours	<input type="checkbox"/> Seniority	Exp. Factor	

Save New Reset Delete

Continuing Education: Import

This page displays all courses taken by the employee. By default, the display is by *Course Type*. To change this sort, click on any of the column headings.

Button	Function
Save	Provides the ability to save continuing education data. This button is only enabled if the employee's security profile gives the employee this access.
New	Provides the ability to enter a new continuing education record. This button is only enabled if the employee's security profile gives the employee this access.
Reset	Prior to saving changes, the Rest button is an undo for all data entry changes.
Delete	Provides the ability to delete a continuing education record. This button is only enabled if the employee's security profile gives the employee this access.
Import	Provides the ability to import continuing education document. If creating a new continuing education record, you cannot import a document until after you have SAVED the record. This button is only enabled if the employee's security profile gives the employee this access.
View Attachment	Provides the ability to view the continuing education's attachment.

Formal Education

The screenshot shows the 'Formal Education' maintenance screen. At the top, there is a navigation bar with options like 'Abbott, John (221026)', 'Follow-ups', 'Reports', 'Mass Updates', 'Setup', 'My Schedule', and 'My Dashboard'. Below this, a breadcrumb trail reads 'Vacation and Sick Time > Continuing Education > Formal Education'. The main content area features a table with the following data:

Year	School	Major	Minor	Completed	Degree
6/1/1982	UNIVERSITY OF GUELPH	ADMINISTRATIVE & COMMERCIAL ST	COMPUTER SCIENCE	Y	BACHELOR OF ARTS

Below the table is a form for editing the record. The fields are as follows:

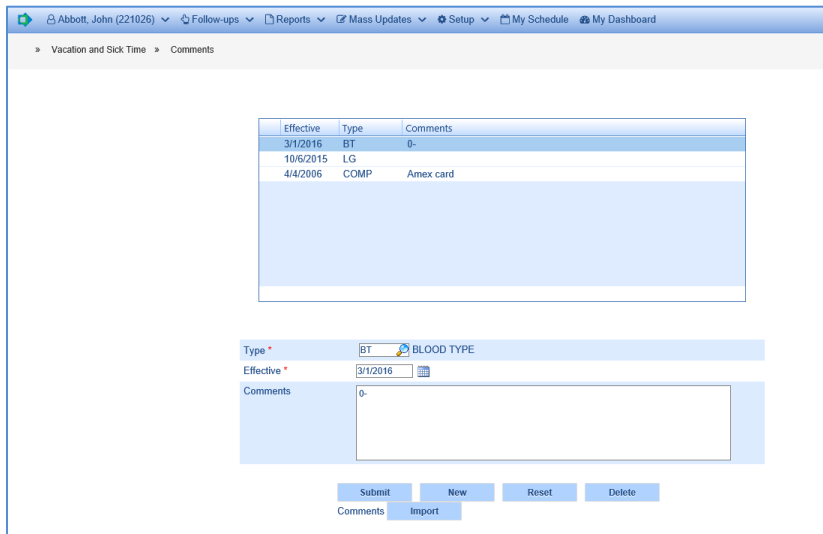
- School: UOFG UNIVERSITY OF GUELPH
- Major Study: A&CS ADMINISTRATIVE & COMMERCIAL ST
- Minor Study: COMP COMPUTER SCIENCE
- Completed on: 6/1/1982 Tuesday
- Degree Obtained: BA BACHELOR OF ARTS
- Completed:
- Company Paid:

At the bottom of the form, there is a label 'Formal Education:' followed by an 'Import' button.

Employees or supervisors have the ability to view their formal education records. Maintenance on this data is completed via info:HR.

Button	Function
Import	Provides the ability to import a formal education document.
View Attachment	Provides the ability to view the formal education attachment.

Miscellaneous Comments



This page displays all comments for the employee. By default, the display is by *Effective*. To change this sort, click on any of the column headings.

Button	Function
Submit	Provides the ability to save comment data. This button is only enabled if the employee's security profile gives the employee this access.
View Attachment	Provides the ability to view the comment's attachment.
New	Provides the ability to enter a new comment record. This button is only enabled if the employee's security profile gives the employee this access.
Reset	Prior to saving changes, the Rest button is an undo for all data entry changes.
Delete	Provides the ability to delete a comment record. This button is only enabled if the employee's security profile gives the employee this access.
Import	Provides the ability to import comment document. If creating a new comment record, you cannot import a document until after you have SAVED the record. This button is only enabled if the employee's security profile gives the employee this access.

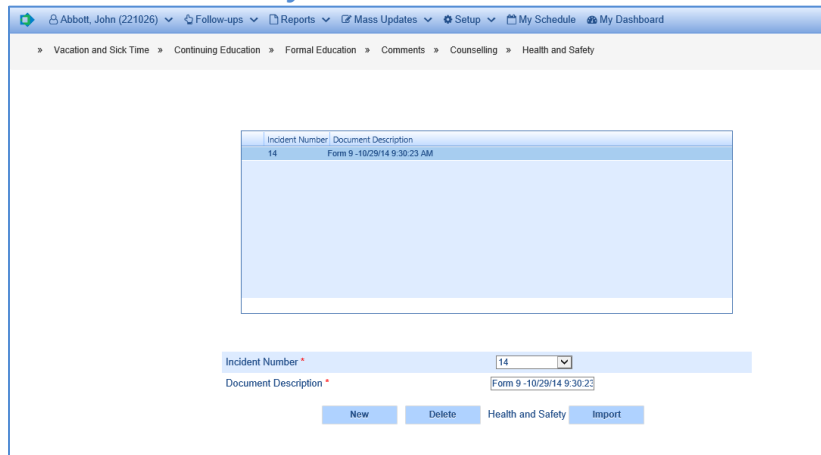
Counselling

Type	Reason	Counseling Date	Counseled By
Written #1	Improper attire	3/2/2015	1053
Coaching	Positive Handling of Client	10/17/2017	221026

This page displays all counselling for the employee. By default, the display is by *Type*. To change this sort, click on any of the column headings.

Button	Function
Submit	Provides the ability to save counselling data. This button is only enabled if the employee's security profile gives the employee this access.
New	Provides the ability to enter a new counselling record. This button is only enabled if the employee's security profile gives the employee this access.
Delete	Provides the ability to delete a counselling record. This button is only enabled if the employee's security profile gives the employee this access.
Reset	Prior to saving changes, the Rest button is an undo for all data entry changes.
Import	Provides the ability to import a counselling document. If creating a new counselling record, you cannot import a document until after you have SAVED the record. This button is only enabled if the employee's security profile gives the employee this access.
View Attachment	Provides the ability to view the counselling attachment.

Health and Safety



This page displays all health & safety incident documents for the employee. By default, the display is by *Incident Number*. To change this sort, click on any of the column headings. This page can only upload new health & safety documents or view health & safety attachments. Details on the health & safety records are visible only within info:HR.

Button	Function
New	Provides the ability to enter a new health & safety incident document. Once clicked, click on the Import button to import the document. This button is only enabled if the employee's security profile gives the employee this access.
Delete	Provides the ability to delete a health & safety attachment. This button is only enabled if the employee's security profile gives the employee this access.
Import	Provides the ability to import a health & safety document. If creating a new health & safety record, you cannot import a document until after you have SAVED the record. This button is only enabled if the employee's security profile gives the employee this access.
View Attachment	Provides the ability to view the health & safety attachment.

My Co-Workers


Surname	First Name	Department	Job Title
Abbott	John	FINANCE & ADMIN	President
Abel	Alex	ADMINISTRATION	DIRECTOR, HUMAN RESOURCES
Anderson	Dane	FINANCE & ADMIN	HR CLERK
Anderson	Bill	OPERATIONS	
Armstrong	Bob	FINANCE & ADMIN	BRANCH MANAGER
bbb	bbb	INSIDE WORKERS	
Brown	Thomas	SALES DEPARTMENT	FINANCE & ADMIN. MANAGER
Browning	Janice	ACCOUNTING	Admin Assistant
Halle	William	ACCOUNTING	RECEPTIONIST
Halle	Jenny	ADMINISTRATION	TELESALES REPRESENTATIVE

1 2

Search By Surname: Find

This page displays a list of all employees in the organization.

Abel, Alex



Name: Abel, Alex
Location: SW ONTARIO
Job Title: Director, Human Resources
Ext: 3011
Department: ADMINISTRATION

When an employee is selected a window will pop up displaying general organizational information for the employee.

Reports

General Information

All reports have selection criteria. This allows the user to filter the information that would appear on the report. There are multiple input methods available.

They are:

Drop-down lists:

- This option allows only one selection to be made. To unselect the option, click on the “blank” line. The “blank” line is found on the top of the drop-down list.

Pick lists:

- This option allows multiple selections based on what is displayed in the pick list. To select more than one item, hold down the **Ctrl** key and click on the item desired. Release the **Ctrl** key when you have completed picking from the list.

Employee lookups:

- This option will pop up an Employee List screen showing all employees who are part of your security matrix. To invoke this list, **double-click** in the box.
 - If you are not a supervisor and can only see your information, you do not ever need to enter anything in these boxes. By default, the report will display only **YOUR** information.

