User Reference

Employee Self Service v10x

By CMiC



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Employee Self Service – Administrator Guide

Overview – Employee Self Service Administrator Guide

CMiC's Employee Self Service (ESS) is a web-based application that can be used by employees, applicants and administrators to perform the following tasks online.

This guide is for ESS Administrators, and contains documentation about the screens relevant to administrators. For details about the screens relevant to employees, please refer to the ESS Employee's user guide.

For Employees

For employees, the ESS module can be used to:

- view and print pay stubs
- view and update Employee Profile details, such as: address, emergency contacts, skills, certifications and licenses, education, memberships, and tax-relevant information
- submit benefit and deduction elections
- report benefit/deduction qualifying events
- apply for leaves
- view interim and annual evaluations
- submit training requests

Changes and requests are submitted to the employee's manager for approval, and the Payroll and HR modules are updated once the requests are approved.

For Applicants

For applicants, the ESS module is used to:

- create online applicant profile and apply for an open position online
- view application status and history

For Administrators

For administrators, the ESS module is used to:

- set up ESS module
- set up Open Enrollment and Qualifying Events
- approve or deny Change Requests for Employee Profile details
- approve or deny submitted benefit and deduction elections
- approve or deny submitted qualifying events
- approve or deny training requests

- submit job requisitions to HR for new hires
- review applicants' applications

Personal Information

Profile Information

Employee Self Service	ce			Save Submit Cancel 📝 🗈 🏠 Logout						
🌣 🖻 🗈 Employee Self Service	Transaction No E	ffective Date Comment	s	PREV NEXT Profile(Current)						
Search Inst	tructions:			select current profile info, or past Change Request records						
Profile Information		Request for chan	ge of employee profile							
W-4 Information	Effective Date	Comment								
Skills Request, first	st enter	Person	al information							
Certification and its Effective	Last Name Fern	First Name [*] Mike	Middle Name							
Interim Evaluation Annual Evalution Discipline History	Prefix Title Date of Birth 01/01/1977	Suffix to Name Marital Status Single	 S5N (no space/hyphen) 987654321 							
Payment Administration										
Recruiting		Mail	ing Address							
Corporate information	Address Line 1		Address Line 2							
	City		State Illinois							
	Country United States	s of America 💌	ZIP 60633							
	Country United States of America ZIP 60633 Physical Address Address Line 2									
	Address Line 1		Address Line 2							
	City		State							
	Country		ZIP							
			Contract							
	Home Phone		Work Phone							
	Home Fax		Work Fax							
	Cell Phone		Work Cell Phone							
	Page									
	E-Mail Addres	mike.fernandes@cmic.ca								
	Work Email Addres	5								

Employees can use this screen to view and modify their basic profile information.

Then way in which modifications are made is by selecting the current Profile, **Profile** (**Current**), from the dropdown list at the top right corner of the screen, and creating a Change Request. Note, however, only one Change Request is allowed at a time. Once the Change Request is created, it is submitted for approval.

The status of the Change Request can be:

Status	Details
Pending	When a change is made to the current Profile, Profile (Current), and [Save] is clicked, a Change Request record with a status of Pending is created.
Submitted	When a Pending Change Request is submitted using the [Submit] button, its status is changed to Submitted .
Approved	If the Employee's manager approves the Change Request, its status is changed to Approved , the Employee gets an email about the approval, and the approved Change Request will be available to the Employee in ESS.

Rejected If the Employee's manager rejects the Change Request, its status is changed to **Rejected**, the Employee gets an email about the rejections, and the rejected Change Request will be available to the Employee in ESS.

Create Change Request – Change Profile Info

- 1. Select **Profile** (Current) from the drop-down list at the top-right of the screen, as shown above.
- 2. Enter the date for which the change is to be effective via the Effective Date field.
- 3. If required, enter a comment/note for your manager using the **Comment** field, next to the **Effective Date** field.
- 4. Modify the profile information as required.
- 5. Click the [Save] button along the top-right of the screen, which creates a Change Request record.

Once saved, what is displayed is the Change Request, and the fields that were changed are highlighted in green, and the Change Request is set to the Pending state. Also, the **Attachment** section becomes available at the bottom of the screen to attach attachments, using the **[Upload]** button:

XP	Employee Self S	ervice						Save Submit	Delete Cancel	20
	Employee Self Service	Transaction No	Effective Date	Comme	ents			PREV NEXT	208 - 2017-01-	31(Pendi
rch D Em	ployee Self Service Personal Information	208 Instructions: Make changes to the employ	2017-01-04 ee Profile.	Show All Co	nments			saved Change R	Request	
	Profile Information			Request	for change of er	nploye	e profile			
	W-4 Information Td1 Information	Effective Date	01/04/2017 🖄 Com	ment I don't have a ho	me phone, so I only e	ntered m	y cell phone nun	nber.		
	Emergency Contacts Skills				Personal informa	ation			_	
	Degrees	Last Name	Fern	First Name Mi	(e		Middle Name			
	Memberships Interim Evaluation	Prefix Title		Suffix to Name					_	
	Discipline History Payment Administration	Date of Birth	01/01/1977 🖏	Marital Status Si	ngle 💌	SSN (no	space/hyphen)	987654321		
	Corporate Learning Recruiting				Mailing Addre	:55				
	Corporate Information Security	Address Line 1			Address	Line 2				
	Request Approval	City	Chicago			State 1	llinois			
	Auto Approved Request List Manager Change Request	Country	United States of Ame	erica 💌		ZIP	50631			
	Open Enrolment Control Setur				Rhycical Addre	200				
H	Qualify Event Setup									
	Open Enrollment Approval Qualifying Event Approval	Address Line 3	.]	_	Address	s Line 2				
	Dependent Approval Self Service Control Setup	City				State		A		
-0	Open Enrollment Status	Country		•		ZIP				
	Dependent Enrollment Approv Employee Address Change				Contact					
			Home Phone				Work Phone			
			Home Fax				Work Fax			
			Cell Phone 443-4	53-9999		v	/ork Cell Phone			
			Pager					_		
			E-Mail Address mike.	fernandes@cmic.ca						
		Wo	rk Email Address							
					Attachment	_				_
			File Name		Upload Date			Note	Action	
					No Records Four	nd				

6. Once you are sure of the changes, click the [**Submit**] button along the top-right of the screen to set the Change Request to the Submitted state, and to have it sent to your manager.

Note, once a Change Request is submitted, you cannot make further changes to your profile information until the Change Request is either approved or rejected.

7. After a Change Request is approved or rejected, you will be notified via an e-mail, and the approved/rejected Change Request becomes available via the drop-down list at the top-right of this screen, as shown below:

xP	Employee Self Se	rvice			Save Submit Cancel 💽 🏠 Log	jou
\$ = ±	Employee Self Service	Transaction No	Effective Date	Comments	PREV NEXT Profile(Current)	
Search	Go				191 - 2017-01-13(Approved) 193 - 2017-01-13(Approved)	í
Emp	Inves Calf Camilas	Instructions:				1
	ersonal Information	Make changes to the en	nployee Profile.			
TT	Profile Information		Re	equest for change	ge of employee profile	
	HR Information		th _			1
	W-4 Information	Effective Date	Lio Comme	ent		

8. If any comments were entered for the approved/rejected Change Request by your manager, the **Show All Comments** link will be visible, as shown below, when the approved/rejected record is selected via the drop-down list at the top-right of the screen:

xP	Employee Self Ser	vice			🗈 🍙 Logou
\$ I I	Employee Self Service	Transaction No	Effective Date	Comments	PREV NEXT € 194 - 2017-01-13(Approved) ▼
Search	Go	194	2017-01-09	Show All Comments	
Emp	loyee Self Service Personal Information Profile Information	Instructions: Make changes to the em	oloyee Profile.	Request for cha	nge of employee profile
	HR Information W-4 Information Td1 Information	Effective Date 01/09	/2017 Comment	currently don't have a wo	ork number yet, but when provided, I'll enter it via ESS.
	Emergency Contacts			Perso	onal information
	Skills Certification and Licenses	Last Name Pansaki	First Nan	Jasmine	Middle Name

Change Request Approvals

For details, please refer to the *Profile Information – Change Request* section under the following sections: *Manager Self Service > Request Approval Screen.*

HR Information Setup

Create User-Extension Fields for HR Information Screen

UE FIELD	MAINTENAN	CE										💾 Save 🕞	Exit 👔 🤋		- C
UE FIELD MAI	NTENANCE														
View 🕶 🎽	Freeze	Detach 🖸 Search 🖷 Insert 👔	Insert Multiple 🛛 🖶 De	elete 🛞 Workflows	👻 🔒 Rep	oort Options 🛛 👻 🏬 Export	ECM Doo	cuments •	ि <mark>उ</mark> User Ext	ensions					
* System Defined	* Field	Field Description	* Rendering Type	* Data Type	Length	* Lookup Table	Lookup Validated	Required	Updateable	Updateable If Null	Case	Lower Bound Text	Upper Bound Text	Default Va	
	EMPROSHIFT	Preferred Shift: Morning, Afternoor	DEFAULT	Text 💌	9	No LOV used			V	V	Mixed case 💌				^
	OMSTBTEMP	Total Emergency Power (#)	DEFAULT	Numeric	10	No LOV used			V		Mixed case				
	OMSTBTEMP2	Total Emergency Power (KW)	DEFAULT	Numeric 💌	15	No LOV used		[77]	V		Mixed case 💌				
	TAXEXEMPT	Tax Exempt	СНЕСКВОХ 💌	Text	1	Use Valid Data as LOV					Upper case 💌				
	APPEMP_NUM	Applicant Number	DEFAULT 👻	Text 👻	16			V			Upper case 👻				
V	DPDEMPNO	Employee Number	DEFAULT 👻	Text v	16		V	V			Upper case 👻				
V	EMPHISTSEQ	History Sequence	DEFAULT 👻	Numeric 👻	38	No LOV used		1			Mixed case 👻				
7	EMPNUM_ALL	Employee Number	DEFAULT -	Text 👻	16	All Employees	7	7			Upper case 👻				

Pgm: UEFIELD – UE Field Maintenance; standard Treeview path: System > User Extensions > Field Maintenance

Use the Field Maintenance screen in the System module to create the User-Extension Fields to add to the HR Information screen.

