Visipay.Net 13.00 – Employee Self Service (ESS)

A Setup guide for Visipay Administrators

Version 1

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VISIPAY.NET – EMPLOYEE SELF SERVICE (ESS) FOR VISIPAY ADMINISTRATORS

GETTING STARTED

Make sure the following has been set up by either PBT IT services or the company's IT people who have used the notes provided:

1. Outlook or another mail program is setup on the Visipay computer.

2. The ESS website is setup. Make sure that:

- HTTPS and SSL Certificate has been discussed with IT services
- IIS7 (or higher) Windows feature has been installed and enabled with Visipay ESS files.
- DotNet framework 4.5 has been installed.
- SQL Server 2008 (or higher) has been installed.
- MVC 3 has been installed (only for ESS web site).
- MIME Type has been setup so Video plays.
- Loading of website has been tested.

3. Visipay.Net is setup as follows:

- Visipay.Net (12.55 or higher) is installed with Administration Tools.
- A Visipay.Net Common database has been created.
- A Visipay.Net Company database has been created.
- web.config has been configured for the Company Database and Common database.
- A Visipay.Net license that supports using the web has been bought. This licence **must** have as many users as there are employees who will use ESS.
- All employee records have been setup including records for administrators and leave approval officers.

For more information see: http://www.asp.net/mvc and VisipayESS Setup Guide.docx.

EMPLOYEE SELF SERVICE MODULE, ADMINISTRATION MODULE, LOOKUPS AND PAY PROCESSING

General Information:

Each leave approval officer needs to be linked to a leave approval group.

Each employee within Visipay.NET needs to be attached to an approval group.

Each employee within Visipay.NET needs to be assigned a user login, which in turn is assigned a user role that defines their privileges.

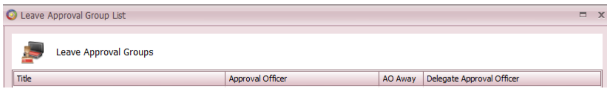
This section also includes documentation on how to add and delete Leave Types, add Leave Types to Staff Types, change Leave Options, change Visible Leave Accruals options, add Public Holidays, use the Leave Calendar, modify employee records and processing approved leave in the pay run.

ADDING AND DELETING APPROVAL GROUPS BASED ON MANAGEMENT HIERARCHY

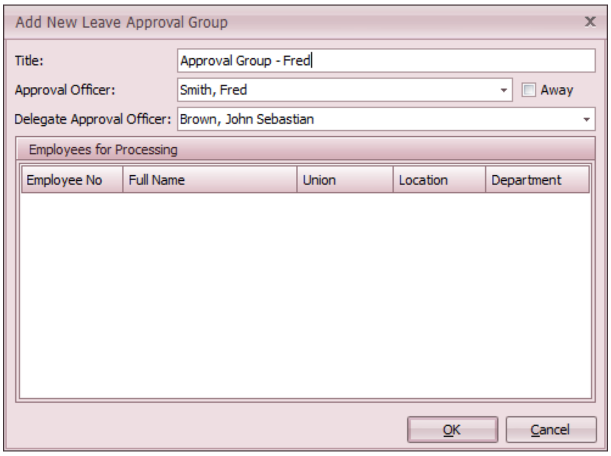
1. Adding an Approval Group

- Click **Approval Groups** on the Self Service tab.

- Click the Right mouse button in the blank area under Title then click **Add** with the Left mouse button.



- Enter a title for Leave Approval Group.
- Click on the drop arrow to choose the employee who is the Approval Officer.
- Click on the drop arrow to choose the employee who is the Delegate Approval Officer.



NB: if the Approval Officer is away you need to tick the 'Away' box so that leave requests go to the Delegate Approval Officer.

Employees for Processing are not added here; you need to add the Approval Group to the employee's record. See page 11.