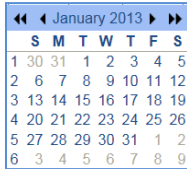
Surname	First Name	Employee #
Abbott	John	221026
Abel	Alex	3001
Anderson	Dane	1014
Anderson	Bill	15
Armstrong	Bob	1050
bbb	bbb	3002
Brown	Thomas	1013
Browning	Janice	2028
Haile	William	5001
Haile	Jenny	5000
Harper	Betsy	1054
JONES	JENNIFER	2215
King	Deborah	1012
Mansfield	Katherine	1052
Mansglebe	Jayne	1053
O'Hara	Jeri	2210
Sampson	Harry	10231
Sartre	Mary-Ellen	5984
Saunders	Carey	1027
YOUNG	YOGI	11011

- Type in the *Surname* and click **Find** or click on a letter of the alphabet to display employees whose surnames begin with that letter.
- To select the employee, click on the *Employee Number* in the right-hand column.

Input methods continued:

Date lookups:

- This option will pop up a calendar screen.



- Locate the date desired by clicking on the *Month* or *Year*. Once the month and year are found, click on the day of the month and the date will be inserted into the box. You cannot enter a date in this lookup, you must use the calendar icon selection method.

Check boxes:

- This option allows for multiple selections. To select the item, click in the box or click on the label. For example: *Absent* is the label.

Radio Buttons:

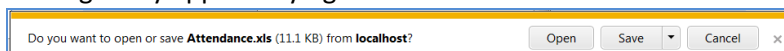
- This option is an either-or selection. Only one item can be selected.

Most reports have the ability for user-defined sorting. This section is called *Grouping*. The actual number of groups available is report-specific.

- If more than one grouping is shown, the report will be sorted based on *Grouping 1* being the primary sort and subsequent groupings follow.
- To change the grouping, click on the down arrow key.

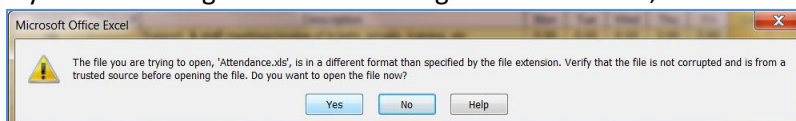
Depending upon the report, one or two different formats are available. The formats are *Excel* or *HTML*. The *HTML* instructions are found on the associated reports.

To process the report in *Excel*, click on the **View** button. Depending upon your browser, a pop up message may appear saying:



- Click **Open** to view the report immediately.
- Click **Save** or select from the drop-down to save the report to your computer.
- Click **Cancel** to cancel this request.
- Depending upon the number of records being processed, it is sometimes faster to save the report to your computer than open *Excel* to view or print the report.

If you are running a version of Excel greater than 2003, the following message appears:



1. Click on **Yes** to proceed.

Attendance

The Attendance Report allows employees to view their attendance records. To include multiple years' worth of data, click on the *Include Attendance History* option.

Enter the selection criteria and grouping options prior to clicking on the **View** button.

Report example:

West Coast Branch							
Abbott, John							
Employee #	Name	Reason	Date	Day Of Week	Hours	Days	Incident
11026	Abbott, John	Cause	11/23/2000	Thursday	8	1	N
		Total for Cause			8	1	0
11026	Abbott, John	Lieu Taken	3/1/2012	Thursday	16	2	N
		Total for Lieu Taken			16	2	0
11026	Abbott, John	Days	2/20/2012	Monday	8	1	N
11026	Abbott, John	Days	2/22/2012	Wednesday	8	1	N
11026	Abbott, John	Days	2/24/2012	Friday	8	1	N
		Total for Days			24	3	0
11026	Abbott, John	Tardy	1/20/2012	Friday	1	0.12	N
		Total for Tardy			1	0.12	0
		Total for Abbott, John			396.5	49.56	0
		Total for West Coast Branch			396.5	49.56	0
Employee Count:1		Grand Total			396.5	49.56	0

Compensatory Time

Abbott, John (221026) Follow-ups Reports Mass Updates Setup My Schedule My Dashboard

» Vacation and Sick Time » Attendance » Calendar » Compensatory Time

Division :

Department :

Status :

Union :

Category :

Location :

Administered By :

From: To:

Employee List

Include Attendance History

Grouping 1:

Final Sort:

This report prints a detailed (day of week) Compensatory Time report for employees. Compensatory Time is defined in info:HR using the Attendance Reason codes beginning with “OT” for the earned balance and “CT” for the taken balance.

Click on the **View** button to run the report.

Report example with *Grouping 1* (none) option selected:

	A	B	C	D	E	F	G	H
1	COMPENSATORY TIME REPORT							
2	Employee #	Employee Name	Reporting Authority	Day Of Week	Date	Earned	Taken	Balance
3	11026	Abbott, John	Abbott, John	Sunday	1/1/2012	12		12
4				Wednesday	1/25/2012	2		14
5				Thursday	3/1/2012		16	-2
6				Tuesday	6/5/2012	8		6
7		Total for	Abbott, John			22	16	6
8								
9	1051	Adams, Karen	Abbott, John	Sunday	1/1/2012	2		2
10		Total for	Adams, Karen			2	0	2

Report example with *Grouping 1* (Employee) option selected:

	A	B	C	D	E	F	G	H
1	COMPENSATORY TIME REPORT							
2	Employee #	Employee Name	Reporting Authority	Day Of Week	Date	Earned	Taken	Balance
3	Employee Name: Abbott, John							
4								
5	11026	Abbott, John	Abbott, John	Sunday	1/1/2012	12		12
6				Wednesday	1/25/2012	2		14
7				Thursday	3/1/2012		16	-2
8				Tuesday	6/5/2012	8		6
9		Total for	Abbott, John			22	16	6

Costed Attendance

This report reads the current Attendance Master records, summarizes the attendance records by Reason Code and displays the total hours and extended cost, by Attendance Reason, based on what the employee was earning during that period. To use only the employee’s current rate of pay to run the report, uncheck *Cost at Historical Rates*. If the *From / To Dates* span multiple years, check the *Include Attendance History* flag. The report shows the Supervisor’s Name (Reporting Authority #1) based on who the employee was reporting to at the time of the attendance record. To print a report showing only the employee’s current Supervisor, check the *Use current Reporting Authority*.

Click on the **View** button to run the report. The report opens a new window. This is a **HTML** report and not an **Excel** report.

Report example:

Date: 01/10/2013		Release 4.1			
Time: 07:58:49 AM		Costed Attendance Summary Report			
Division: : West Coast Branch					
Employee Nbr./Name	Reason	Hours	Days	Costs	Incident
11026 Abbott, John	Flex	8.00	1.00	423.04	
11026 Abbott, John	Statutory Holiday	8.00	1.00	423.04	
11026 Abbott, John	Vacation	232.00	29.00	12,268.16	
Total for Abbott, John		248	31	13,114.24	0
Total for West Coast Branch		248	31	13,114.24	0

Archived Request

Abbott, John (221026) ▾

[Follow-ups ▾](#)
[Reports ▾](#)
[Mass Updates ▾](#)
[Setup ▾](#)
[My Schedule](#)
[My Dashboard](#)

» Vacation and Sick Time » Attendance » Calendar » Compensatory Time » Costed Attendance » Print Archived Request

Employee:

From Date*

To Date

Archive Request* Both ▾

View
Reset

This report prints an Excel-based report showing all requests that were archived. *From Date* is mandatory; however, both dates should be entered to see a complete list.

Click on the **View** button to run the report.

Report example:

A	B	C	D	E	F	G	H	
1	Archive Vacation/Timeoff Request Report							
2								
3	Emp. #	Name	Reason	Date	Date Requested	Date Processed	Processed By	Status
4	1050	ARMSTRONG, GRANT	Vacation	11/9/2009 Monday	9/15/2009	9/15/2009	ABBOTT,JOHN	APPROVED
5				11/10/2009 Tuesday				
6				11/11/2009 Wednesday				
7				11/12/2009 Thursday				
8				11/13/2009 Friday				

Request Approval

Abbott, John (221026) ▾
Follow-ups ▾
Reports ▾
Mass Updates ▾
Setup ▾
My Schedule
My Dashboard

» Vacation and Sick Time » Attendance » Calendar » Compensatory Time » Costed Attendance » Print Archived Request » Request Approval

Selection Criteria

Department

Division

Location

Union

Status

Category

Region

Administered By

Section

Approved Rejected By

Employee #

Date Range From To

Attendance Code

Show Rejected Approved Unprocessed
 Employee Comments Supervisor Comments

This report prints an Excel-based report showing all requests based on the selection criteria entered.

Click on the **View** button to run the report.

Report example:

	A	B	C	D	E	F	G	H
1	Request Approval Report							
2								
3	Emp. #	Name	Reason	Date	Date Requested	Date Processed	Processed By	Status
4	221026	Abbott, John	Medical appointment	2/11/2015 Wednesday	Apr 22, 2015	Apr 22, 2015	Abbott, John	APPROVED
5								
6			Comp time earned	3/2/2015 Monday	Mar 25, 2015	Apr 22, 2015	Abbott, John	APPROVED
7								
8			Family sick time	3/13/2015 Friday	Mar 25, 2015	Mar 25, 2015	Abbott, John	APPROVED
9								
10			Vacation	3/16/2015 Monday	Mar 25, 2015	Mar 25, 2015	Abbott, John	APPROVED
11				3/17/2015 Tuesday				
12				3/18/2015 Wednesday				
13				3/19/2015 Thursday				
14				3/20/2015 Friday				
15								

Salary

Abbott, John (221026) | Follow-ups | Reports | Mass Updates | Setup | My Schedule | My Dashboard

» Vacation and Sick Time | » Attendance | » Calendar | » Compensatory Time | » Costed Attendance | » Print Archived Request | » Request Approval | » Salary

Division

Department

Location

Union
CUPE LOCAL 105
Halton Police Union

Status

Category

Employee Number

Supervisor

From / To Dates

Show Salary History

Grouping 1
 Grouping 2

This report prints an Excel-based report showing current salaries for all employees matching the selection criteria. To see both current and all historical salary changes, click on *Show Salary History*.