For details about the Field Maintenance screen, please refer to the System Data user guide.

Project Management		₽ ⊑ ♠
‡ 🕀 ⊕Project Management Menu	User-Defined Fields	
	User-Defined FieldsTypeActionAction ItemImage: Colspan="2">Image: Colspan="2"Image: Colspan="2">CommunicationImage: Colspan="2"Image: Colspan="2">Image: Colspan="2"Image: Co	
Company Control Project Maintenance Activities User-Defined Log Types User-Defined Logs SdMenu_ACS_logs1 Default Filters User-Defined Fields	Owner Change OrderImage: Change OrderPrequalification UDF TabImage: Change OrderProjectImage: Change OrderRFIImage: Change OrderSubcontractImage: Change OrderSubmittalImage: Change Order	

Add Created User-Extension Fields to HR Information Screen

Using the User-Defined Fields screen of the Project Management module, click the **Employee Profile** option's Edit icon, framed above, to launch the following screen:

Project Manage	ement			D	E 🕯
💠 🖃 🗄 Project Management Menu					Cancel
Saarch	Required fields are indicated with a blue triangle (1)				
bearch		Add User-Defined Field			
Project: CRM Invitation to bid Communication Management	Type Employee Profile User-Defined Field	Lefault Valu	e Sor	t Order	Add
E Document Management	User-Defined Field	Default Value	Sort Order 🔺	Action	
E Contractor Prequalification	Acknowledgement Date	1	I	<u>S</u>	×
Estimate Management	Applicant Number	2	2	5	×
E Cost Management	Effective Date	3	3	<u>S</u>	×
Site Management					
User-Defined Logs					
File Maintenance					
🗈 🛄 Local Tables					

To add a User-Defined Field to the HR Information screen of the ESS module, click the User-Defined Field's arrow , and select the field via the popup.

If the field should have a default value, use the **Default Value** field to enter it, and use the **Sort Order** field to enter the order that the field is to appear in the HR Information screen. Click the [Add] button to finish.

The added fields are now available in the HR Information screen of the ESS module, and on the User Defined Fields tab of the Employee Profile.

W-4 Information

			Review W4 fo	or other years 2010 💌
Transcation No	Date	Comments	() PREV N	нахт 🕞 491 - 2010-11-22 💌
491	2010-11-22	Updating W-4 2010		
Effective Date 10152010	Comment Updating W-4 2010			
				Page 1, go to page 2
Form W-4 (2010) Purpose. Complete Form W-4 so that your emp norme tax from your pay. Consider completing personal or financial studion changes ex- ad sign the form withholding. If you are east ad sign the form to validate 4. Your exemption Pub. 505, Tax Withholding and Estimated Tax. Note: You cannot claim exemption from withhold includes more than 5300 of unearned income (to Basic instructions. If you are not exempt, com Divisibility to the worksheets on page 2	loyer can withhold the correct federal a new Form W-4 each year and when your mpt, complete only lines 1, 2, 3, 4, and 7 for 2010 acyters Pentary 16, 2011. See ding if (a) your income exceeds \$950 and or example, interest and dividends) and (b) in their tax return. yolide the Personal Allowances further adjust your withholding allowances	Complete all worksheets hat apply, However, you may claim fewer (or zero) allowances. For regular wages, withholding matte based on allowances you claimed and may not be i flat amount or percentage of wages Head of NouseHold. Generally, you may claim head of household fling status on your tax return only if you are unmarried and pay more than 50% of the costs of keeping up a home for yourself and your dependenticy to other qualifying dividuals. See Pub. 501, Exemption Standard Deduction, and Fling Information, for information. Tax credits. You can take projected this credits in the account in figuring your allowable number of withholding allowances. Credits for child or dependent care expenses and the child tax credit may be claimed using the Personal Allowances Worksheet below . See Pub. 919, How Do I Adjust IV Tax Withholding, for information on converting your other credits into withholding allowances. Norwage income. If you have a large amount of nonwage income, such as interest or dividends, consider making estimated tax.	payments using Form 104-625, Estimated Tax for Individuals. Of additional tax, IFQ una ke pension or annuly income, see Pub. 3 adjust your withholding on Form W-4 or W-4P. Two centerra/Hultipe jobs. If you have a working agouse or total number of allowances you are entitled to claim on al jobs us 5, form W-4. Your withholding usually will be most accurate when the Form W-4 for the highest paying job and zero allowances ar Pub. 916 or details. Nonresident allen. If you are a nonresident allen, see Note or Instructions for Nonresident Allen, Serber completing the Form. Check your withholding, After your Form W-4 takes effect, us anount you are having withhold compares to your projected tot especially if your earnings exceed \$130,000 (Single) or \$180,00	herwise, you may owe 119 to find out If you should more than one job, figure the sing worksheets from only one a la llowance are claimed on the others. See 392, Supplemental Form W-4 use Pub. 1916 to see how the a lax for 2010. See Pub. 919, 00(Married).
job situations.	ojustments to income, or two-earner/multiple	Personal Allowances Worksheet (Keep for your records.)		
A Enter "1" for yourself if no one else can claim	n you as a dependent			A 1
You are single and have only one B Enter "1" if: You are married, have only one jo Your wages from a second job o	s job; or sb, and your spouse does not work; or r your spouse's wages (or the total of both)	are \$1,500 or less.		в 1
C Enter "1" for your spouse. But, you may choo	ose to enter "-0-" if you are married and have	e either a working spouse or more than one job. (Entering "-0-" may help you avoid having too	little tax withheld.)	c 1
D Enter number of dependents (other than you	ur spouse or yourself) you will claim on your	tax return		D 2
E Enter "1" if you will file as head of househol	Id on your tax return (see conditions under H	lead of household above)		E 1
F Enter "1" if you have at least \$1,800 of child of (Note. Do not include child support payments)	or dependent care expenses for which y b. See Pub. 503, Child and Dependent Care Ex-	γou plan to claim a credit «penses, for details.)		F 1
G Child Tax Credit (including additional child ta: If your total income will be less than \$61,000 (If your total income will be between \$61,000 a	x credit). See Pub 972, Child Tax Credit, for r \$90,000 if married), enter "2" for each eligibl ind \$84,000 (\$90,000 and \$119,000 if marrier	more information. e child; then less "1" if you have three or more eligible children. d), enter "1" for each eligible child plus "1" additional if you have six or more eligible children.		G 2
H Add lines A through G and enter total here. (N	ote. This may be different from the number of	of exemptions you claim on your tax return.)		н 9
For accuracy,complete all worksheets th apply.	nat If you plan to itemize or claim adju If you have more than one job or a Worksheet on page 2 to avoid havi If neither of the above situations ap	stments to income and want to reduce your withholding, see the Deductions and Adjur are married and you and your spouse both work and the combined earnings from all job ing to little tax withheid. ples, stop here and enter the number from line H on line 5 of Form W-4 below.	stments Worksheet on page 2. s exceed \$18,000 (\$32,000 if married) see the Two-Earners/Mu	litiple Jobs
Form W-4 Department of the Treasury Internal Revenue Service	hether you are entitled to claim a certa	Employee's Withholding Allowance Certifica in number of allowances or exemption from withholding is subject to review by of this form to the IRS.	te the IRS. Your employer may be required to send a copy	OMB No. 1545-0074 2010
Type or print your first name and middle initial. Alfred		Last Name Jonas	2 Your social security number 315695012	

Employees can submit their W-4 changes for approval in the W-4 Information screen. Changes may be made in the Original record if it is available for editing. It will be editable if there are no W-4 requests to approve for the employee.

Changes should be made in the Original W-4 and saved. When the change is saved, a new record with the transaction number and current date is created. The Original record will not be editable at this time. Line 3 -Federal Filing Status (Single/Married) must be specified. Line 5 -- "Total number of allowances you are claiming" and line 6 - "Additional amount, if any, you want withheld from each paycheck" may also be entered. Once approved, the Employee Profile will be updated with lines 3, 5 and 6, an employment history record will be created and the Original W-4 will be editable again.

Upon approval, a new employment history record is created in Payroll. The Federal Filing Status on the Tax tab of the Employee Profile will be updated with the value in line 3 of the W-4. The Primary Exemptions field on the Tax tab of the Employee Profile will be updated with line 5 of the W-4. Federal Withholding tax will be inserted in the Overrides pop-up on the Tax tab of the Employee Profile with the value entered in line 6 of the W-4. The Tax Amount will be the value from line 6 and the Amount Type will be "00" (Additional Tax).

To delete a saved W-4, press the [Delete] button. The Original W-4 will become available for editing and submission at this time.

To submit a modified W-4 for approval, press the [Submit] button. Once submitted, the W-4 will appear in the Personal Information Change Request Approval screen to be approved.