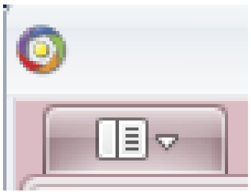
- Click OK.
- Create a second Approval Group (if required).
- Click Close to get out of the Leave Approval Group List.

2. Deleting an Approval Group

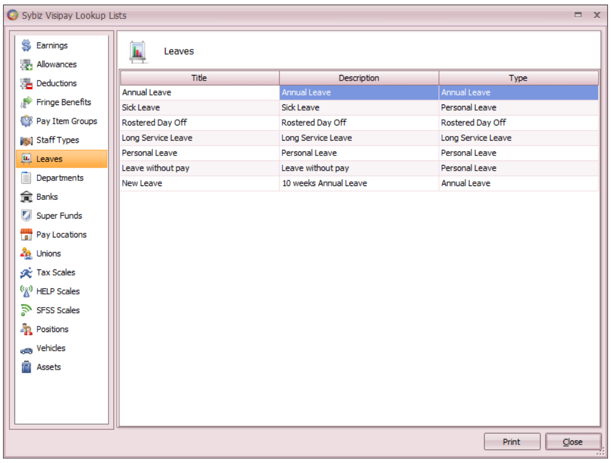
- Click the Right mouse button on the Approval Group then click **Delete** with the Left mouse button if there are no employees attached to the Approval Group.

ADDING LEAVE TYPES

3. Adding Leave Types (if required)



- Click on the drop arrow under the Program Wheel then click **Lookups**….
- Click **Leaves**.
- Click the Right mouse button in the blank area under existing Leaves then click **Add** with the Left mouse button to add a new Leave.



- Give the New Leave a Title and Description then click on the drop arrow to choose a **Leave Type** – either Annual Leave, Long Service Leave, Personal Leave or Rostered Day Off.

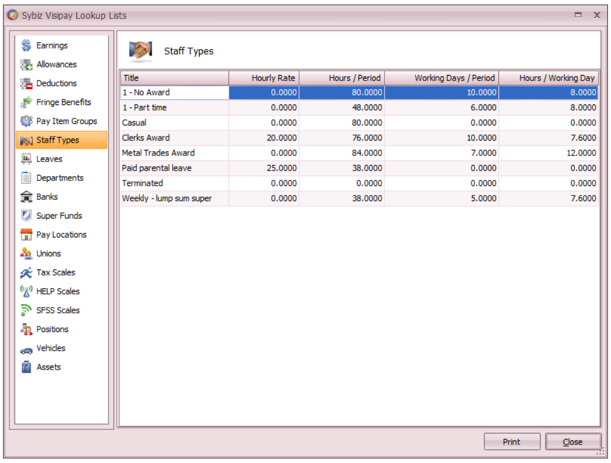
4. Deleting Leave Types

- Click on the drop arrow under the Program Wheel then click Lookups….
- Click **Leaves**.
- Click the Right mouse button on the Leave then click **Delete** with the Left mouse button.

NB: You can only do this if there are no employees attached to the Leave.

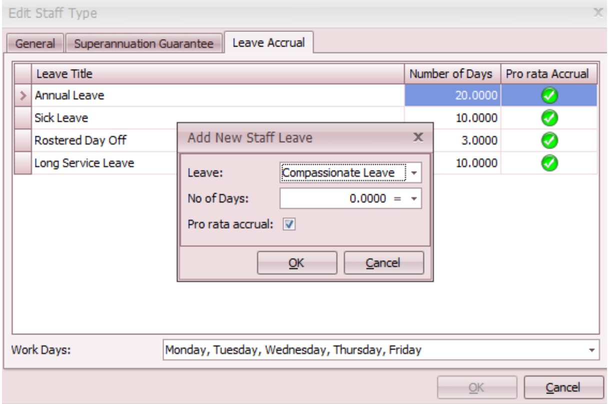
5. Adding Leave Types to Staff Types

- Click on the drop arrow under the Program Wheel then click Lookups….
- Click **Staff Types**.
- Click the Right mouse button on the Staff Type then click **Edit** with the Left mouse button.