Click on the **View** button to run the report.

Report example (current salary only):

	A	B	C	D	E	F	G	H	I	J
1	Salary Report									
2										
3	Abbott, John									
4	Employee #	Name	Position	Position Start Date	Salary	Per	Step	Effective Date	Next Salary Review	Next Performance Review
5	221026	Abbott, John	President	11/04/11	\$99,043.43	A	0	3/04/15		
6			Total for Abbott, John		\$99,043.43					
7	Abel, Alex									
8	Employee #	Name	Position	Position Start Date	Salary	Per	Step	Effective Date	Next Salary Review	Next Performance Review
9	221028	Abel, Alex	HR CLERK	4/21/14	\$56,100.00	A	0	3/04/15		
10			Total for Abel, Alex		\$56,100.00					
11	Anderson, Dane									
12	Employee #	Name	Position	Position Start Date	Salary	Per	Step	Effective Date	Next Salary Review	Next Performance Review
13	1014	Anderson, Dane	HR CLERK	12/14/93	\$45,900.00	A	0	3/04/15		12/14/94
14			Total for Anderson, Dane		\$45,900.00					
15	Employee Count: 3		Grand Total		\$201,043.43					

Report example (salary history):

	A	B	C	D	E	F	G	H	I	J
1	Salary Report									
2										
3	Abbott, John									
4	Employee #	Name	Position	Position Start Date	Salary	Per	Step	Effective Date	Next Salary Review	Next Performance Review
5	221026	Abbott, John	President	11/04/11	\$99,043.43	A	0	3/04/15		
6			President	11/04/11	\$97,101.40	A	0	1/01/13		
7			President	11/04/11	\$96,140.00	A	0	4/01/12		
8			President	11/04/11	\$95,000.00	A	0	11/04/11		
9			DIRECTOR, HUMAN RESOURCES	1/26/06	\$59,500.00	A	3	10/03/11		
10			DIRECTOR, HUMAN RESOURCES	1/26/06	\$56,500.00	A	3	1/26/06		
11			DIRECTOR, HUMAN RESOURCES	3/15/98	\$56,500.00	A	3	6/03/02		
12			DIRECTOR, HUMAN RESOURCES	3/15/98	\$56,000.00	A	10	3/15/98		
13			FINANCE & ADMIN. MANAGER	1/02/92	\$50,000.00	A	0	1/02/92		
14			Total for Abbott, John		\$665,784.83					
15	Employee Count: 1		Grand Total		\$665,784.83					

Mass Updates

Archive Vacation/Time Off Request

Archive Vacation and Timeoff Request allows you to clean up the Time and Vacation Request screens. Upon clicking the **Archive** button and completing the process, the archiving cannot be reversed. It is recommended that this function be completed by an HR person only. If not archiving requests, the Vacation and Time Off request screens will begin to respond more slowly.

Button	Function
Archive	This button will archive the requests based on the selection criteria entered. When it's finished archiving, a message will appear. Click on OK to clear the message.
Reset	This button clears the selection criteria.

Mass Delete Requests

This function **PHYSICALLY** deletes the Vacation and/or Time Request records. It **does not delete** the matching info:HR Attendance records. Caution should be exercised if using this function. Traditionally, this function is used to clean up test data. Under regular circumstances, you would not need to use this function.

From Date and *To Date* are mandatory.

Button	Function
Delete	This button will delete the requests based on the selection criteria entered. When it's finished deleting, a message will appear saying how many records were deleted.
Reset	This button clears the selection criteria.

Setup

Change your Password

Abbott, John (221026) | Follow-ups | Reports | Mass Updates | Setup | My Schedule | My Dashboard

Vacation and Sick Time » Change Password

Login User: 221026

New Password:

Conf. Password:

Save | Reset

Employees and Supervisors are able to change their passwords as they please. Passwords are encrypted and cannot be viewed. If you happen to forget your password, it can always be reset in info:HR by the system administrator.

To change the password, type in the *New Password* and *Conf. Password*.

Button	Function
Save	This button saves the new password.
Reset	This button clears the password fields.

Check Profile

Abbott, John (221026) | Follow-ups | Reports | Mass Updates | Setup | My Schedule | My Dashboard | Welco

Vacation and Sick Time » Change Password » Check Profile Status

Check Profile Status

Employee Number:

Login UserID:

[Check Profile](#)

ESS Profile Check List

<p>Employee</p> <p>100% Complete</p> <ul style="list-style-type: none"> ✓ Valid Employee Number ✓ info:HR email setup ✓ ESS/info:HR user id setup ✓ Current Position. ✓ Hours per day ✓ Current Salary ✓ Reporting authority setup ✓ Current Sick Entitlement (Not Hourly Entitlement) ✓ Current Vacation Entitlement (Not Hourly Entitlement) ✓ Current Hourly Entitlement 	<p>Logged In User</p> <p>100% Complete</p> <ul style="list-style-type: none"> ✓ Logged in user with at least 1 or more reports ✓ Logged in user email setup ✓ Logged in user is an employee ✓ Logged in user is a supervisor
--	---

This screen provides the ability for the administrator to ensure the employee profile contains the information required by info:HR and ESS.

Table Master

The screenshot shows the 'Table Master' page in the info:HR system. The page header includes the info:HR logo, 'About info:HR | HR Department | Logout', and 'HR Systems Strategies Inc.'. The breadcrumb trail is 'Employee List > Vacation and Sick Time > Table Master > Abbott, John (221026) > My Dashboard'. A left-hand navigation menu lists various HR functions like 'Employee Basic Information', 'Work History/Compensation', etc. The main content area displays a table of attendance codes with columns for Table Name, Table Key, Key Description, Absent, Seniority, Emerg. Leave, and Inactive. Below the table is a search box for employees and a 'Ready' status indicator.

Table Name	Table Key	Key Description	Absent	Seniority	Emerg. Leave	Inactive
ATTENDANCE CODES	BT	Bereavement time off	Yes	No	Yes	No
ATTENDANCE CODES	CONF	Conference	Yes	No	No	No
ATTENDANCE CODES	COUR	Course	Yes	No	No	No
ATTENDANCE CODES	EXCU	Jury duty	Yes	No	No	No
ATTENDANCE CODES	FD	Floating days off	Yes	No	No	No
ATTENDANCE CODES	FSIC	Family sick time	Yes	No	Yes	No
ATTENDANCE CODES	MA	Medical appointment	Yes	No	No	No
ATTENDANCE CODES	MD	Moving day	Yes	No	No	No
ATTENDANCE CODES	MENT	Mental health day	Yes	No	No	No
ATTENDANCE CODES	OT	Comp time earned	No	No	No	No
ATTENDANCE CODES	OT01	Lieu hours earned	No	No	No	No
ATTENDANCE CODES	OVPD	Overtime paid out	No	No	No	No
ATTENDANCE CODES	PD	Professional development	Yes	No	No	No
ATTENDANCE CODES	PVAC	Planned vacation	No	No	No	No
ATTENDANCE CODES	REG	Regular	No	Yes	No	No
ATTENDANCE CODES	CT	Comp time taken	Yes	No	No	No

The page shows the list of valid table codes defined in info:HR. No maintenance is allowed on this page.

Work Schedule Logic

Overview

info:HR provides the ability to define up to a 4-week rotating Work Schedule for selected employees. A week begins on Sunday and ends on Saturday. When creating a Work Schedule for an employee, the working hours per day needs to be entered. The hours entered in the Work Schedule will override the employees' standard *Hours per Day* as set up in their current position screen. This feature is available only to clients who are not using the Multi-Position module.

Whenever a Work Schedule-defined employee makes either a Time or Vacation Request and enters a *From Date* and *To Date* in the request, the application will calculate the number of hours being requested based upon the employee's Work Schedule and the defined rules for weekends and holidays. A weekend is defined as a Saturday and Sunday. A holiday is defined in info:HR's **Holiday Master**.

Depending upon the *Application Settings* and the *Work Schedule Rules*, the employee may have the ability to modify the requested hours off. Both of those settings also control what happens to a request when it falls on a weekend and/or holiday.

If an employee is a Work Schedule employee and subsequently changes to a non-Work Schedule employee, or has a Work Schedule change, or begins a Work Schedule, these steps should be taken:

1. The employee needs to delete any unapproved vacation or time requests that fall beyond the date of the change using the **Vacation Request** or **Time Request** pages.
2. After HR makes the change, all approved future-dated vacation or time requests need to be deleted by HR via the **Request Authorization** page. This will delete the request and the matching Attendance Master records. This will ensure that any subsequent future-dated requests will have the correct information.
3. The employee can then submit requests using the appropriate rules.

When the current Work Schedule expires, it is recommended that a new Work Schedule record is created, rather than just extending the *To Date* on the existing schedule. Any existing unapproved or approved vacation or time requests that fall within the new schedule will need to be deleted by HR. The employee would then resubmit the vacation or time requests based on the new Work Schedule.