TD1 Information

Transation No Effective Date <i>r</i> employer or pager still use this form to determine to d the stack before comparing this form. Compares to strane	010113	Date	Comments Comment TD1 Jonn Smith		THE PREV NEXT	r 🗉 Original
Effective Date in employer or pager will use this form to determine th d the basic before completing this form. Complete t st Name	010113		Comment TD1 John Smith			
r employer or payer will use this form to determine t the back before completing this form. Complete t Name						
r employer or payer will use this form to determine to d the back before completing this form. Complete t t Name						Page 1, go to pa
1Name	e amount of your tax deductions. his form based on the best estimate of	your circumstances.	2012 PERSONAL TAX CREDITS RETURN			TD1
	First name and ini	ta(6)		Date of Birth(YYYYMM/DD)	Employee Number	
itson	Suzette	A.		1975-04-30	SWC-WK-SAL3	
ress including postal code				For non-residents only-	Socall Insurance number	
				US	202303404	
						-
asic personal amount - Every resident of Canada can	claim this amount. If you will have more that	n one employer or payer at the same time in 20	12, see "More than one employer or payer at the same time" on the next page. If yo	u are a non-resident, see "Non-residents" on the next page.		10,882
niid amount - Either parent (but not both), may claim 5 ed to claim the "Amount for an eiligible dependant" on ii	2,191 for each child born in 1995 or later, th re 8 may also claim the child amount for tha	at resides with both parents throughout the yes t same child.	ar. If the child is infirm, add \$2,000 to the claim for that child. Any unused portion o	an be transferred to that parent's spouse or common-law partner. If the child does not	t reside with both parents throughout the year, the parent who is	
je amount – if jou will be 65 or older on December 31.	2012, and your net income for the year from	all sources will be \$33,864 or less, enter \$6,7	20. If your net income for the year will be between \$33,884 and \$78,684 and you wa	nt to calculate a partial claim, get the TD1-WS, Worksheet for the 2012 Personal Ta	Credits Return, and complete the appropriate section.	
ansion income amount – if you will receive regular pe	nsion payments from a pension plan or fund	(excluding Canada Pension Plan, Quebec Pe	ension Plan, Old Age Security, or Guaranteed income Supplement payments), ente	r \$2,000 or your estimated annual pension income, whichever is less.		
ultion, education and textbook amounts (full time enrolled part time, enter the total of the tuition fees you w	and part time) – If you are a student enrol II pay, plus \$400 for each month that you wi	led at a university or college, or an educational I be enrolled, plus \$65 per month for textbooks	I institution certified by Human Resources and Skills Development Canada, and yo If you are enrolled part time and do not have a mental or physical disability, enter	u will pay more than \$100 per institution in tuition fees, complete this section. If you ar the total of the tuition fees you will pay, plus \$120 for each month that you will be enroll	re enrolled full time, or if you have a mental or physical disability and led part time, plus \$20 per month for textbooks.	
isability amount - If you will claim the disability amount	on your income tax return by using Form T	2201, Disability Tax Credit Certificate, enter \$	7,546.	· · · · · ·		
pouse or common-law partner amount – if you are a 822 or more (\$12.822 or more if he or she is infirm), you	upporting your spouse or common-law part cannot claim this amount.	ner who lives with you, and whose net income f	for the year will be less than \$10,822 (\$12,822 if he or she is infirm) enter the diffe	ence between this amount and his or her estimated net income for the year. If your sp	ouse's or common-law partner's net income for the year will be	
mount for an eligible dependant – If you do not have ble dependant's net income for the year will be \$10,822	a spouse or common-law partner and you si or more (\$12,822 or more if he or she is infl	upport a dependent relative who lives with you, rm), you cannot claim this amount.	and whose net income for the year will be less than \$10,822 (\$12,822 if he or she i	s infirm and you did not claim the child amount for this dependant), enter the difference	e between this amount and his or her estimated net income. If your	
aregiver amount - If you are taking care of a dependar rent or grandparent (aged 65 or older), enter \$4,402 (\$8 lative (aged 15 or older) who is dependent on you becau	t who lives with you, whose net income for t 402 if he or she is infirm) or e of an infirmity, enter \$6,402.	ne year will be \$15,033 or less, and who is eith	er your or your spouse's or common-law partner's:			
e dependant sinet income for the year will be detiven sin Amount for infirm dependants age 18 or older – if y wen \$6,420 and \$12,822 and you want to calculate a part	5,005 and \$19,455 (\$15,005 and \$21,455 if it ou support an infirm dependant age 18 or of al claim, net the TD1-WS, and complete th	e or one is initially and you want to calculate a ider who is your or your spouse's or common-li e anomoriste section	partial claim, get the 1D1-WS, and complete the appropriate section. Iaw partner's relative, who lives in Canada, and whose net income for the year will	te \$6,420 or less, enter \$6,402. You cannot claim an amount for a dependant you clair	med on line 9. If the dependant's net income for the year will be	
mounts transferred from your spouse or commo	-law partner - If your spouse or common-	aw partner will not use all of his or her age an	rount, pension income amount, tuition, education and testbook amounts, disability a	mount or child amount on his or her income tax return, enter the unused amount.		
mounts transferred from a dependant – if your dep	endant will not use all of his or her disabilit	amount on his or her income tax return, enter	the unused amount. If your or your spouse's or common-law partner's dependent	child or grandchild will not use all of his or her tultion, education, and textbook amount	ts on his or her income tax return, enter the unused amount.	
FOTAL CLAIM AMOUNT - Add lines 1 thr	ugh line 12. Your employer or payer will us	e this amount to determine the amount of your t	ax deductions.			10

Employees can submit their TD1 changes for approval in the TD1 Information screen. Changes may be made in the Original record if it is available for editing. It will be editable if there are no TD1 requests to approve for the employee.

Changes should be made in the Original TD1 and saved. Completing the form allows tax deductions to be reduced if the employee is eligible for tax credits other than the basic personal exemption. When the change is saved, a new record with the transaction number and current date is created. The Original record will not be editable at this time. Once approved, the Employee Profile will be updated, an employment history record will be created and the Original TD1 will be editable again.

Upon approval, a new employment history record is created in Payroll. To delete a saved TD1, press the [**Delete**] button. The Original TD1will become available for editing and submission at this time.

To submit a modified TD1for approval, press the [**Submit**] button. Once submitted, the TD1 will appear in the Personal Information Change Request Approval screen to be approved.

Emergency Contact

Employee Self Service					Save	Submit	Cancel	🕻 🗈 🍙 Log
Transaction No	Date	Comments					I PREV	NEXT D Current
	2017-02-02							
Instructions: How to make a change request for emergence	y contacts							
Effective Date 020217	20	Commer	ıt]
First Name	Mary	Last Name Ros	35	Middle Name				
Relation	Relative1 💌	Priority Hig	h 💌	Sex	Female 💌			
Phone	454-864-8877	Alter Phone		Cell Phone				
Page	r	Fax		E-Mail Address				
Address Line	565 Sunflower Lane							
Address Line 2	2							
Address Line 3	3							
ZII	66575							
State		Country Un	ted States of America 💌			Delete 1	this record	
							+]

Emergency Contacts may be updated in this screen.

To add a new Emergency Contact, press the blue Add icon \clubsuit , enter an **Effective Date** and contact details. When done, press the [**Save**] button. A Pending record will be created to be submitted.

To remove an Emergency Contact, check the **Delete this Record** checkbox. When done, press the [**Save**] button.

To submit the Emergency Contact request for approval, press the [**Submit**] button. The Emergency Contact submitted will be available in the Personal Information Change Request Approval screen to be to be approved.

Skills

Employee S	Self Service			Save	Submit Delete	Cancel 🛛 🖓 🕻	🗈 🍙 Logou
Transaction	No	Date	Comments			PREV NEXT 🕨	Driginal 🔻 🔺
Effective Date	Comment			 	D	eleted Change	d 🛛 Added
Instructions:							
How to make a change requi	est for skills						
Skill Code	SKIIIS	Skill Descrip	tion	Experience (Months)			
Skills on file				,,		Select	
Skills to be added:						Select	
Skills to be deleted:						Select	
Other skills in system						Select	
FORKLIFT	Forklift]			
PLUMBING	Plumbing						_
ROOFING	Roofing						
GROUNDS	Groundskeeper						
ZZ-CARP	Carpenter			1			
ZZ-ELE	Electrical Apprentice						
ZZ-CUST	Customer Service						
APP-WIR	Wiring Apprentice						
RV-OIL	RV-OIL Mechanic						
ROOFER	Roofer						
AUTOCAD	Auto Cad Designer E	ingineers					
DRYWALL	Drywall, Mudding an	d Plasterin		1			

Employees' skills may be updated and submitted for approval. The **Skills on file** section will display skills that are currently set up on the Employee Profile.

To create a request, enter the **Effective Date**. A comment is optional. To add skill, search for it, enter the number of months of experience, and check the **Select** checkbox beside the skill.

Skills that are not in the system may be manually entered in the section below the **Other skills in system** section.

To remove skills, uncheck the Select checkbox beside the skills.

The skills to be added will be displayed in the **Skills to be added** section. A new record with the transaction number and current date will be created, and the Original record will not be editable. The Skills to be removed will be displayed in the **Skills to be deleted** section.

To delete a saved request, press the [**Delete**] button. To submit the request, press the [**Submit**] button, and use the [**Save**] button to save when finished.

If the **Skill Auto Approve** checkbox is checked in the Self Service Control Setup screen, the request will be automatically approved, and will be displayed in the Auto Approved Request List screen with a Submit Status of "**A**". If the checkbox is not checked, the request will not be automatically approved, and it will be displayed in the Personal Information Change Request Approval screen to be approved. It will also be displayed in the Auto Approved Request List screen with a Submit Status of "**S**".

Once approved, the skills added will be displayed in the **Skills on file** section, and the Original record will be editable again. The Original record will be updated with the changes that were approved, and the Skills will be updated in the Employee Profile also. Press the [**Skills**] button on the Employee Profile to view the updated skills.

If the Skills request was rejected, the record with the same transaction number will be editable for further changes.

Certifications and Licenses

XP Emp	loyee Self Service				Save Submit Delete Ca	ncel 🛛 🕻 🖬 🗘 Logout
Tra	ansaction No	Date	Comments		(<u> </u>	PREV NEXT 🕨 Original 🔻
Effective Date	Comment				D	eleted Changed Added
Instructions:	and convert for contiferat	- diseases				
Request for cha	inge request for certificates/	censes				
Code		Description		State	Effective Date	
Certificates/Licens	ses on file					Select
Certificates/Licens	ses to be added:					Select
Other certificates/	licenses in system					Select
PMP	Project Management C	ertificate				Select
FORKLIFT	Basic Forklift					
ZZ-SAFETY1	Basic Safety Traiining					
SMI002	Smith Certification - 4	YR				
PENG	Professional Engineer	ng		A		
DRUG	Drug Testing					
EFA	Esseintial Function An	alysis			1	
SAFETY	Safety Certificate			*	100	
If certificates/licen	ises are not in the system	n, please specify here:				

Employees' certifications and licenses may be updated and submitted for approval. The **Certificates/Licenses on file** section will display certificates and licenses that are currently set up on the Employee Profile.