- Click the Right mouse button in the blank area under existing Leave Types then click **Add** with the Left mouse button to add a new Leave Type.

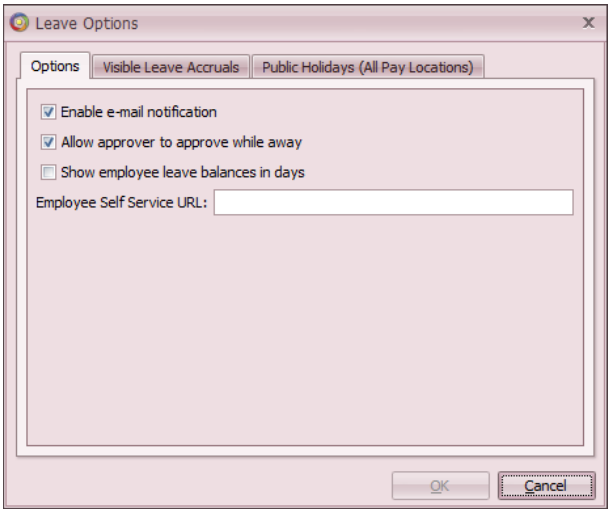
NB: A leave type such as Compassionate leave does not accrue any days but if you want employees to be able to apply for compassionate leave on the ESS website it needs to be set up as a leave accrual.



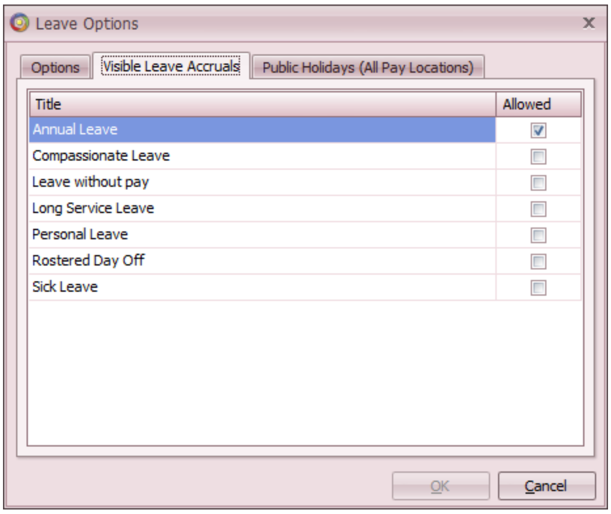
CHANGING LEAVE OPTIONS

6. Changing Leave Options – Enable e-mail notification, Approver away, Leave balances in days and ESS URL

- Click on **Leave Options** on the Self Service tab.
- On the **Options** tab Tick 'Enable e-mail notification' so that employees will get an email telling them whether their leave has been approved or rejected.
- Tick 'Allow approver to approve while away' if you want an approver to be able to respond to leave requests when the approver is out of the office.
- Tick 'Show employee leave balances in days' if you want to display balances in days instead of hours.
- Type in the website address that employees and approvers will use to access ESS on the Internet.



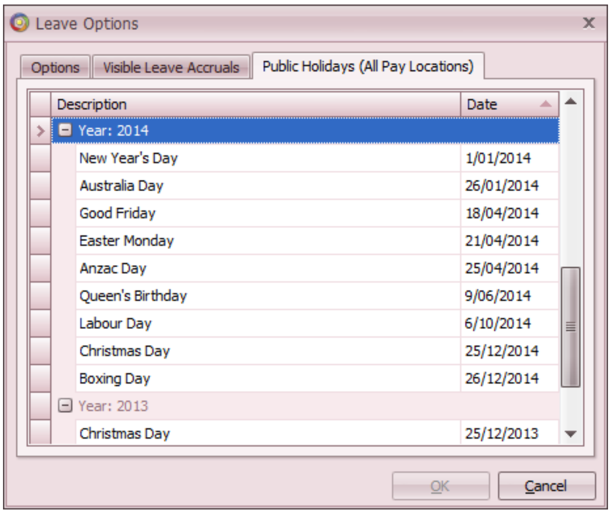
7. Changing Visible Leave Accruals options



- On the **Visible Leave Accruals** tab tick each type of accrued leave to change the visibility on the website of the different Leave Types.