Vacation and Time Request *Hours* are calculated by ESS following the conditions below:

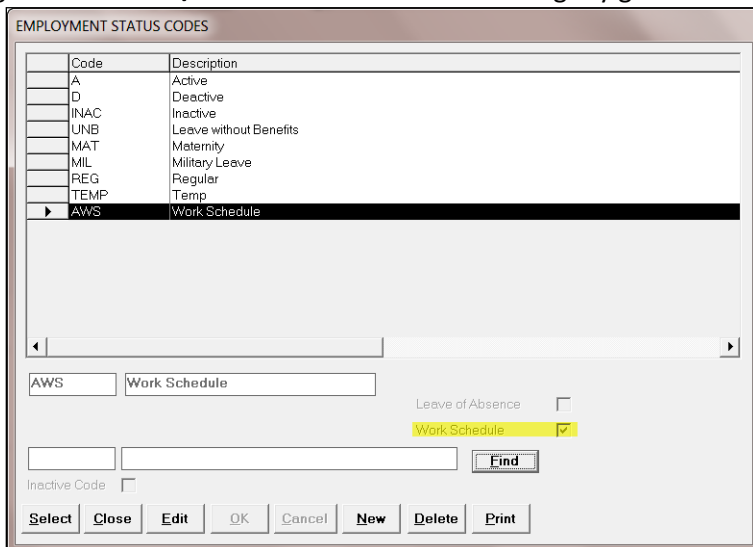
- On a single day request, the user can enter the *Hours*. The *Hours* cannot exceed the hours per day on the Work Schedule.
- For a multi-day request, the *Hours* are calculated based on the employee's Work Schedule. These hours can only be changed if the *Override Hours* option is checked on the **Work Schedule Rule**.
- For a single day Vacation Request reversal, *Hours* can be overridden provided that the *Hours* do not exceed the matching Approved Vacation *Hours*.
- If a Work Schedule employee enters a request that has either the *From Date* or *To Date* falling outside of their Work Schedule, the application will ignore the Work Schedule. The *Hours per Day* as defined in the employee's current position screen will be used. The Work Schedule will be ignored.
- The Work Schedule will ignore the rule if a Time Request is entered for a non-absent Attendance Reason. Absent Attendance Reasons will check the Work Schedule.

Prior to turning this function on, please review in detail the *Work Schedule Rules* and the *Application Settings*. These functions are defined in this document.

info:HR Setup

Employment Status Code

Work Schedules can be created based on one or more combinations of *Employment Status* and/or *Category*. In order to assign an *Employment Status* to a Work Schedule, the *Employment Status Code* must be identified as a Work Schedule status code. To identify Work Schedule *Employment Status Codes*, go to the **Status/Dates** screen. Click on the magnify glass for *Employment Status*.



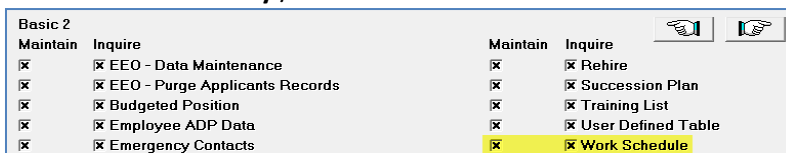
- Click on the *Employment Status Code* that will be using Work Schedule logic.
- Click **Edit**.
- Check **Work Schedule**.
- Click **OK** to save.
- Repeat the above steps if there are more than one code used in Work Schedule.

Note: Once an *Employment Status Code* has been identified for a Work Schedule, all employees that have the *Employment Status Code* assigned to them will need to have a Work Schedule record created for them. It is recommended that you create a new *Employment Status Code* strictly used for Work Scheduled employees.

Security Master

Your security profile must be updated to activate the **Work Schedule Rules** screen. To update your security profile, log into info:HR and:

1. Click on **Setup / Security / Security Master**.
2. Locate your security profile record.
3. Click on **More Security / Basic 2**.

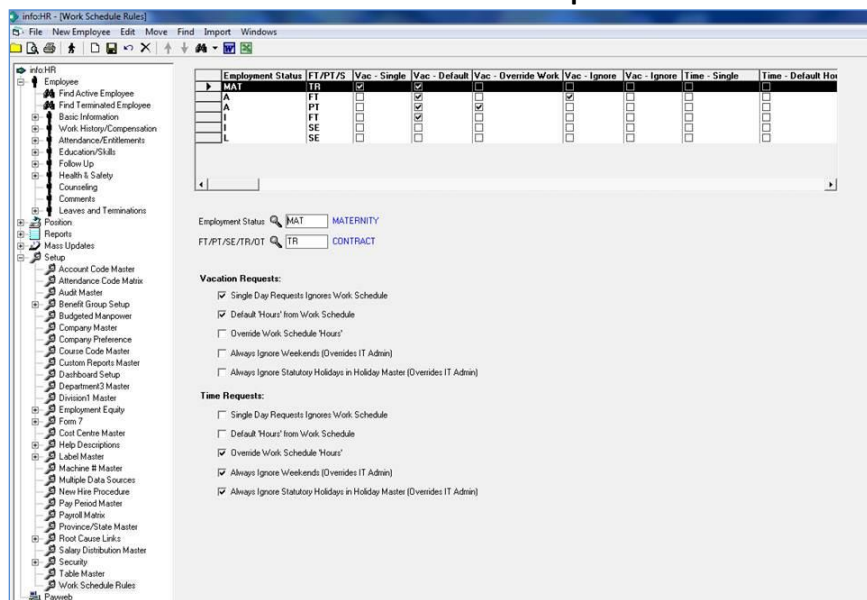


- Click on **Maintain** to inquire and maintain Work Schedules.
 - Click on the Save icon (💾) in the toolbar.
4. Click on **More Security / Reports**.
 - ☑ **Work Schedule**
 - Click on **Work Schedule**.
 - Click on the Save icon (💾) in the toolbar.
 5. To activate the new security profile, log out of info:HR and back into it.

Work Schedule Rules

Prior to creating Work Schedule Rules, the *Employment Status Codes* must be identified, and the security profile updated as previously mentioned.

Work Schedule Rules are found under the **Setup** menu item.



This screen is used to define ‘rules’ applicable to Work Schedule employees. The rule will be applied to ALL employees who match the combination of *Employment Status* and *Category*.

Vacation Requests:

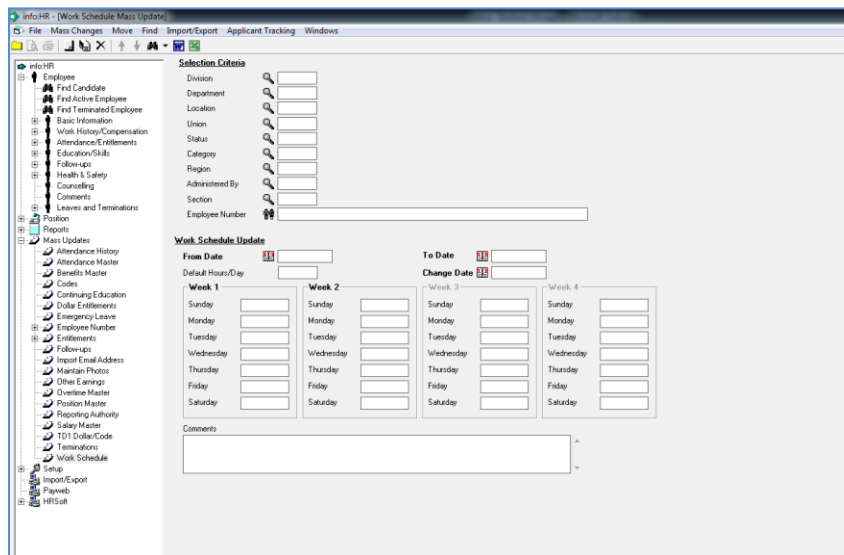
- Single Day Requests Ignores Work Schedule:** If checked, the employee’s Work Schedule is ignored, and the *Hours* are calculated using the employee’s current Position. Caution is advised if checking this option.
- Default ‘Hours’ from Work Schedule:** This option should be checked. Otherwise, the *Hours* are calculated using the employee’s current Position.
- Override Work Schedule ‘Hours’:** Check this option if the employee can override the *Hours* calculated by ESS/MSS. For example: Checked this option if the employee can submit a Vacation Request for 1 day but wants to take off less than a full day. If it is a multi-day request, the *Hours* overridden would consume as many hours as possible based on the schedule. The last day may be not a complete day off. Work Schedule: Monday – 8, Tuesday – 4, Wednesday – 8. A Vacation request is entered. The *Hours* are overridden to 16. If approved, three vacation Attendance Master records are created. They are: Monday – 8, Tuesday – 4 and Wednesday – 4.
- Allows Ignore Weekends (Overrides Application Settings):** If checked, a multi-day Vacation Request will not warn the employee that the date range crosses over a weekend. The *Hours* calculated will include any weekend hours.
- Allows Ignore Statutory Holidays in the Holiday Master (Overrides Application Settings):** If checked, a multi-day Vacation Request will not warn the employee that the date range crosses over a Holiday as defined in the **Holiday Master**. The *Hours* calculated will include any holiday hours.