To create a request, enter the **Effective Date**. A comment is optional. To add a certificate/license, find it, enter the **State** and its **Effective Date**, and check its corresponding **Select**.

Certificates/Licenses that are not in the system may be manually added by checking the **Other Certificates/Licenses in system** checkbox, then entering their details in the textbox with the caption, "**If certificates/licenses are not in the system, please specify here**".

To remove a certificate/license, uncheck its corresponding **Select** checkbox. When done, press the **[Save]** button.

The certificates/licenses to be added will be displayed in the **Certificates/Licenses to be added** section. A new record with the transaction number and current date will be created, and the Original record will not be available for editing. The certifications/licenses to be deleted will be displayed in the **Certificates/Licenses to be deleted** section.

To delete a saved request, press the [Delete] button along the top of the screen.

To submit the request, press the [**Submit**] button. If the **Certificate/License Auto Approve** checkbox is checked in the Self Service Control Setup screen, the certificate/license request will be automatically approved, and will be displayed in the Auto Approved Request List screen with a Submit Status of "**A**". If the checkbox is not checked, the certificate/license request will not be automatically approved, and it will be displayed in the Personal Information Change Request Approval screen to be approved. It will also be displayed in the Auto Approved Request List screen with a Submit Status of "**S**".

Employee Self	Service			Back 🄀 🖬 🔓 Logout
Transaction No	Date	Comments		● PREV NEXT ► 214-2017-02-06 ▼
214	2017-02-06			
Effective Date 2017-02-06	Comment		1	Deleted Changed Added
Request for change of	certificates/licenses			
Certificates/Licenses on file				
Code	De	escription	State	Effective Date
Certificates/Licenses to be adde	ed:			
PMP	Project Management Certificate		American Samoa	2016-02-02
Certificates/Licenses to be dele	ted:		· · · · · ·	
Other certificates/licenses in sy	stem			
FORKLIFT	Basic Forklift			
ZZ-SAFETY1	Basic Safety Traiining			
SMI002	Smith Certification - 4 YR			
PENG	Professional Engineering			
DRUG	Drug Testing			
EFA	Esseintial Function Analysis			
SAFETY	Safety Certificate			
If certificates/licenses are not in	the system, please specify here:			
welding				
		Attachment		
File	Name	Up No Records Found	oad Date	Note

Once approved, the certificates/licenses added will be displayed in the **Certificates/Licenses on file** section, and the Original record will be editable again. The Original record will be updated with the changes that were approved. The Certificates/Licenses will be updated in the Employee Profile, and to view them, press the **[License/Cert]** button on the Employee Profile for the updated certificates/licenses.

If the Licenses/Certificates request was rejected, the record with the same transaction number will be editable for further changes.

Degrees

хP	Employee Self Ser	vice		Sav	ve Submit Dele	te Cancel 📝	1	n Logout
	Transaction No	Date	Comments			PREV NEXT (€ Or	riginal 🔻
Effective Date	e 🔯 Con	nment				Deleted Cha	inged	Added
Instruction How to make	ns: e a change request to char	nge education information.						
Request fo	or change of educatio	n information	Field of Study	he = 416 + 41 =	De mar e Marana	Xeen Completed		
Code Education in	Description	Course	Field of Study	Institution	Degree Years	Year Completed		Select
Education ty	pe to be added:							Select
Education ty	pe to be deleted:							Select
Other educa	ation types in system							Select
B.ARCH.	Bachelor of Architecture	Other 🔻		American Payroll Association 🔻				
ELEC.TRDE	Electrical Trades	Other 🔻		American Payroll Association 🔻				
ENGINEER M	Master of Engineering	Other 🔻		American Payroll Association 🔻				
GRADE	Grade School	Other		American Payroll Association 🔻				
M.ARCH.	Master of Architecture	Other 🔻		American Payroll Association 🔻				
N/A	Not Applicable	Other 🔻		American Payroll Association 🔻				
SAFECERT	Safety Certificate	Other		American Payroll Association 🔻				
TECHCERT	Technical Certification	Other 🔻		American Payroll Association 🔻				
If education	type is not in the system,	please specify here:						

This screen is used to view and update an Employee's education information.

The **Education information on file** section displays degrees/diplomas that are currently set up in HR via the Degrees Maintenance screen (standard Treeview path: *HCM* > *File Maintenance* > *Degrees*).

To create a request, enter the **Effective Date**. A comment is optional. To add a degree/diploma, search for it, check its corresponding **Select** checkbox, select the **Course**, enter the **Field of Study**, select the **Institution**, and fill out the **Degree Years** and **Year Completed** fields.

Degrees that are not in the system may be manually added by checking the **Other education types in system** checkbox, then entering their details in the textbox with the caption, "**If education type is not in the system**, **please specify here**".

The Degrees to be added will be displayed in the **Education type to be added** section. A new record with the transaction number and current date will be created, and the Original record will not be available for editing.

x₽	Employee Self Servic	e				Back 🗗 🗈	n Logout
	Transaction No	Date	Comments		I PR	EV NEXT 1 216-2017	-02-06 🔻
	216	2017-02-06					
Effectiv	ve Date 2015-10-05	Comment			Deleted	Changed	Added
Request f	or change of educat	ion information					
Education info	ormation on file						
Code	Description	Course	Field of Study	Institution	Degree Years	Year Completed	
Education typ	be to be added:						
B.ARCH.	Bachelor of Architecture	Bachelor Degree 🔹	Engineering & Technology	American Payroll Association 💌	4	2006	
Education typ	to be deleted:						
ELEC.TRDE	Electrical Trades	Other		American Payroll Association			
ENGINEER M	Master of Engineering	Other		American Payroll Association V			_
GRADE	Grade School	Other		American Payroll Association V			_
M.ARCH.	Master of Architecture	Other		American Pavroll Association V			_
N/A	Not Applicable	Other		American Payroll Association V			-
SAFECERT	Safety Certificate	Other 🔻		American Payroll Association 👻			-
TECHCERT	Technical Certification	Other 🔻		American Payroll Association V			-
If education ty	ype is not in the system, ple	ase specify here:				_	
			Attachme	ent			
	File Name		No Records Fo	Upload Date		Note	

The Degrees to be deleted will be displayed in the **Education type to be deleted** section.

To delete a saved request, press the [Delete] button.

To submit the request, press the [Submit] button.

If the **Education Auto Approve** checkbox is checked in the Self Service Control Setup screen, the Change Request will be automatically approved, and it will be displayed in the Auto Approved Request List screen with a Submit Status of "**A**". If the checkbox is not checked, the Degrees request will not be automatically approved, and it will be displayed in the Personal Information Change Request Approval screen to be approved. It will also be displayed in the Auto Approved Request List screen with a Submit Status of "**S**".

Once approved, the degrees added will be displayed in the **Education information on file** section, and the Original record will be editable again. The Original record will be updated with the changes that were approved.

If the Change Request was rejected, the record with the same transaction number will be editable for further changes.