NB: Even if employees can't see their leave accruals they can still apply for any **Leave Type** that has been set up in their **Staff Type**.

8. Adding, Editing and Deleting Public Holidays



It is important to review and set up all national and local Public Holidays. When employees apply for leave and Public Holidays fall within the chosen date range, Visipay will automatically calculate the number of days leave to be taken excluding Public Holidays.

- Click on the **Public Holidays (All Pay Locations)** tab.
- If necessary, click on the + next to a year to display the standard public holidays for that year.
- Click the Right mouse button on one of the holidays and click **Add** with the Left mouse button to create a new Public Holiday, **Edit** to change the name and/or the date of the Public Holiday or **Delete** to remove the Public Holiday.

NB: This can also be done for individual Pay Locations by clicking on the drop arrow under the Program Wheel then clicking **Lookups…., Pay Locations**. When you edit a Pay Location you can click the Right mouse button to Add a Public Holiday for that Location.

USING THE LEAVE CALENDAR

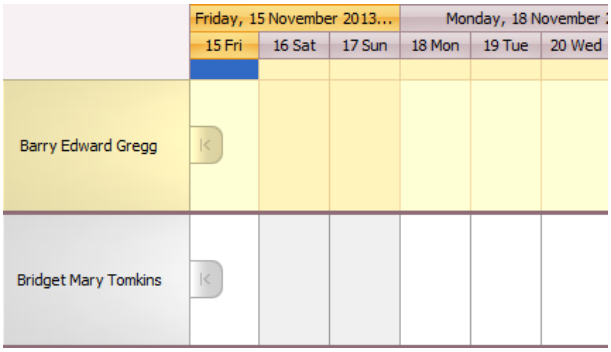
The **Leave Calendar** shows all employees in a style that looks similar to Microsoft Outlook. There are a range of different views and the employee list can be filtered and sorted. You can also print the calendar and add frequently used icons to the Quick Access toolbar.

- Click **Leave Calendar** on the Self Service tab.

NB: The **Leave Calendar** is only available within the Visipay program; it is not available on the ESS website.

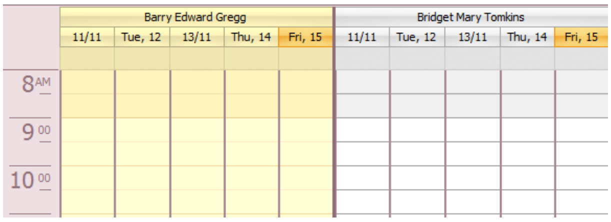
9. The Home tab

- Click on **Gantt View** or **Timeline View**.



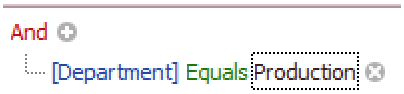
Employees are displayed on the left hand side and the months, days and hours are displayed along the top.

- Click the **Backward** or **Forward** icons to see different weeks of the year.
- Click the **Zoom In** icons several times to see the hours of a day or click the **Zoom Out** icons several times to see the months.
- Click the **Arrange** icons to see a Day View, Work Week View, Week View or Month View.



NB: Employees are now displayed along the top and hours are displayed on the left hand side.

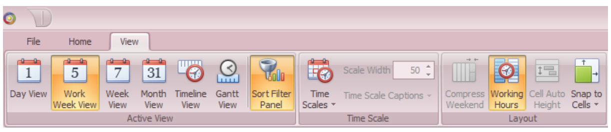
- If you have many employees and they are not all being displayed in the Calendar click several times on the '**-**' sign in the bottom right hand corner of the employee list. The employees then become visible. Use the scroll bar or the scroll arrows to see the rest of the employees.