Time Requests:

- **Single Day Requests Ignores Work Schedule:** If checked, the employee’s Work Schedule is ignored, and the *Hours* are calculated using the employee’s current Position. Caution is advised if checking this option.
- **Default ‘Hours’ from Work Schedule:** This option should be checked. Otherwise, the *Hours* are calculated using the employee’s current Position.
- **Override Work Schedule ‘Hours’:** Check this option should if the employee can override the *Hours* calculated by ESS/MSS. For example: Checked this option if the employee can submit a Time Request for 1 day but wants to take off less than a full day. If it is a multi-day request, the *Hours* overridden would consume as many hours as possible based on the schedule. The last day may be not a complete day off. Work Schedule: Monday – 8, Tuesday – 4, Wednesday – 8. A Course request is entered. The *Hours* are overridden to 16. If approved, three Course Attendance Master records are created. They are: Monday – 8, Tuesday – 4 and Wednesday – 4.
- **Allows Ignore Weekends (Overrides Application):** If checked, a multi-day Time Request will not warn the employee that the date range crosses over a weekend. The *Hours* calculated will include any weekend hours.
- **Allows Ignore Statutory Holidays in the Holiday Master (Overrides Application):** If checked, a multi-day Time Request will not warn the employee that the date range crosses over a Holiday as defined in the **Holiday Master**. The *Hours* calculated will include any holiday hours.

Employee Work Schedule

A Work Schedule must be entered for all employees who match the combination of *Employment Status* and *Category* as entered in the **Work Schedule Rules** table. To set the number of rotation weeks, please see the Company Preferences section of the user manual.



- A rule must have a *From Date* and *To Date* and the dates cannot overlap or be within an existing rule.
- If you want to modify the Work Schedule, first run the **Unapproved or Rejected Vacation/Time Off Requests Report**. This will display a report of all Vacation or Time Off requests that are unapproved or rejected. The employee will need to delete those requests and resubmit once the new Work Schedule Rule has been entered.

Application Setting

In order to turn on the Work Schedule Rules, *Use Work Schedule* must be set to **On**.

56. Use Release 4.0 logic:	Off
57. Use Work Schedule:	On

Other options to review are:

64. Reporting Authority Number for ESS Authorization:	RA1
65. Reporting Authority Number for Timesheet Authorization:	RA1
66. Allow Vacation Exceeded :	No
67. Allow Sick Exceeded :	No
68. Allow Hourly Entitlement Exceeded :	No
69. Allow Comp Time Exceeded :	No
70. Allow Work Schedule Time Exceeded :	No
71. Warn on duplicate requests:	No
72. Allow exceed hours per day.:	Yes

Security Setting	Definition
64	Provides the ability to select which Reporting Authority should be the defaulted supervisor on ESS Requests.
66	If set to No, the employee <u>would not be able to submit</u> a Vacation Request if the <i>Hours</i> will exceed the employee's <i>Vacation Outstanding</i> amount.
67	If set to No, the employee <u>would not be able to submit</u> a Time Request if the <i>Hours</i> will exceed the employee's <i>Sick Outstanding</i> amount.
68	If set to No, the employee <u>would not be able to submit</u> a Time Request if the <i>Hours</i> will exceed the employee's <i>Hourly Entitlement Outstanding</i> amount.
69	If set to No, the employee <u>would not be able to submit</u> a Time Request if the <i>Hours</i> will exceed the employee's <i>Comp Time Outstanding</i> amount.
70	Allows employees to submit a request that would exceed hours identified in their Work Schedule.
71	If set to No, the employee <u>would not be able to submit</u> a duplicate request. A duplicate is defined by finding the same Employee Number/Date/Reason/Hours request. This option is used for both Work Scheduled and non-Work Scheduled employees. If set to Yes, a warning message will pop up if the employee attempts to submit a duplicate request. The employee has the ability to either submit the duplicate or change the request.
72	If set to Yes, employees would be able to submit a request for one day that exceeds their Work Schedule Hours or <i>Hours per Day</i> in the current Position screen. This option is used for both Work Scheduled and non-Work Scheduled employees.

Using Work Schedules in ESS

Vacation Requests Using Work Schedules

Note: Attendance reason code must be marked with an absent Check box for the request to read the work schedule. Any attendance reason code not marked with the Absent Check box will ignore the work schedule.

- When a new **Vacation Request** is opened with the option checked “*Default Hours from Work Schedule*”, the “*Hours per Day*” displayed on the Vacation Request matches the *Hours* entered on the Work Schedule for the day of week entered into the *From Date*.
 - If the *From Date* is not a Work Schedule day, the *Hours Per Day* will not show any defaulted hours.
 - After the *From Date* and *To Date* are entered, the *Hours Per Day* will be calculated based on the Work Schedule.
- In a multi-day request, the Work Schedule hours are used calculate the total hours for the days that fall into the date range.
- If the *Override Work Schedule Hours* option is checked in the **Work Schedule Rule**, the employee has the ability to overwrite the *Hours per Day*.
 - If the request is for multiple days and the employee overrides the hours, the system will consume the hours per day up to the amount entered by the employee.
 - **For example:** A request is made for Tuesday to Thursday for an employee who works 5, 8 and 8 hours for those days. Based on the Work Schedule, the system calculates the hours as 21. The employee overrides the 21 scheduled hours to 17 hours. When the request is approved, the system would apply 5 hours to Tuesday, 8 hours to Wednesday and 4 hours to Thursday.
 - If the overridden hours are changed to be greater than what the system would calculate, the last scheduled day would contain the net amount. This causes the last day to contain more hours worked than what was expected in the Work Schedule.
- The date range entered must fall within the Work Schedule date range for the employee. If any date falls outside of the employee’s Work Schedule date range, the Work Schedule is not used.
 - For example: The Work Schedule is set up from Jan 2013 to May 2013.
 - A Vacation Request for May 15/13 to Jun 5/13 would be treated as a regular request and the Work Schedule hours ignored.
- A Vacation Request cannot across multiple Work Schedules.
 - **For example:**
 - One Work Schedule is from Sept 2012 to Dec 2012 and another is Jan 2013 to Mar 2013.
 - A Vacation Request for Dec 23/12 to Jan 5/13 would be treated as a regular request and the Work Schedule hours ignored.

Time Requests Using Work Schedules

Note: Attendance reason code must be marked with an absent Check box for the request to read the work schedule. Any attendance reason code not marked with the Absent Check box will ignore the work schedule. Example: Comp time worked (OTx) should not be marked with the absent Check box, Comp time taken (CTx) should be marked.

- On a single day request and the *Single Day Requests Ignores Work Schedule* is checked, the application will use the *Hours per Day* from the employee's current Position. Unchecked, the *Hours per Day* are taken from the Work Schedule
- If the request is a multi-day request, the Work Schedule hours are calculated depending upon the *Reason* selected.
 - If the *Reason* selected is a non-absent reason, the system ignores the employee's Work Schedule and the Work Schedule rules. **For example:** The *Reason* is Compensatory Time Earned. This reason is not an absent reason. The Work Schedule would not be used.
 - The above is the same condition whether it is a single day or multi-day request.
 - If the *Reason* entered is an absent reason, the system compares the date range entered on the request to the Work Schedule.
 - A single day request ignores the Work Schedule regardless of the absent setting.
 - A multi day request checks the Work Schedule to calculate the total hours absent.
- The *Override Work Schedule Hours* option in the **Work Schedule Rules** provides the employee an ability to overwrite the system calculated *Hours per Day*.
 - If the request is for multiple days and the employee overrides the hours, the system will consume the hours per day up to the amount entered by the employee.
 - **For example:** A request is made for Tuesday through to Thursday for an employee who works 5, 8 and 8 hours for those days. Based on the Work Schedule, the system calculates the hours as 21. The employee overrides the 21 hours to 17 hours. When the request is approved, the system would apply 5 hours to Tuesday, 8 hours to Wednesday and 4 hours to Thursday.
 - If the overridden hours are changed to be greater than what the system calculates, the last scheduled day would contain the net amount. This would cause the last day to contain more hours worked than what was expected in the Work Schedule.
- The date range entered must fall within the Work Schedule date range for the employee. If any date falls outside of the employee's Work Schedule date range, the Work Schedule is not used.
 - For example: The Work Schedule is from Aug 2012 to Dec 2012.
 - A Vacation Request for Jul 30/12 to Aug 5/12 would be treated as a regular request.
- A Time Request cannot across multiple Work Schedules.
 - **For example:**
 - One Work Schedule is from Sept 2012 to Dec 2012 and another is Jan 2013 to Mar 2013.
 - A Vacation Request for Dec 23/12 to Jan 5/13 would be treated as a regular request and the Work Schedule hours ignored.

Reports ESS Requests – Transaction Audit Report

This report is in info:HR under the **Reports / Attendance & Entitlements** menu. Its purpose is to print an audit trail of all changes, including deletion, that's made against either Time Requests or Vacation Requests.