Memberships

Transaction No Date Comments Comment Deleted Effective Date Comment Deleted Deleted Deleted Instructions: How to make a change of memberships Request for change of memberships Deleted Deleted Code Description Memberships in Type Select Memberships on lie Select Select Select Other memberships to be added: Select Select Select Other memberships to be addetata -Select Membership Type- • Select Other memberships in system -Select Membership Type- • Select Membership Type- • ALT-UNON ALT Unon -Select Membership Type- • Select Membership Type- • AMNARCHY American Payrol Association -Select Membership Type- • Select Membership Type- • CPA Canadian Payrol Association -Select Membership Type- • Select Membership Type- • Select Membership Type- • CPA Canadian Payrol Association -Select Membership Type- • Select Membership Type- •	🕻 🗈 🏠 Logol	lelete Cancel	e Submit	Save				If Service	Employee Se	xP
Effective Date Comment Commen	ev NEXT 🕨 Original 🔻					Comments	Date	No	Transaction	
Request for memberships Request for change of memberships Code Description Memberships on file Sete Memberships to be added: Sete Memberships to be added: Sete Other memberships in system Sete 2107-CPA 2107-CPA -Select Membership Type Sete ALT-UNION ALT Union -Select Membership Type Sete APA-01 American Institute of Archit. -Select Membership Type Sete APA-01 American Payrol Association -Select Membership Type Sete CPA Canadian Payrol Association -Select Membership Type Sete CPA Canadian Payrol Association -Select Membership Type Sete ASDFSADF fadsastasdfsadf -Select Membership Type Sete 21 BEW Local 21 -Select M	ed Changed Addec	Deleted						Comment	C '	Effective Date
Request for change of besorption Memory besorption Memory besorption Second								for memberships	a change request	How to make
Ocde Description Membership Kembership Type Sete Memberships on file Sete Se								emberships	r change of me	Request f
Memberships on line Sele Memberships to be added: Sele Memberships to be deleted: Sele Other memberships in system Sele 2107-CPA 2107-CPA Select Membership Type ▼ Sele ALT-UNION ALT Union Select Membership Type ▼ Sele AMNARCHNY American Institute of Archit. Select Membership Type ▼ Sele APA-01 American Payroll Association Select Membership Type ▼ Sele APECO Assoc. of Prof. Eng. Ontario Select Membership Type ▼ Sele CPA Canadian Payroll Association Select Membership Type ▼ Sele ASDFSADF Eddadafaadfaadf Select Membership Type ▼ Sele ASDFSADF Eddadafaadfaadf Select Membership Type ▼ Sele 1 BEV/ Local 21 Select Membership Type ▼ Sele Sele 0072014.C Org. Detail Select Membership Type ▼ Sele Sele Sele ShiftM Society of Human Recources Select Membership Type ▼ Sele Sele Sele Sele Sele Sele Sele				ership Type	Mem		Description		Code	
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Bit Indication of the detect. Serie Coher memberships in system Seciet 2107-CPA 2107-CPA Select Membership Type Image: Seciet Membership Type <td< td=""><td>Select</td><td>Se Se</td><td></td><td></td><td></td><td></td><td></td><td></td><td>s to be deleted:</td><td>Membershi</td></td<>	Select	Se Se							s to be deleted:	Membershi
2107-CPA 2107-CPA Select Membership Type Image: Constraint of Archit ALT-UNION ALT Union Select Membership Type Image: Constraint of Archit AMINARCHIVY American Institute of Archit. Select Membership Type Image: Constraint of Archit APA-01 American Payroll Association Select Membership Type Image: Constraint of Archit APEO Assoc. of Prof. Eng. Ontario Select Membership Type Image: Constraint of Archit CPA Canadian Payroll Association Select Membership Type Image: Constraint of Archit CPAS Canadian Payroll Association Select Membership Type Image: Constraint of Archit ASDFSADF Isdfasdfasdf Select Membership Type Image: Constraint of Archit 03072014. Org. Detail Select Membership Type Image: Constraint of Archit 03072014. Org. Detail Select Membership Type Image: Constraint of Archit SHRM Socky of Human Recources Select Membership Type Image: Constraint of Archit 03072014 Valdation against Memberships Select Membership Type Image: Constraint of Archit 03072014 Valdation against Memberships Select Membership Type Image: Constraint of Archit 03072014 Valdation against Memberships<	Select							1	erships in system	Other mem
ATUMINA ALT Union	Select				Select Membershin Type 🔻			2107-CPA	orompo in oyotom	2107-CPA
AlmiAnaChiniy American Institute of Archit.					Select Membership Type			ALT Union		ALT-UNION
APA-01 American Payroll Association Select Membership Type Image: Constraint of the Select Membe					Select Membership Type		it	American Institute of Arch		AMINARCHIN
AFCO Assoc of Prof. Eng. Ontario					Select Membership Type		tion	American Pavroll Associat		APA-01
CPA Canadian Payrol Association Select Membership Type Image: CPA of the constraint of the const					Select Membership Type		rio	Assoc. of Prof. Eng. Ontai		APEO
CPA05 Canadian Payroll Association Select Membership Type Image: CPA05 ASDFSADF fsdfasdfasdf Select Membership Type Image: CPA05 21 BEW Local 21 Select Membership Type Image: CPA05 08072014.C Org Detail Select Membership Type Image: CPA05 PENGASSO Professional Engineers Assoc Select Membership Type Image: CPA05 SHRM Society of Human Recources Select Membership Type Image: CPA05 1251234 Validation against Memberships Select Membership Type Image: CPA05 00072014 Validation against Memberships Select Membership Type Image: CPA05					Select Membership Type		ion	Canadian Payroll Associat		CPA
ASDFSADF fsdfasdfasdf Select Membership Type Image:					Select Membership Type		ion	Canadian Payroll Associat		CPA05
21 BEW Local 21 Select Membership Type Image: Comparison of the system of the syst					Select Membership Type			fsdfasdfasdf		ASDFSADF
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SHRM Society of Human Recources Select Membership Type Image: Constraint of the system of the sy					Select Membership Type		ISOC	Professional Engineers As		P.ENGASSO
TEST1234 Validation Select Membership Type Image: Comparison of the system, please specify here: 08072014 Validation against Memberships Select Membership Type Image: Comparison of the system, please specify here:					Select Membership Type 🔻		ces	Society of Human Recourd		SHRM
08072014 Validation against Memberships Select Membership Type If membership types are not in the system, please specify here:					Select Membership Type 🔻			Validation		TEST1234
If membership types are not in the system, please specify here:					Select Membership Type 🔻		ships	Validation against Member		09072014
					1 //-		cify here:	the system, please spe	p types are not in	If members

This screen is used to view and update an Employee's Membership information.

The Memberships on file section displays memberships that are currently set up in HR.

To create a request, enter the **Effective Date**. A comment is optional. To add a membership, find it, select its **Membership Type** and check its corresponding **Select** checkbox.

Memberships that are not in the system may be manually added by checking the **Other memberships in** system checkbox, then entering their details in the textbox with the caption, "**If membership types are not in** the system, please specify here". When done, press the [Save] button.

Employee Se	elf Service		Save S	ubmit Delete Cancel 📝 🖬 🏠 Logou					
Transaction No	Date	Comments		€ PREV NEXT 1 218-2017-02-06 ▼					
218	2017-02-06								
Effective Date 060216	Comment			Deleted Changed Added					
Instructions: How to make a change reques	t for memberships								
Code	Description		Membership Type						
Memberships on file				Select					
Memberships to be added:				Select					
SHRM	Society of Human Recources	Full Member	-						
Memberships to be deleted:				Select					
Other memberships in syster	n			Select					
2107-CPA	2107-CPA	Select Membership	Type 🔻						
ALT-UNION	ALT Union	Select Membership	Туре 🔻						
AMINARCHNY	American Institute of Archit.	Select Membership	Туре 🔻						
APA-01	American Payroll Association	Select Membership	Туре 🔻						
APEO	Assoc. of Prof. Eng. Ontario	Select Membership	Туре 🔻						
CPA	Canadian Payroll Association	Select Membership	Туре 🔻	E =					
CPA05	Canadian Payroll Association	Select Membership	Туре 🔻						
ASDFSADF	fsdfasdfasdf	Select Membership	Туре 🔻						
21	IBEW Local 21	Select Membership	Туре 🔻						
08072014.C	Org.Detail	Select Membership	Туре 🔻						
P.ENGASSO	Professional Engineers Assoc	Select Membership	Туре 🔻						
TEST1234	Validation	Select Membership	Туре 🔻						
09072014	Validation against Memberships	Select Membership	Туре 🔻						
If membership types are not i	n the system, please specify here:								
		Attachment							
				Upload					
File N	ame	Upload Date	Note	Action					
		No Records Found							

The Memberships to be added will be displayed in the **Memberships to be added** section. A new record with the transaction number and current date will be created, and the Original record will not be available for editing. The memberships to be deleted will be displayed in the **Memberships to be deleted** section.

To delete a saved request, press the [Delete] button.

To submit the request, press the [Submit] button.

If the **Membership Auto Approve** checkbox is checked in the Self Service Control Setup screen, the Memberships request will automatically be approved, and it will be displayed in the Auto Approved Request List screen with a Submit Status of "A". If the checkbox is not checked, the Memberships request will not be automatically approved, and will be displayed in the Personal Information Change Request Approval screen to be approved. It will also be displayed in the Auto Approved Request List screen with a Submit Status of "S".

Once approved, the Memberships added will be displayed in the **Memberships on file** section, and the Original record will be editable again. The Original record will be updated with the changes that were approved. The memberships will be updated in HR in the Personnel -> Memberships screen also.

If the Change Request was rejected, the record with the same transaction number will be editable for further changes.

Interim Evaluation

Employee self service								
Search Go	Perfor	mance Plan Period: Monthly Plan(2012-01-01~2013-01-01)	Review date: Select previou	us evaluation 💌				
Employee Self Service	Job Classification Architect		Employee Suzette Watson	Manager				
Profile Information HR Information W-4 Information Td1 Information	Performance Standards for Architect (2012-01-01 to 2013-01-01)	Agreed Performance Plan and Objectives for Suzette Watson (2012-01-01 to 2013-01-01)	Observations and Evaluations					
Emergency Contacts	Overall Evaluation for Learning and Growth			30 Weight				
Certification and Licenses	Individual Development Pursues individual growth and developmental opportunities, including internal and externa formal and informal training and strives to become more professionally competent. Created for testing purposes only.	Idevelopment and Created for testing purposes.						
SWC-WK-SAL3 SWC-WK-SAL3 SWC-WK-SAL3 Discipline History Discipline History Payment Administration One Enrolment	Team Leadership Actively leads, context, methors, and encourages learn and other internal staff memberry Willey shares knowledge and experience and provides frequent, positive, constructive, feedback. Follows the performance management process as set goals and expectations, performance, and provide appropriate developmental guidance. Created of relating purposes only.	Team LeadersHSIp Intervent and encourages team and other internal staff members in positive very Actively leads, coaches, mention, and encourages team and other internal staff members in positive very feedback. Follows the performance management process to set goals and expectations, revew performance, and provide sprovide developmental goalance.						
Request and Review Vacation Balan		Overall Evaluation for Learning and Growth						
Pay Stub Printing Direct Deposit Accounts Year End Summary	Not Acceptable ² Needs Improvement ⁴ Effective ⁶	Highly Effective ⁸ Outstanding ¹⁰						
Class Enrolment	Overall Evaluation for Demonstrated Professional Skills			50 Weight				
	Functional and Analytical Expertise Consistently utilizes skills, processes and analytical and problem solving methods that are function to produce high-quality results. Created for testing purposes only.	accepted by the profession and Created for testing purposes.						
- Review Applicants		Overall Evaluation for Demonstrated Professional	Skills					
Applicant Self Service	Not Acceptable ² Needs Improvement ⁴ Effective ⁶	Highly Effective ⁸ Outstanding ¹⁰						
Manager Self Service								

This screen is used by employees to review their Interim evaluations by their managers.

The system will default to the latest created review, and previous reviews are also available.

Interim Evaluations allow managers to enter observations/notes against each section of an employee's performance plan, and to rate the performance in each category. For managers, Interim Evaluations are created in the HCM module, using the Interim Evaluations screen (standard Treeview path: *HCM > Performance Management > Interim Evaluations*). For details, please refer to the HCM user guide.

There is an option to open [View Notable Incidents] for employees review. For details, please refer to the HCM user guide.