- To further limit the list of employees, click on the **Sort Filter Panel** on the **Home** tab if it is not already highlighted. The Panel appears at the bottom of the screen.
- Click on the next to **And** to create a new filter.
- Click on **Apply Filter**.

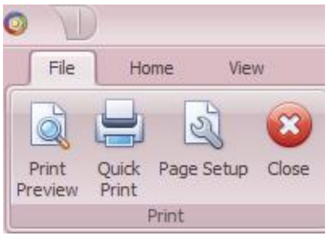
- To sort the list of employees by Last Name, First Name, Code, Department, Staff Type or Location click on the drop arrow to choose one of them and then click **Apply Sort**.

10. The View tab



The **View** tab has some of the same icons as the **Home** tab. However it also has a **Time Scale** which allows you to see the hours on the left hand side in increments of 60, 30, 15, 10, 6 and 5 minutes. It also lets you view just the **Working Hours** instead of the whole day.

11. The File tab



The File tab allows you to **Print Preview**, **Quick Print** or **Page Setup** the current Calendar view.

You can also close the **Leave Calendar** here instead of clicking the X in the top right hand corner.

12. The Quick Access Toolbar

You can add frequently used **Leave Calendar** icons to the Quick Access Toolbar.

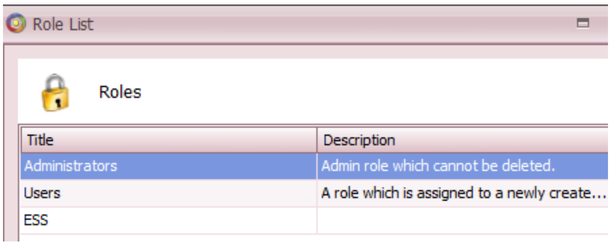
- Click the Right mouse button on any icon then click **Add to Quick Access Toolbar** with the Left mouse button.

MAINTAINING EMPLOYEE SECURITY THROUGH USER ROLES

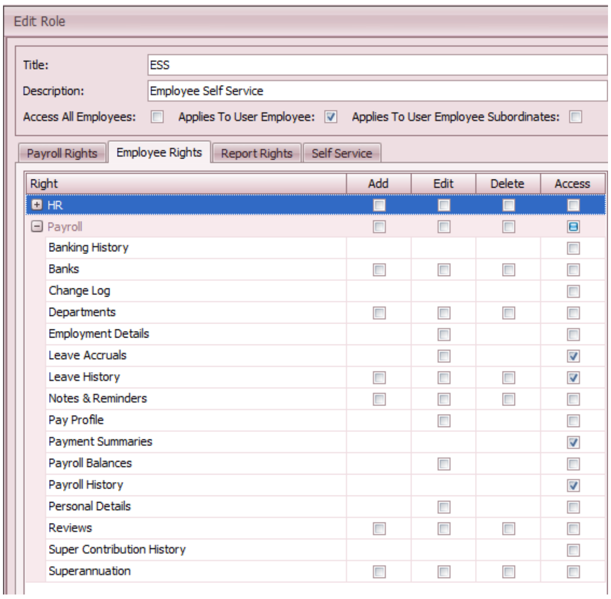
13. Creating user roles

- Click **Roles** on the Administration tab.

- Click the Right mouse button in the blank area under existing roles then click **Add** with the Left mouse button.



- Give the role a title and description.
- Tick 'Applies To User Employee'. **NB:** Make sure that Access All Employees is **not** ticked unless the employee is an Administrator who has the right to view all employees.
- Under Employee Rights tab choose what you want employees to be able to see on the ESS website.



Under Access tick Leave Accruals and Leave History (if they are eligible for Leave) and you may also want them to be able to see their Payment Summaries and Payroll History (pay slips).