Selection criteria:

Selection Criteria

Division

Department

Location

Union

Status

FT/PT/SE/TR/DT

Employee Number

Program

Administered By

Section

Shift

Show Vacation Requests

Show Time Off Requests

Report Grouping

Grouping #1

Final Sort

Report format:

Date: 1/23/2013 Time: 2:10:43 PM	Release 4.1 ESS REQUESTS - TRANSACTION AUDIT REPORT	Page: 6 RZESSREQTRNAUDI									
Employee: 1050 Armstrong-Smith, Grant											
Request ID	Request Type	From Date	To Date	Reason	Hours	Transaction Type	Supervisor Email	Action	By Whom	Date of Change	
30	TR	10/15/2012	10/19/2012	COUR	8.00	NR	sales@gmail.com	Armstrong-Smith, Grant Created a request. id=30	1050	10/30/2012	
Employee: 8524 Wessler, Johnaton											
34	TR	12/28/2012	12/28/2012	OT	4.00	NR	sales@gmail.com	System User Created a request. id=34	999999999	12/10/2012	
34	TR	12/28/2012	12/28/2012	OT	4.00	AP	sales@gmail.com	System User Approved request id=34	999999999	12/10/2012	
Employee: 8524 Wessler, Johnaton											
35	TR	12/28/2012	12/28/2012	OT	-2.00	NR	sales@gmail.com	System User Created a request. id=35	999999999	12/10/2012	
Request Types: TR - Time Off Request VR - Vacation Request											
Transaction Types: NR - New Request MB - Modified DB - Deleted AP - Approved APF - Approved Failed RJ - Rejected RS - Resubmitted DA - Resubmitted AR - Archived											

To see this report in info:HR, go to your security profile and enable the report. This function is found under info:HR's **Setup / Security / Security Master**. Once you locate your security profile in the grid, click on **More Settings / Reports**.

ESS Requests - Transaction Audit

Work Schedule

This report is located in info:HR under the **Reports / Attendance & Entitlements** menu. Its purpose is to print the entered Work Schedules.

Selection Criteria

Division

Department

Location

Union

Status

FT/PT/SE/TR/OT

Employee Number

Region

Admin By

Section

From Date To Date

Report Grouping

Grouping #1

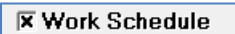
Grouping #2

Final Sort

Report format:

Date: 1/23/2013		Release 4.1							Page: 1		
Time: 2:03:11 PM		Work Schedule Report							RZScheduler		
Employee Number/Name		From Date	To Date	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Comments
7/1/2012											
5506	Smith, Jane	7/1/2012	12/31/2012	0.00	4.00	0.00	5.00	5.00	8.00	0.00	

To see this report in info:HR, go to your security profile and enable the report. this function is found under info:HR's **Setup / Security / Security Master**. Once you locate your security profile in the grid, click on **More Settings / Reports**.



ESS Security Master Settings

ESS Web Module	Timesheet Web Module
<input checked="" type="checkbox"/> Time Request	<input checked="" type="checkbox"/> Timesheet Template Setup
<input checked="" type="checkbox"/> Vacation Request	<input checked="" type="checkbox"/> Timesheet User Template Setup
<input checked="" type="checkbox"/> Request Approval <input checked="" type="checkbox"/> View Own	<input checked="" type="checkbox"/> Delete Timesheets
<input checked="" type="checkbox"/> Request Approval Report	<input checked="" type="checkbox"/> Delete Approved Timesheet
<input checked="" type="checkbox"/> Print Archived Report	<input checked="" type="checkbox"/> Override Employee # Based Security in Timesheet
<input checked="" type="checkbox"/> Archive Vacation/Time Request	<input checked="" type="checkbox"/> Archive Timesheets
<input checked="" type="checkbox"/> Mass Delete Request	<input checked="" type="checkbox"/> Approve Timesheet
<input checked="" type="checkbox"/> Show All Requests	<input checked="" type="checkbox"/> Application Settings
<input checked="" type="checkbox"/> Delete Approved Time Requests	<input checked="" type="checkbox"/> Punch In/Out
<input checked="" type="checkbox"/> Delete Approved Vacation Requests	<input checked="" type="checkbox"/> Timesheet Submission
<input checked="" type="checkbox"/> Enable Request Cancel Button	<input checked="" type="checkbox"/> Timesheet Submission with Equipment Cost
<input checked="" type="checkbox"/> Enable Supervisor Drop-down	<input checked="" type="checkbox"/> Enable Supervisor Drop-down
<input checked="" type="checkbox"/> Show Employee's Reporting Authority only	<input checked="" type="checkbox"/> Show Employee's Reporting Authority only
<input checked="" type="checkbox"/> Delete Future Dated Vacation Requests	
<input checked="" type="checkbox"/> Delete Future Dated Time Requests	
<input checked="" type="checkbox"/> Calendar	
<input checked="" type="checkbox"/> Dashboards	
<input checked="" type="checkbox"/> Quick Info	
<input checked="" type="checkbox"/> Maintain Demographic Data	
<input checked="" type="checkbox"/> Show All Approved/Rejected Requests	
<input checked="" type="checkbox"/> Use Department Security on Request Authorization	
<input checked="" type="checkbox"/> My Co-Workers	
<input checked="" type="checkbox"/> Check ESS Setup	

This screen is found under info:HR's **Setup / Security / Security Master**. Once you locate the employee, click on **More Settings / ESS & Timesheet Web Modules**.

Security Setting	Definition
Time Request	Check if Time Requests can be made.
Vacation Request	Check if Vacation Requests can be made.
Request Approval	Check if the employee can approve/reject Vacation/Time Requests.
Request Approval Report	Check if the employee can print the report.
Print Archived Report	Check if the employee can print the report.
Archive Vacation/Time Request	Check if the employee can archive Vacation/Time Requests.
Mass Delete Requests	Check if the employee can mass delete Vacation/Time Requests.
Show All Requests	Check if you allow the SUPERVISOR to be able to view all Submitted requests for all supervisors.
Delete Approved Time Requests	Check if you allow the SUPERVISOR to be able to delete a Time Request. Deleting a Time Request also deletes the matching info:HR Attendance Master record(s). the SUPERVISOR
Delete Approved Vacation Requests	Check if you allow the SUPERVISOR to be able to delete a Vacation Request. Deleting a Vacation Request also deletes the matching Info:HR Attendance Master record(s).
Enable Request Cancel Button	Check if you allow the employee to cancel an approved request. A CANCEL button will send an automatic negative Vacation or Time Request to the supervisor for approval.
Enable Supervisor Drop-down	Check if you allow the employee to select from a list of pre-defined supervisors.

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Security Setting	Definition
Show Employee's Reporting Authority	Check if you allow the employee to select which Reporting Authority to send Vacation and Time Requests. Only Reporting Authorities assigned on the position screen are shown.
Delete Future Dated Vacation Requests	Check if you allow the employee to delete future-dated APPROVED Vacation Requests.
Delete Future Dated Time Requests	Check if you allow employees to delete future-dated APPROVED Time Requests.
Calendar	Check if you allow employees to view the Outlook-formatted calendar. This calendar is located in the Entitlements section of ESS/MSS. This option does not replace the ESS Report menu Calendar.
Dashboards	Check if you allow the employee to view Dashboards. Some setup is required in info:HR.
Quick Info	Check if you allow the employee to view Quick Info.
Maintain Demographic Data	Check if you allow the employee to maintain their demographic data.
Show All Approved/Rejected Requests	Check if you allow the SUPERVISOR to view <u>All</u> approved and rejected requests in the system.
Use Department Security on Request Authorization	Check if you allow the SUPERVISOR to approve only their department's requests.
My Co-Workers	Check if you allow the employee to view contact information for their Co-Workers.
Check ESS Setup	Check if you allow the user to view employee setup.

Application Settings

Overview

In order to view this option, the following items must be checked:

1. The login user must have their security profile's Application setting checked (**IT Admin**). This setting is found on the Security Master's ESS & Timesheet Web Modules screen:

ESS & Timesheet Web Modules

2. The address line that calls ESS/MSS in the browser must contain the highlighted information:

<http://localhost/IHR53/infohr.aspx?c=t>

Application Settings have the following sections/options:

1. View Logs
2. Test Mail
3. Active Users
4. Test Error Page
5. View Logs By User
6. Reset/Reload Work Table
7. Clean Up Work Table Large Requests
8. Large Requests
9. Check Email Setup
10. User Agent
11. Email Settings
12. Database Settings
13. Display Settings
14. Feature Settings

All users must be logged out of ESS/MSS or Timesheets prior to making any changes here. Use the *Active Users* option to determine whether or not any users are in the system.

On the *Settings* section, a brief help is available by mousing over the setting. For detailed help, please contact our Support Department.

1. SMTP Server IP:	<input type="text" value="smtp.gmail.com"/>	Email Server IP Address
2. SMTP Port:	<input type="text" value="587"/>	

Once all the changes have been made, click on the **Save** button found at the bottom of the screen.

View Logs

Date: Exception Activity [View Logs By User](#)

```

2013-01-10 10:05:51,954|(7732)|DEBUG|IHRWeb.MyBasePage|{(null)}|ul=en-US
2013-01-10 10:05:51,875|(7732)|DEBUG|IHRWeb.MyBasePage|{(null)}|selectedLanguage=en-US
2013-01-10 10:05:51,875|(7732)|DEBUG|IHRWeb.MyBasePage|{(null)}|MyCulture is now set to: en-US
2013-01-10 10:05:51,890|(7732)|DEBUG|IHRWeb.HRLABEL|{(null)}|returning 199 Labels in the memory
2013-01-10 10:05:51,903|(7732)|DEBUG|IHRWeb.HRLABEL|{(null)}|returning 199 Labels in the memory
2013-01-10 10:05:51,954|(7732)|DEBUG|IHRWeb.Infohr|{(null)}|Page is being loadedProvider=SQLLEDB.1;Persist Security Info=False;User
                
```

This page can be view by *Exception* or by *Activity* and sorted by date/time or user. To view a specific day, click in the *Date* box and select a date from the lookup. Click on **View** to see the information. Generally, these logs are used by our Support department to review errors the occurred.

You must log out to exit this function. To view other sections in Application, you will need to re-log back into ESS/MSS.