Annual Evaluation

Employee Self Service					
Go	Job Classification Architect		E	mployee Suzette Watson	Manager
nployee Self Service				View previous plan: Yearly Plan(2012-01	-01~2013-01-01)
Personal Information					
Profile Information HR Information W-4 Information	Performance Standards for Architect	Agreed Performance Plan and O Suzette Watson (2012-01-01 to 2013-01-	of)	Observations and Evaluations	
Td1 Information					
Emergency Contacts	Learning and Growth				30 W
Certification and Licenses Degrees Memberships	Individual Development Pursues individual growth and developmental opportunities, including internal and exter formal and informal training and strives to become more professionally competent. Creat only.	nal development and ted for testing purposes.			
Annual Evaluation Annual Evalution SWIC-WK-SAL3 Discipline History Payment Administration	Team Leadership Actively leads, coaches, mentors, and encourages team and other internal staff memb Willingly shares in knowledge and experience and provides frequent, positive, constructi feedback. Follows the performance management process to set goals and expectation and provide approvide developmental guidance. Created for testing purposes only.	Put in place some on-going tear e, and accurate encourage discourse between s, review performance,	n building social activities that w shifts and departments.	il .	
Open Enrollment		Overall Evaluation for Learnin	g and Growth		
Pay Stub Printing Direct Deposit Accounts	Not Acceptable ² Needs Improvement ⁴ Effective ⁶	Highly Effective ⁸ Outstanding ¹⁰			
Year End Summary Corporate Learning	Demonstrated Professional Skills				50 W
Class Enrollment	Functional and Application				
Training Nomination Training Request	Consistently utilizes skills, processes and analytical and problem solving methods that a function to produce high-quality results. Created for testing purposes only.	are accepted by the profession and Created for te	sting purposes.		
Enter Requisition		Overall Evaluation for Demonstrated	Professional Skills		
Review Requisition Activity					
Review Applicants Applicant Self Service	Not Acceptable ² Needs Improvement ⁴ Effective	Highly Effective ⁸ Outstanding ¹⁰			
Corporate Information Forms Request Security	Performance Ratings in previous reviews for: Suzette Watso	n			

This screen is used by employees to review their Annual Evaluations, and to review Notable Incidents.

This screen defaults to the latest created review, and previous ones can also be viewed through this screen.

Annual evaluations have been designed to be pre-populated with all the items from the interim evaluations that were flagged to be carried forward to the Final Evaluation. Annual Evaluations allow the manager to enter additional observations/notes against each section of the employee's performance plan, and to rate the performance in each category, between 'Outstanding' and 'Unacceptable'. Additionally, revision to the values carried forward from the Interim Evaluations may also be made.

For further details about Annual Evaluations, please refer to the HCM user guide.

Discipline History

P	CMC Employee Self Service											
\$ D D	Employee Self Service	e ^					Discipline History					
Search		Col	Transaction No	Performed Date	Туре		Action	Handled By	Effective Date		Status	
			12	08/Dec/2010	Writen	Written		SUS-EMP-2	08/Dec/2010	Submitted		
🖃 🗁 🗄	mployee Self Service		13	08/Dec/2010	Verbal	Sent Home Without Pay		SM-EMP01	07/Dec/2010	Submitted		
	Personal Information		7		Verbal	Written			10/Nov/2010	Submitted		
	Profile Information		8	19/Nov/2010	Writen	Sent Home Without Pay			19/Nov/2010	Submitted		
	He information		14	04/Dec/2010	Verbal	Sent Home Without Pay		SM-EMP01	03/Dec/2010	Employee Signed		
	Td1 Information											
	Emergency Contacts						Discipling Dotaile					
	Skills						Discipline Details					
	Certification and Licenses										Save	
	- Degrees		Discipline 1	Type Writen								
	Memberships											
	Interim Evaluation		Action T	aken S								
	Discipline History		Effective 0	Date 191110				Close Date	U			
	Payment Administration			What I consider to be insubordination							*	
	Recruiting											
L H	Corporate Information		Problem Descri	ption								
ŭ₫	Security										-	
- ±0	Manager Self Service											
			Handle	d By								
			Performed	Date 191110								
				Sent home no pay for the next 3 ye	ars, then we'll see what I	happens					×	
			Resol	ution								
											-	
											*	
			Employee Com									
			Employee com	inen.								
											v	
			E									
			L By signing this noti	ce, I am acknowledging that I have been co	unseled about my inappro	priate conduct and informed of o	onsequences if improvements are no	t made.				
			Sign									

This screen is used by employees to view current and past Disciplinary notices. The Discipline History is the JSP version of Discipline Tracking in HR Forms.

Managers create Disciplinary records via the Employee Discipline History screen of the HCM module (standard Treeview path: *HCM > Performance Management > Employee Discipline History*). These records are created in draft form, which are not available to anyone. Once the manager submits the record, the employee will be able to see it in the Discipline History screen of the Employee Self Service system. The manager can also send a predefined email to the employee that will inform him/her of the Disciplinary Action, and it will contain the URL to the ESS system.

C	🚽 ") U 🔺 🕇	* =				Disciplinary Action Notice - Message (Plain Text)
	Message					
Reply	Reply Forward	Delete Move to Create Other Folder * Rule Actions *	Block Not Junk	Categorize Follow Mark as	H Find → Related ▼ → Select ▼	
	Respond	Actions	Junk E-mail 🛛 🖗	Options 👒	Find	
From: To: Cc:	stephanie.bro Stephanie Bro	omfield@cmic.ca omfield				
Subject:	Disciplinary	Action Notice				
A di	sciplinary a	ction has been taken, fo	r detail informat	ion please click the	following	link to log on to employee self service.

The employee will be able to open the item in ESS, and add their own comments, as well as add their electronic signature to indicate that they have seen the document.

Payment Administration

Open Enrollment

Open Enrollment allows employees to make benefit/deduction elections from the benefit package offered by their company. The plans and options that they are eligible for and elected in are displayed for the employee to make their selections. During a fixed period range, Open Enrollment allows the employee to elect the benefit/deduction plans and options in which they would like to participate. Once submitted, the requests are made available in the Open Enrollment Approval screen for approval and the Payroll/HR modules are updated accordingly. Qualifying Events and Dependent requests also require approval.

Welcome to CMIC Open Enrollment

Open Enrollment is 08/01/2010 through 12/31/2010.

During this period, you have the opportunity to make your 2011 benefit elections.

Ed Knight Enrollment	Ed Knight Enrollment											
Status	Start Date	End Date	Days Left	D	Action							
Pending	2010-08-01	2010-12-31	57	General		Enroll Now						
Enrollment Links												
Add Dependent												
Qualifying Event												
Report/Review Qualify	ving Event											
Dependent Enrollment												
Current Cost	urrent Cost											
Employee Amount	\$40.38	Employ	ver Amount	\$80.76	Total Cost	40.38						

The employee can enroll in different benefit plans/options, or make changes to existing plans/options after clicking on the **Enroll Now** link to enroll. The link is displayed only one period at a time. The Period Start and End Date for "General" periods (not Qualifying Events) are determined by the period dates set up in the Open Enrollment Period Setup screen.

Enrolling

					Notes	Current Compa	rison Submit Changes
Benefits Enrollment					110105		Cubring Changes
Enrollment Status	Benefit Description	Current Plan	Option	Effective Date	Employee Amount	Employer Amount	Total Amount
Elected Last Year	401K	Employer Match	SNGLE	01/01/2008	46.15	46.15	92.3 Change
Elected Last Year	Living Expenses	Single	T-FREE	12/31/2008	0	76.92	76.92 Change
Not Enrolled	401K	No Coverage		01/01/2008			Change
Not Enrolled	Dental	No Coverage		04/01/2008			Change
Not Enrolled	Garnishment	No Coverage		01/08/2008			Change
Not Enrolled	Living Expenses	No Coverage		12/31/2008			Change
Not Enrolled	Vehicle Allowance	No Coverage		01/01/2008			Change

The **Allow Open Enrollment** checkbox in the Master Benefit/Deduction screen in HR determines which benefits/deductions are visible in Open Enrollment.

Eligible and elected benefits/deductions are listed here. The Employee Amount is the actual amount the employee pays on deductions. The Employer Amount is the amount the employer pays, i.e. the employer contribution of a deduction, a cash or non-cash benefit.

To change the election press the [Change] button beside the benefit/deduction and select the new coverage.

Benefit Plan Op	Benefit Plan Options For: Living Exp							
Plan Description	Plan Option	Employee Amount	Employer Amount	Total Amount	Selec			
Single	T-FREE	0	76.92	76.92	0			
Family	T-FREE	0	92.31	92.31	\odot			
No Coverage		0	0	0	0			
				Save Ca	ncel			

The plans/options for the particular benefit are displayed in a pop-up screen for selection. When done, press the **[Save]** button.

Notes may be added to the Benefit Enrollment record.

<i> (</i> Eligible E	Benefit - Win	dows Internet Explorer				×
			Add	Save	Close	2
Date	Author	Note				
2010-09-10	Hazel Patton	Changes to benefit elections			E	dit

To enter or view notes, press the [Notes] button. To add a note, press the [Add] button, and enter the note. When done, press [Save]. To edit the note, click on the Edit link.

To compare the current enrollment with the new request press the [Current Comparison] button.

Scomparision 🖉	n - Windows Int	ernet Ex	plorer										_ 🗆 🗙
												Submit	Close
Coverage Con	nparision										-		
Current Enrollment									Reque	sted Changes	5		
Benefit Description	Enrolled Plan	Option	Effective Date	Employee Amount	Employer Amount	Total Amount	Benefit Description	Enrolled Plan	Option	Effective Date	Employee Amount	Employer Amount	Total Amount
Living Expenses	Single	T-FREE	12/31/2008	0	76.92	76.92	Living Expenses	Family	T-FREE	12/31/2008	0	92.31	92.31

The current enrollment and the requested changes are displayed for the employee to review.

To submit the changes press the [**Submit**] button. To submit the changes without reviewing the comparison, press the [**Submit Changes**] button.