NB: These are the only options that are currently available on the ESS website.

Important: You should **not** allow employees to Add or Delete.

Optional:

You may want users to login to the Visipay program so that they can change their bank details, super, dependents and other details. These are not yet available on the ESS website but are scheduled for future development.

When users log in to the Visipay program they will only be able to see their own employee card details if you ticked 'Applies To User Employee'.

14. Deleting user roles

- Click the Right mouse button on the role then click Delete with the Left mouse button.

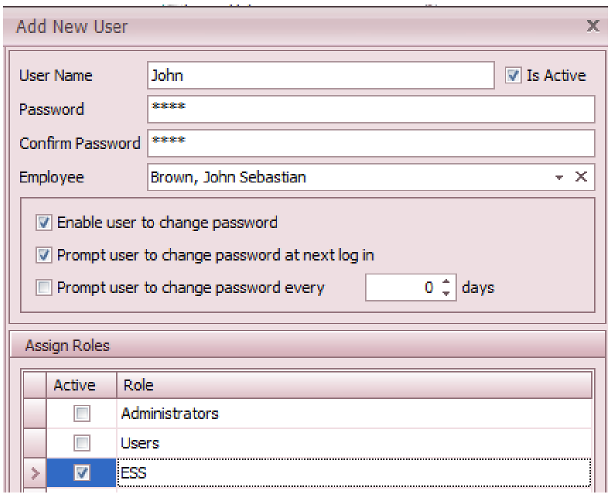
MAINTAINING EMPLOYEE SECURITY THROUGH USER LOGINS

15. Creating user logins

- Click **Users** on the Administration tab.

- Click the Right mouse button in the blank area under User Name then click **Add** with the Left mouse button.

- Assign **Roles** that are appropriate for the User – a user can have more than one Role but they must have a Role that enables them to see at least one of the options that are currently available on the ESS website i.e. their Leave Accruals, Leave History, Payment Summaries and Payroll History if appropriate.



16. Deleting user logins

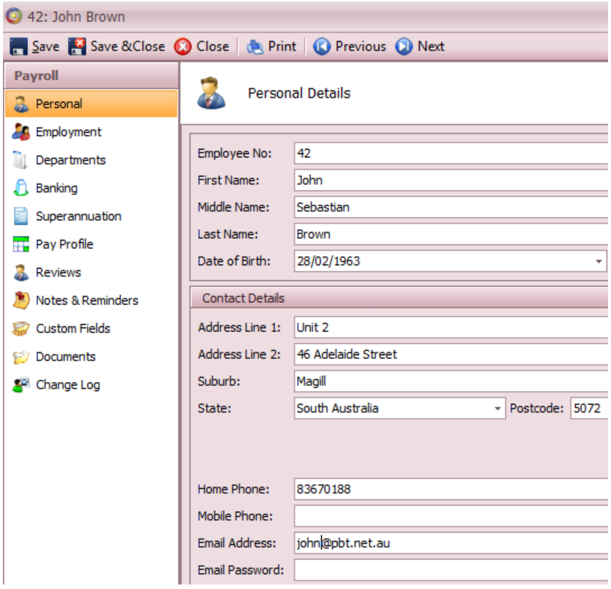
- Click the Right mouse button on the Login name then click **Delete** with the Left mouse button.

CHANGING EMPLOYEE RECORDS SO THAT EMPLOYEES CAN USE ESS

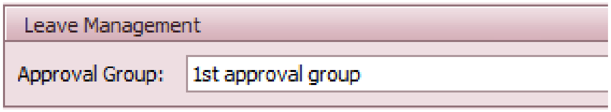
17. Modifying employee records

- Edit the first employee card by double clicking on the employee.
- Under the **Personal** tab make sure that the employee has a valid email address.

NB: Unless the employee has an email address they will not be immediately informed if their leave has been approved or rejected.



- Under the **Employment** tab change the Approval Group in Leave Management based on management hierarchy.