Test Mail

Test with Gmail Or Your Mail Server

Mail Server:

Port:

SSL

User ID

Password

From:

To:

Message:

[Google](#)

This page is used to test if your email server is functioning properly. Our Support department may request your IT person to run a test if you are experiencing difficulties sending ESS emails. To test:

1. Check one of: Test with Gmail Or Your Mail Server .
2. Complete the remaining boxes.
3. Click on **Send Mail**.
4. Once sent, the status of the email is displayed:
Mail Sent OK, please check your spam or quarantine if it is not in your inbox.
5. If the above message isn't received, there is a problem between your email server and ESS. Your IT department will need to address the issue.

You must close Internet Explorer to exit this function. To view other sections in Application, you will need to re-log back into ESS/MSS.

Active Users

List of users

This list may not be 100% accurate if users have exited the browser without logging out first. Please check the Activity Logs to see if there are any current activities occurring.

There are 4 user(s) on the system.

System User - 999999999 - Login time: 10:06 AM
System User - 999999999 - Login time: 10:22 AM
System User - 999999999 - Login time: 10:36 AM
System User - 999999999 - Login time: 10:46 AM

This page lists all active users or users who have closed ESS without logging off. The example above shows that the System User exited the application without logging off. Once the browser cache is cleared, these users would disappear.

Test Error Page

This screen is used to confirm the error page is enabled. The page will show the details of an error.

Throw Error Throw Linq Context Error

View Logs By User

This provides the ability to filter users activity by log in. This is used for trouble shooting purposes only.

Date: [Abbott, John | Login ID: 221026 Employee ID: 221026] Errors Only Show Execution Time [Search]

Activity Logs

Reset/Reload Work Table

This feature is only used when upgrading to version 5.0 and higher. This will convert request table to a detail table for checking for duplicates and overlapping requests in the system.

This function should only be used if you are upgrading to version 5.0 for the first time. It may take up to 20 minutes to log requests in the work table.

Employee Number: [] [Reset Work Table] [View Only]

This is a HRSS support tool only.

Clean Up Work Table

Clean up the work table provides the ability to clean the request work table. This can be used when request have been deleted previously and the system is still recognizing the request.

Request Work Table Maintenance

Employee Number

Employee Number	Full Name	Number of Records without a request
1014	Anderson, David	5
1050	Armstrong, Grant	11
1051	Adams, Karen	8

Possible reasons for request work table with bad records(records not linked to a request)

- Requests made prior to release 4.2
- Test requests for long period of time
- Requests Archived but for unknown reason it's work records remained
- Mass deletion of request has run but work table has not been cleaned up
- Employee was terminated

If bad records are left in the request work table, Hour per day check may display an exceeding message if the request falls into the same date range as the bad records. Other validation checks may not be accurate as well. (i.e. duplicates, overlapping.)

This is a HRSS support tool only.

Large Requests

This feature shows a list of requests that are 15 days duration or longer in length.

All active requests greater than 15 days.

RefNo	Employee Number	Full Name	Number of Days	From	To	Reason	Hours	Last Date	Last Time	Last User
225	221028	Abel, Alex	16	8/13/2015 12:00:00 AM	8/28/2015 12:00:00 AM	Conference	8.0000	10/6/2015 12:00:00 AM	12:55 PM	221026

Check Email Setup

This feature provides the ability to confirm users are set up in info:HR correctly to ensure email sending in both ESS and Timesheets.

Supervisors & their employees Employees with no login Account Login Accounts with no Email Setup

Supervisors & their employees

This selection shows a list of all Supervisors and employees emails in the system.

Supervisors & their employees

The records below are displayed based on supervisor first and then employees reporting to that supervisor.

If a supervisor does not show up here, the following reasons must be reviewed.

- Supervisor may not have user id set up on the info:HR Setup / Security / Security Master screen.
- Supervisor may not have email address set up on the info:HR Setup / Security / Email Setup screen.
- Supervisor may not have been marked as a supervisor on the info:HR Setup / Security / Email Setup screen.
- Supervisor may not have been set as a Reporting Authority (1-4) for any employee on the info:HR Employee / Work History/Compensation / Position screen.

If an employee does not show up here, the following reasons must be reviewed.

- Employee may not have a current position checked on the info:HR Employee / Work History/Compensation / Position screen.
- Employee may not have any Reporting Authority (1-4) set on the info:HR Employee / Work History/Compensation / Position screen.

You can sort by employee email by clicking on that column heading to find employees with missing emails.

Supervisor	Employee Number	Supervisor Name	Supervisor Email	Employee Number	Employee Name	Employee Email
221026		Abbott, John	support@infohr.com	5001	Halle,William	billh@hrss.com
221026		Abbott, John	support@infohr.com	1012	King,Deborah	debk@hrss.com
221026		Abbott, John	support@infohr.com	221026	Abbott,John	support@infohr.com
221026		Abbott, John	support@infohr.com	1053	Mansglebe,Jayne	jaynem@hrss.net

Employees with no login Account

This selection shows a list of all employees with no user ID or email in the system.

Employees with no User/login Accounts

The following employee does not have a user account in info:HR. If you do not see any records, it means all employees have a user account in the system.

Employee Number	Full Name
10231	Sampson, Harry
5000	Halle, Jenny
1054	Harper, Betsy
2215	JONES, JENNIFER
5984	Sartre, Mary-Ellen
2210	O'Hara, Jeri

Login Accounts with no Email Setup

This selection shows a list of all employees with a user ID and without an email address in the system.

Employees with no User/login Accounts	
The following employee does not have a user account in info:HR. If you do not see any records, it means all employees have a user account in the system.	
Employee Number	Full Name
10231	Sampson, Harry
5000	Halle, Jenny
1054	Harper, Betsy
2215	JONES, JENNIFER
5984	Sartre, Mary-Ellen
2210	O'Hara, Jeri

User Agent

This selection is reserved for HRSS Support.

Test User Agent String:

Mozilla/5.0 (Windows NT 6.1; WOW64; Trident/7.0; rv:11.0) like Gecko

[Check User Age](#)

Not a mobile browser

Admin Setting Details

Email Settings

▼ **Email Settings**

1. SMTP Server IP:	<input type="text" value="smtp.gmail.com"/>
2. SMTP Port:	<input type="text" value="587"/>
3. SMTP User ID:	<input type="text" value="hrsstest"/>
4. SMTP User Password:	<input type="password" value="....."/>
5. SSL:	<input type="checkbox"/> Enabled ▼
6. Override info:HR Email Setup:	<input type="checkbox"/> Enabled ▼
7. Use One Email Account:	<input type="checkbox"/> Disabled ▼
8. Stop ESS/Timesheet email:	<input type="checkbox"/> No ▼

This section is controlled by your IT department. They will have this information. *SSL* should be used if you plan on having employee access ESS (or Timesheets) from outside the organization. *Override InfoHR Email Setup* should be **enabled**. This setting will use global email settings for all ESS/MSS and Timesheets users stored in the `web.config` file. If **Disabled**, ESS/MSS and Timesheets will read email settings from the info:HR Email setup screen. Enabling this option is safer since IT knows the email server information and there is less likelihood of a user entering wrong data or missing data in **Email Setup**.

Database Settings

▼ Database Settings

9. Database Server IP:	<input type="text" value=".SQLEXPRESS"/>
10. INFOHR Database Name:	<input type="text" value="ihr81_bc"/>
11. Database Userid:	<input type="text" value="sa"/>
12. Database Password:	<input type="password" value="••"/>
13. Encryption Method:	<input type="text" value="English"/> ▼
14. Logs:	<input type="text" value="Off"/> ▼
15. Application Root:	<input type="text" value="/IHRWebDN"/>

This section is controlled by your IT department. They will have this information. *Logs* should be turned on. Logging within ESS helps to troubleshoot issues should they arise. *Application Root* is where the ESS (or Timesheet) programs are found.

Display Settings

Display Settings	
16. Login Page Logo:	<input type="text"/>
17. HR Dept. URL:	<input type="text"/>
18. Top Logo:	<input type="text"/>
19. Corporate Colour:	<input type="text" value="green"/>
20. Override Login Menu:	<input type="button" value="Yes"/>
21. Default Option on Login Page:	<input type="button" value="Employee or Manager Self Service"/>
22. Employee Self Serve:	<input type="button" value="Enabled"/>
23. Course Admin:	<input type="button" value="Disabled"/>
24. Timesheet Entry:	<input type="button" value="Disabled"/>
25. Timesheet Without Equipment cost:	<input type="button" value="Enabled"/>
26. Timesheet With Equipment cost:	<input type="button" value="Disabled"/>
27. Punch In/Out:	<input type="button" value="Disabled"/>
28. Timesheet Approval:	<input type="button" value="Enabled"/>
29. View Timesheet History:	<input type="button" value="Enabled"/>
30. Timesheet Archiving:	<input type="button" value="Enabled"/>
31. Path to info:HR Exe:	<input type="text"/>
32. Company Website:	<input type="text" value="http://www.infohr.net"/>
33. Homepage after login:	<input type="button" value="Vac and Sic Entitlement"/>
34. Show System (VAC)Vacation/(SIC)Sick:	<input type="button" value="Show"/>
35. Form Value Collection Key/Value:	<input type="text" value="10000"/>
36. HTML Calendar Cancelled/Rejected Colour:	<input type="text" value="red"/>
37. HTML Calendar Approved Colour:	<input type="text" value="Green"/>
38. HTML Calendar Inprogress Colour:	<input type="text" value="Yellow"/>
39. Login Menu Colour:	<input type="text" value="#daa520"/>
40. Hide Top Menu.:	<input type="button" value="No"/>

Items on this page are controlled by either HR or IT (depending upon the item). Item numbers 21 to 31 enable, disable or hide items on the main menu. A disabled item is still visible but cannot be selected. A hidden item removes the item from the login menu. Items 22, 23 and 27 should be hidden. These functions are not part of ESS/MSS or Timesheets; they are client-specific options.