Confirmation \$	Statement Open En	rollment					-				
Event Date:08/01/2010 Enrollmen	t Deadline: 09/14/2010 Days Left: 44					C	on firmation Number: 4843				
This screen confirms the coverag	e you will receive as a result of this event. If you	do not change your elections, this coverage	will remain in effect. You may refer	to the Confirmation Number for future inquiries, i	necessary.	Continued on: C	19/10/2010 00:09 AM EDT				
fease print and relain this information for your records.											
Reminder:If you haven't yet mad period, unless you experience and (If you need to make any correction	iminder:if you haven't yet made new benefit elections as a result of this event (or if you want to change the elections you just make), you have until the enrolment deadline to do so. After the enrolment deadline, you will not be able to make changes until the next Open Enrolment rod, unless you experience another Qualified Life Event.										
Coverage Overview											
Enroliment Status	Benefit Description	Enrolled Plan	Option	Effective Date	Amount	Employee Amount	Total Amount				
Changed	Living Expenses	Family	T-FREE	12/31/2008		0 92.31	92.31				
				Total	1	0 92.31	92.31				
I have read the above statem	ent										
Sign											

A confirmation is displayed with a [**Sign**] button for signing the confirmation. Once submitted, the Status of the benefit enrollment line in the Welcome to Open Enrollment screen is changed from Pending to Submitted. The **Enroll Now** link is changed to **Review Changes**, and the employee may click on this link to review the changes made. The request will be available to the approver to approve in the Open Enrollment Approval screen.

If the request is rejected, the link for the Action in the Welcome to Open Enrollment screen gets updated to "**Make More Changes**", and the employee can click on this link to make further changes and re-submit for approval.

Add Dependent

Effective Date 0	2/15/2011	C	omment	
First Name	Jacqueline	Last Name [®]	Patton	Middle Name
Date Of Birth	04/24/1995	SSN (no space/hyphen)	780124570	
Relation	Child 💌	Priority	Highest 💌	
Phone	(312) 405-1029	Alter Phone		Cell Phone (312) 394-2039
Pager		Fax		E-Mail Address
Address Line 1	40 Plum Road			
Address Line 2	Chicago			
Address Line 3	Illinois			
ZIP	60609			
County		City		
State	Illinois 🔺	Country	United States of America -	Delete this record
First Name	Mike	Last Name	Patton	Middle Name
First Name Date Of Birth	Mike 12/14/1960	Last Name [*] SSN (no space/hyphen) [*]	Patton 561248790	Middle Name
First Name [®] Date Of Birth [®] Relation [®]	Mike 12/14/1960	Last Name [*] SSN (no space/hyphen) [*] Priority	Patton 561248790 Highest 💌	Middle Name
First Name Date Of Birth Relation Phone	Mike 12/14/1960 Spouse (312) 405-1029	Last Name [¶] SSN (no space/hyphen) [¶] Priority Alter Phone	Patton 561248790 Highest 💌	Middle Name Cell Phone (312) 309-0909
First Name Date Of Birth Relation Phone Pager	Mike 12/14/1960 Spouse (312) 405-1029	Last Name SSN (no space/hyphen) Priority Alter Phone Fax	Patton 561248790 Highest	Middle Name Cell Phone (312) 309-0909 E-Mail Address
First Name Date Of Birth Relation Phone Pager Address Line 1	Mike 12/14/1960 Spouse (312) 405-1029 40 Plum Road	Last Name [®] SSN (no space/hyphen) [®] Priority Alter Phone Fax	Patton 561248790 Highest V	Middle Name Cell Phone (312) 309-0909 E-Mail Address
First Name Date Of Birth Relation Phone Pager Address Line 1 Address Line 2	Mike 12/14/1960 Spouse (312) 405-1029 40 Plum Road Chicago	Last Name [®] SSN (no space/hyphen) [®] Priority Alter Phone Fax	Patton 561248790 Highest 🔽	Middle Name Cell Phone (312) 309-0909 E-Mail Address
First Name Date Of Birth Relation Phone Pager Address Line 1 Address Line 2 Address Line 3	Mike 12/14/1960 Spouse (312) 405-1029 40 Plum Road Chicago Illinois	Last Name [®] SSN (no space/hyphen) [®] Priority Alter Phone Fax	Patton 561248790 Highest V	Middle Name Cell Phone (312) 309-0909 E-Mail Address
First Name Date Of Birth Relation Phone Pager Address Line 1 Address Line 2 Address Line 3 ZIP	Mike 12/14/1960 Spouse (312) 405-1029 (312) 405-1029 40 Plum Road Chicago Illinois 60609	Last Name [®] SSN (no space/hyphen) [®] Priority Alter Phone Fax	Patton 561248790 Highest 💌	Middle Name Cell Phone (312) 309-0909 E-Mail Address
First Name Date Of Birth Relation Phone Pager Address Line 1 Address Line 2 Address Line 3 ZIP County	Mike 12/14/1960 Spouse (312) 405-1029 (312) 405-1029 (40 Plum Road Chicago Illinois 60609	Last Name SSN (no space/hyphen) Priority Alter Phone Fax City	Patton 561248790 Highest 🔽	Middle Name Cell Phone (312) 309-0909 E-Mail Address
First Name Date Of Birth Relation Phone Pager Address Line 1 Address Line 2 Address Line 3 ZIP County State	Mike 12/14/1960 Spouse (312) 405-1029 40 Plum Road Chicago Illinois 60609 Illinois	Last Name [®] SSN (no space/hyphen) [®] Priority Alter Phone Fax City Country	Patton 561248790 Highest V	Middle Name Cell Phone (312) 309-0909 E-Mail Address Delete this record

Dependents may be added/removed from the employee by pressing the Add Dependent link.

To make a dependent request, enter an Effective Date. A comment is optional.

To add dependents, press the blue Add icon + at the bottom-right of the current record, and enter the details for the Dependents. The First Name, Last Name, Date of Birth, SSN and Relation are required fields. Enter the details and save. To drop a dependent, check the **Delete this record** checkbox and hit [**Save**].

To submit the changes, press the [**Submit**] button. The status will be changed to Submitted, and the request will be available in the Dependent Approval screen for the approver to approve.

Once approved, the status in Add Dependent will be changed to Approved. Once approved, the Current record is available for editing again.

Report/Review Qualifying Event

Employee Se	If Service			🔓 🗈 🍙 Logout
Select EventSelected Pas	t Qualifying Event 💌			Save Submit Cancel Back
	Qualifying Event			
Event T	Child Birth 💌	Event Date	2 C	
Profile Change Confirmation Number	Select Profile Change Confirmation Number			
Add Dependent				

A Qualifying Event is a change in status such as marriage, birth of a child, etc. that requires reporting, and changes to the benefit/deduction election. The period range for the qualifying event is determined by the number of days specified in Qualified Event Days in the Open Enrollment Control Setup screen.

Select the Event from the drop-down list and enter an **Effective Date** (Events are setup in the Qualify Event Setup screen). Select the Profile Change Confirmation Number and/or Dependent Change Confirmation Number if required.

To enter a note, press the [Notes] button. To add the note, press the [Add] button. When done, press the [Save] button.

To add an attachment, press the [Attachments] button.

To save the Qualifying Event, press the [**Save**] button. To submit the changes, press the [**Submit**] button, and the request will be displayed in the Qualifying Event Approval screen for approval. Once approved, the qualifying event will be displayed in the Open Enrollment screen, if the period range is current.

Dependent Enrollment

ependent En	rollment				I
Expand All	First Name		Last Name	Relation	Date of Birth
	Mason		Richard	Child	2000-06-05
Description	n	Plan	Effective Date		
Dental		BCBS	2008-06-20	Change Coverage	
]	Mason		Myrna	Child	2002-06-02
Description	n	Plan	Effective Date		
Dental		BCBS	2008-06-20	Change Coverage	

Dependents can be enrolled in benefits/deductions by checking the dependent to be enrolled, and pressing the [**Submit**] button for approval. The blue Add icon + beside the benefit/deduction allows the user to see the details.

Notes may be entered by using the [Notes] button.

Request and Review Vacation Balances

Y	Employee Self Se	rvice														View/	Create Vacation Rec	quest
\$ E E	Employee Self Service	*						View V	/acatio	on Balance								
Search	Go		Company	Sheppard Constructions I	nc			Employ	yee Ja	ane Austin					\rightarrow		NEXT () 2013	•
Em Em	ployee Self Service	Code		Description	Eligible Days		Carried Forward Days	Accrued Days		Used Days		Remaining Days	CF Expi	re Date	CF Lost Days		Action	_
- ē 🔁	Personal Information	PERS	Personal Day	s		10	0		0		0	0				0		_
1	Profile Information	PTO	Paid Time Off			15	0		0		0	0				0		
	HR Information	SICK	Sick Leave			7	0		0		0	0				0		
-	W-4 Information	UPLV	Unpaid Leave				0		0		0	0				0		
-	Td1 Information	VAC	Vacation			10	0		0		0	0				0	Create Request	
-	Emergency Contacts																	-
	3 Skills																	
-	Certification and Licenses																	
-	Degrees																	
	Memberships																	
	Interim Evaluation																	
	Discipline Mistory																	
	Discipline matory																	
	Open Enrolment																	
	Request and Review Vacation Balan																	
	Pay Stub Printing																	
	Direct Deposit Accounts																	
	Year End Summary																	
- E 🍋	Corporate Learning																	
	Class Enrollment																	
-	Training Nomination																	
	Training Request																	
ė 🍋	Recruiting																	
1 1 1 1	Enter Requisition																	
	Review Requisition Activity																	
-(Review Applicants																	
	Applicant Self Service																	
📄 🗁	Corporate Information																	
	Forms Request																	
i 🖲 🦲	Security																	
📔 🕒	Manager Self Service																	

This screen is used by employees to view their vacation balances, and to request vacations/unpaid leaves, and paid time off. There are options to view vacation uses and balances for current and previous years.

When users click the [**Drop Down Menu**] in the year field, or [**Prev/Next**] arrow that are located next to the year field, he can chooses to see vacation balances for this specific year.

In order to request Vacation, employees click [View/Create Vacation Request] in the right top corner of the screen. New screen opens.