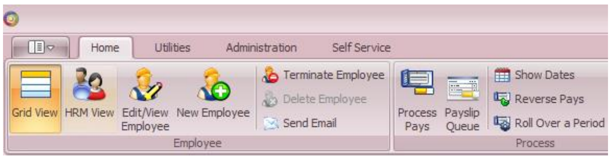


PROCESSING APPROVED LEAVE IN THE PAY RUN

Once a leave approval officer has approved an employee's leave the pay needs to be processed. You can check the Leave Calendar to see whether a leave has been approved or rejected. You can also see that leave approvals are available when you in the Processing Pay screen.

- Click Process Pays.

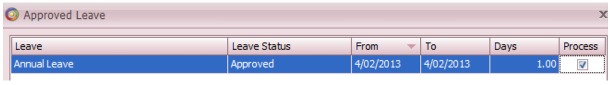
NB: Processing approved leave is usually done in the normal pay run.



- Choose the employee(s) to be paid.
- Click OK.
- Make sure that the pay processing dates are correct and click OK.
- A message will appear at the bottom of the screen saying that 'Leave approvals are available for this employee' if the employee has had their leave approved.

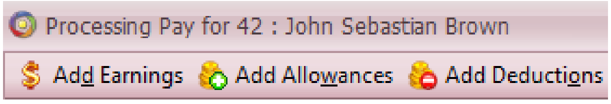
- Double click anywhere on the yellow message bar to archive leave approvals or view which ones to enter on the Processing Pay screen.

- Click process.

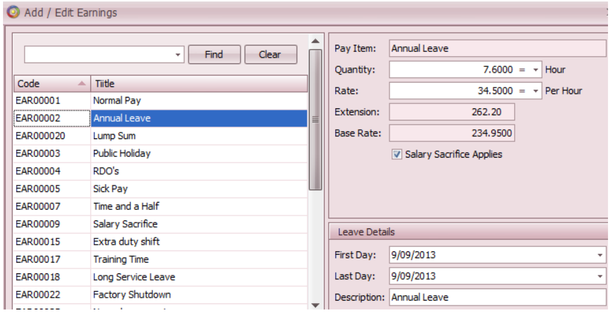


This will not put the leave hours in the pay it will just remove the information from the Approved Leave box.

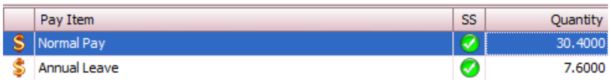
- Click on Add Earnings.



- Click the correct Leave earning and change the quantity (hours).
- Change the Leave Details to reflect the date range of the Leave.



- Modify the pay to reduce the quantity of the Normal Pay by the Leave hours.



- Process the pay.

APPENDIX

TIPS AND TRICKS

The requester submitted the request after the leave was taken. Can this still be entered and approved to reflect correct leave balances?	Yes.
The leave was requested, approved and paid however it didn't happen. How do I fix this?	If the leave request has been processed through the payroll and then later that leave request is cancelled, then it will not automatically adjust the employee's leave accrual. When you process a leave request through the payroll, you have to manually add the leave pay item. So, in this case where the leave request has been cancelled after it has been approved and processed, the employee's leave accrual has to be manually adjusted or a negative leave pay item be processed at 0.00 rate. Keep in mind that if a negative leave pay item is processed, then the employee's staff type has to be temporarily changed to not accrue leave.
The leave was requested, approved and taken however leave type was incorrect. How do I fix this?	If a pay has been processed against the incorrect Earning you will need to do a zero pay with a negative number of hours for the incorrect earning and a positive number of hours for the correct earning
The leave was requested, approved and taken however date on original request was incorrect. Do I need to fix and how?	You are unable to fix this.
What do I need to do with terminated employees?	Delete their user login in Visipay.Net.

ERROR MESSAGE

Server Error in '/VisipayESS' Application. Runtime Error – This caused by the user being logged in for too long without making changes.