Below highlights the settings that should be reviewed:

Item	Description
16	This provides the ability to display your organization’s logo on the main login page.
17	This provides the ability to point “HR Department” to an internal URL.
18	This provides the ability for co-branding. The icon will be located beside the info:HR logo and is visible on all pages.
19	This provides the ability to change the color in ESS. The color can be entered in English, RGB or in HEX format.
20	Setting this to Yes allows the user to make changes to items 21-32.
21	This sets the default active screen on the main menu. The user can still access the other menu items by clicking on the menu item.
22	This setting provides the ability to show the Employee Self-Serve radio buttons on the log in page.
23	This setting provides the ability to show the Course Admin radio button on the log in page.
24	This setting provides the ability to show the Timesheet Entry radio button on the log in page.

25	This setting provides the ability to show the Timesheet Without Equipment Costs radio button on the log in page.
26	This setting provides the ability to show the Timesheet With Equipment Costs radio button on the log in page.
27	This setting provides the ability to show the Punch In/Out radio button on the log in page.
28	This setting provides the ability to show the Timesheet Approval radio button on the log in page.
29	This setting provides the ability to show the View Timesheets History radio button on the log in page.
30	This setting provides the ability to show the Timesheet Archiving radio button on the log in page.
31	Reserved for system use.
32	This setting provides the ability to point the home page back to your organization's website address. To activate this, click on your organization name on the login page.
33	This provides the ability to set the 'home' page when employees are logging into ESS. Use the drop-down to select the desired item.
34	If using the standard vacation and sick time entitlement logic, this setting should be set to "Show". If using hourly entitlements logic, this setting should be set to "Hide".
35	Do not change unless instructed by HRSS Support. Microsoft introduced a limit on the number of fields in a form. Sometimes the Timesheets module exceeds that limit so it's necessary to override Microsoft's maximum setting, otherwise Timesheets won't load for the user.
36	This setting provides the ability to change the colour of canceled/rejected requests on the calendar.
37	This setting provides the ability to change the colour of in progress requests on the calendar.
38	This setting provides the ability to change the colour of approved requests on the calendar.
39	This setting provides the ability to change the colour of the radio button box on the login screen.
40	This setting hides the hot links on the top of the page. About info:HR HR Department

Feature Settings

Feature Settings	
41. Flex Time	Enabled
42. Multi-Approval	Enabled
43. Notify HR	Enabled
44. Entitlement Display	Hourly
45. DB Connection Pooling	Disabled
46. Document Types	doc, docx, xls, xlsx, pdf, gif, png, ppt, txt, ppt
47. Show Projected Year-End Accrual	Enabled
48. Codes not allowed on Time request	
49. Single Sign On	Disabled
50. Warn Overlap on Time request	Disabled
51. Timesheet Template Auto Selection	Disabled
52. CC Supervisor on approvals	Enabled
53. Use Server Time	Enabled
54. Number of Days for Followup	10
55. Close Timesheet HTML report	Disabled
56. Show Images	Disabled
57. Send Outlook Calendar	Open
58. Simple Timesheet	Disabled
59. Use Release 4.0 logic	Off
60. Use Work Schedule	On
61. Always Ignore Weekends in ESS	Off
62. Always Ignore Star Holidays in ESS	Off
63. Show Time Field in ESS	No
64. Default Start Time	8:00 AM
65. Default End Time	5:00 PM
66. Transactional Audit	On
67. Reporting Authority Number for ESS Authorization	RAT
68. Reporting Authority Number for Timesheet Authorization	RAT
69. Allow Vacation Exceeded	No
70. Allow Sick Exceeded	Yes
71. Allow Hourly Entitlement Exceeded	No
72. Allow Comp Time Exceeded	No
73. Allow Work Schedule Time Exceeded	No
74. Warn on duplicate requests	No
75. Allow unprocessed hours per day	Yes
76. Show Unprocessed Timesheets	Yes
77. Show Detailed Error	Enabled
78. SSO Helper URL	
79. Allow Past Due Time Requests	Yes
80. Allow Past Due Vacation Requests	Yes
81. Show all employees in Calendar Report	No
82. ESS Mobile URL	
83. Detailed Request Email Subject Line	Yes
84. Disable the Employee Name change in ESS	No
85. Enable Two-Factor Authentication	No
86. Show Bar Charts	Yes

Items on this page are controlled by either HR or IT (depending upon the item).

Item	Description
41	If enabled, the application will use the Flex logic defined in info:HR. Flex codes must be setup in info:HR as Hourly Entitlements using a "+" code. ESS will add or subtract hours using the matching "+" or "-" codes.
42	Enable this setting to turn on "Approve/Forward" option on Request Authorization.
43	Enable this setting if you want HR to be notified whenever employees change their addresses in ESS. The application will send the email to the "Address Change" email addresses defined in info:HR.
44	This setting will default the display of entitlements.
45	This setting is reserved for future development.
46	This setting defines the types of documents can be imported into ESS.
47	Enable this setting if you are using info:HR's "Calculated" feature.
48	Enter the Attendance Reason Codes that you do not want to appear when the employee is doing a Time Request. Codes are entered in capital letters and are separated by a comma.
49	Enable this only if you have set up ESS for single sign on. Enabling this setting is the last step in the Single Sign On for ESS procedure document.
50	Enable this setting if you want ESS to warn employees if they are entering a Vacation or Time Request and there is another request already entered.
51	This setting is used in the Timesheets module. It's enabled if timesheet templates are assigned to each employee.
52	This setting is used to send emails to the employee's supervisor for all approvals. Enable this option if other Supervisors may approve time requests.
53	This option is only used for organizations that span multiple time zones.
54	This option sets the number of days forward that the Follow-ups Overview screen will display pending follow-ups.
55	This option is used by Timesheets.
56	Enabling this option will allow employee photos to be shown.
57	This option will send a calendar request to the requestor's email calendar upon request approval.
58	This setting is used to enable the Simple Timesheet.
59	This option is available if a client does not want the new Vacation and Time request screens or want to use the Work Schedule logic. It is recommended that the setting is <i>Off</i> .

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60	Must be enabled in order to use Work Schedule logic.
61	For non-Work Scheduled employees, this setting will ignore weekends when submitting a Vacation or Time request.
62	For non-Work Scheduled employees, this setting will ignore holidays when submitting a Vacation or Time request. Holidays are defined in info:HR's Holiday Master.
63	This option is reserved for a future enhancement.
64	This option is reserved for a future enhancement.
65	This option is reserved for a future enhancement.
66	This option is used by Vacation and Time Request. It logs all activity that occurs on a request. It is recommended that this setting be <i>On</i> .
67	In ESS, this sets the "Supervisor" based on the employee's Reporting Authority. The default Reporting Authority's name will show on Vacation or Time requests.
68	In Timesheets, this sets the "Supervisor" based on the employee's Reporting Authority. The default Reporting Authority's name will show on the timesheet.
69	This option defines what will happen if the employees submit a Vacation Request that exceeds their outstanding balance. <i>Yes</i> allows employees to submit but warns them. <i>No</i> stops employees from submitting the request.
70	This option defines what will happen if employees submit Time Requests for SICK that exceed their outstanding balances. <i>Yes</i> allows employees to submit. <i>No</i> stops employees from submitting the request.
71	This option defines what will happen if employees submit Time Requests that exceed their outstanding balances of an Hourly Entitlement. <i>Yes</i> allows employees to submit. <i>No</i> stops employees from submitting the request.
72	This option defines what will happen if employees submit a Time Request that exceeds their outstanding compensatory time balance. <i>Yes</i> allows employees to submit. <i>No</i> stops employees from submitting the request.
73	This option defines what will happen if employees submit a Vacation or Time Request that would exceed their Work Schedule. This option is only used on Work Scheduled employees.
74	This setting defines what will happen if a duplicated Vacation or Time Request is received. If duplicates are not allowed, make this setting say <i>No</i> .
75	If set to <i>Yes</i> , the application will issue a warning message when employees submit a Vacation or Time Request that would exceed their <i>Hours per Day</i> as defined in info:HR.
76	Used in Timesheets. If enabled, all submitted timesheets will be displayed on the Approval List page.
77	This option should be enabled for support purposes.
78	SSO Helper URL
79	If set to <i>No</i> , the system will not allow a time request to be submitted for time off prior to the current date.
80	If set to <i>No</i> the system will not allow a vacation request to be submitted prior to the current date.
81	If set to <i>Yes</i> , the Calendar report will display employees even if they have no time booked off for the reporting period.
82	ESS Mobile URL
83	When set to "Yes" the reason code and date range will appear in emails.
84	This feature provides the ability to hide the Bar Charts on the vacation and sick overview screen.
85	Enable Two-Factor Authentication is either turned on off. If it is turned on, a code is emailed to the sign-in's email address and they must enter the code before proceeding viewing ESS.
86	Show Entitlement Bar charts. A bar chart is displayed showing entitlement amounts in either hours or days.