1	Employee Self Servio	ce								Create Request Back
\$ E E	Employee Self Service	Seq. No.	Start Date	End Date	Working Days	Code	Description	Note	Status	Delete
Search	Go					No Records Found				
	loyee self service									
	Profile Information									
	HR Information									
	W-4 Information									
	Td1 Information									
-	Emergency Contacts									
	Skills									
	Certification and Licenses									
	Degrees									
	Memberships									
	Interim Evaluation									
	Annual Evalution									
	Discipline History									
	ayment Administration									
	Open Enrolment									
	Pay Stub Printing									
	Direct Denosit Accounts									
	Year End Summary									
660	orporate Learning									
	Class Enrollment									
-	Training Nomination									
	Training Request									
🗄 🗁 P	ecruiting									
-0	Enter Requisition									
	Review Requisition Activity									
	Review Applicants									
1 1-1	Applicant Self Service									
	orporate information									
	Forms Request									
	ecurity Innener Self Service									
m 🗍 .	unuger den der nee									

Then Click [Create Request].

vice								Save Submit Cancel
Start Date			End Date	•			Working Days	A
Leave Code		•						
Note								A T
Seq. No.	Start Date	End Date	Working Days	Code	Description	Note	Status	Delete
			No F	Records Found				

First, user enters [**Start Date**] and [**End Date**] for vacation. Second, user clicks on [**Leave Code**] drop down menu and chooses the appropriate Leave code. It is optional whether to enter the note or not.

Then click [Submit].

vice			Ē	arnaz Haraji's Profile Home Logo
				Save Submit Cano
Start Date 020413	End Date 020513		Working Days	2
Leave Code		`		
Employee Leave Cod	e List - Windows Internet Expl 🗖 🔍 🐹			*
http://qa4v10.cmic.	a:7785/cmicptfv10x/PyLov/showPyempleaveLc 🗟			Ŧ
Seq. No. Start Date Find: %	Go Close	Description	Note Status	Delete
< <pre><<pre></pre></pre>	et 1-1 of 1 - Next Set >>			
Code	Description			
VAC	Vacation			
	Ŧ	J		

The next screen that opens shows user Sequence Number of vacation request, with all details and the status of the request. This request will be sent to the HR department for approve.

 Seq. No.
 Start Date
 End Date
 Working Days
 Code
 Description
 Note
 Status
 Delete

 7
 02/04/2013
 02/05/2013
 2 VAC
 Vacation Please approve my vacation.
 Submitted

 After a Vacation Request is approved, its status is set to "Approved".

 /ice

Seq. No.	Start Date	End Date	Working Days	Code	Description	Note	Status	Delete	*
7	02/04/2013	02/05/2013	2	VAC	Vacation	Please approve my vacation.	Approved		

Pay Stub Printing

	Date			Comments					C PREV NEXT > 201	0-09-27~2010-10-03
	2010-09-27 ~ 2010-10-0	13		Total Net Pay : \$81	18.27					
			Pay Stub De	tails for Employee	e: Patton,Hazel Year	: 2010 Period: 40 Com	pany: SSConstruction	Company		
Company	SSConstruct	ion Company								
mployee	Patton,Hazel	l				Pay Period: Sep-	-27-2010 To Oct-(03-2010		
Employee Nun	ber SS-WK-SAL	.40								
Description	Tran Type	Hours	Pay Amount	Adjustment	Net Pay	Description	Tran Type	Deduction Amount	Adjustment	Net Deduction
lormal Hours	BW	40	\$1,538.46	s	0 \$1,538.46	401K	DE	-\$261.54	\$0	-\$261
						City Tax	TX	-\$41.48	\$0	-\$41
						SD EE	TX	-\$0.6	\$0	-S
						Fed / FIT	TX	-\$228.24	\$0	-\$228
						Med FICA EE	TX	-\$22.3	S0	-\$2
						SS FICA EE	TX	-\$95.38	\$0	-\$95.
						State Tax	TX	-\$70.65	\$0	-\$70
	Gross Pay Amou	unt (Gross Pay Amount Adju	stment	Gross Net Pay	Gross Deduction Ar	nount	Gross Deduction Adjustment Am	ount G	ross Net Deduction
Gross Hours										

This screen is used by employees to view or print their Pay Stubs. The employee may select a Pay Stub from the drop-down list at the top of the screen. To print it, the **[Print]** button is used.

Direct Deposit Accounts

XP Employ	ee Self Service						Save Submit Cancel	🛛 🖓 🗈 🍙 Logout
			Direct	Deposits and Checks A	Accounts			
Priority	Percentage	Split Type	Bank Code	Name	Branch Code	Name	Transaction Code	Account Number
				No Records Found				
Tran	saction No	Date	Comme	ents			I PRE	EV NEXT 🕑 Current 🔻
Instructions:								
How to make a change	request for direct depos	sit						
Effective Date	20			Comment				
+								

This screen is used by employees to enter or update their direct deposit account details.

To make changes, first enter the [Effective Date], then click the blue Add icon 🕂.

	ree Self Service						Save Submit Cancel	🔓 🗈 🏠 Logout
			Direct Dep	osits and Checks	Accounts			
Priority	Percentage	Split Type	Bank Code	Name	Branch Code	Name	Transaction Code	Account Number
				No Records Found				
Tra	nsaction No	Date	Comments				(PRE	V NEXT 🕑 Current 🔻
Instructions:								
How to make a change	request for direct depo	sit						
Effective Date 0	20217 🔯			Comment				
+×	Type Direct Deposit	Percentage 60	Bank Code AMEGY AMEGY BAN	K 🔺	Branch Code MAIN AMEGY-Main		Bank Account Number 8786	3687675
+×	Type Direct Deposit	Percentage 40	Bank Code BOH Bank of Hav	aii 🔺	Branch Code MAIN Bank of Haw	aii - Main 🔺	Bank Account Number 4545	5618834
+								

Then, fill out the mandatory fields: Type, Percentage, Bank Code, Branch Code and Bank Account Number.

Once finished, click [Submit] to submit the changes for approval.

By clicking the blue Add icon +, user can enter more direct deposit accounts, but the total of their **Percentage** fields must equal 100.

NOTE: If one or more direct deposit accounts are on file, with their **Percentage** fields equaling 100, adding an account will overwrite the old account details with the new account details.

Year End Summary

(Contraction of the second	Employee Self S	ervio	e																			A	Amanda Matthe	ws's Profi	le <u>Home Log</u> s
\$ E Đ	Employee Self Service	A Ye	ar Column Name	Amount	Column Name	Amoun	t Column Name	Amount	Column Name	Amoun	t Column Name	Amount	t Column Name	Amount	Column Name	Amount	Column Name	Amount	Column Nam	e Amount	Column Name	Amount	Column Name	Amount	Column Name
Search	60	200	08 Basic Wages	119805.8		0		0		0		0		0		0		0		0		0		0	
		201	10	0		0	Deduction	-40		0	Dental	1200		0		0		0		0		0		0	
🖃 🗁 Emp	loyee Self Service																								
1 P	ersonal Information																								
	syment Administration																								
	Pequest and Review Vacation Balan																								
	Pay Stub Printing	<u> </u>																							
	W-2 /T4's Reissue Request																								
	Direct Deposit Accounts																								
	Year End Summary																								
🔅 🗀 C	prporate Learning																								
🕀 🦲 R	ecruiting																								
🗉 🕒 C	orporate Information																								
🗉 🖸 S	ecurity																								
_ ⊞⊜™	anager seit service																								
1																									

This screen shows a list of the information defined under the 'Self Service Year End Summary' definition of W2 Mapping (Forms version), for all years that the employee has worked, except for the current payroll year.

Corporate Learning

Class Enrollment

XP Class E	nrollment					A	dd New 🛛 🕻 🗈	✿ Logout
			Assigned Classes					
Class Code	Class Name	Course Name	Module Name	Start Date	Completion Date	Status		Action
SAFETYCLAS	Basic Safety	Company Safety Training	Safety 10002	09/14/2013		Applied	Mike Fern	x

This screen allows employees to enroll themselves in different classes.

Use the [Add New] button to select a class from a list of classes not yet taken.

This displays a multi select list of values, when the required classes have been selected use the **[Update]** button to enroll into the selected classes.

Training Nomination

^{рур} см	Training Nominati	ons						Suzette Watso	<u>'s Profile Home Logo</u>
\$ E E	Employee Self Service	·			Classes				Show Employees
Search	Go	Class Code	Class Name	Course Name	Module Name	Start Date	Completion Date	Location	
		123456	Basic Computer Skills			10/Aug/2011		Classroom 101	
🖃 🗁 Em	ployee Self Service	ZZ-SAFETY	Basic Safety	Company Safety Training	Basic Safety	17/Aug/2011	18/Aug/2011	Training 1	
8 🤭	Personal Information	CPR_FEB	CPR 01 module introduction	CPR for employees	CPR 01-100	04/Feb/2013	05/Feb/2013		
-	Profile Information	CLASS1	Introduction to PM	Project Manager Training	Introduction to PM	24/Aug/2011	07/Jun/2011	Head Office - Training Room 100	
	HR Information	1234	Introduction to PM	Project Manager Training	Introduction to PM	03/Dec/2012	07/Dec/2012	Head Office - Training Room 100	
	W-4 Information	MS - CL1	MS Office	MS Office	MS Office	31/Aug/2011	22/Jun/2011		
	1 Td1 Information	DEC2012	MS Office	MS Office	MS Office	11/Dec/2012	11/Dec/2012	Cmic	
	Emergency Contacts	MS005	MS Office	MS Office	MS Office	24/Jan/2013	25/Jan/2013		
	Skills								
	Certification and Licenses								
	Degrees								
	Interim Evolution								
	A A A A A A A A A A A A A A A A A A A								
	Discipline Mistory								
	Discipline matory								
	Open Enrolment								
	Request and Review Vacation Balan								
	Pay Stub Printing				Employee Details				New
	W-2 /T4's Reissue Request		Code			Name			Delete
	Direct Deposit Accounts	LG1-WK-SAL4		Anna Bronson					×
	Year End Summary	LG-TEST-001		001 Test					x
60	Corporate Learning	LG-TEST-001		001 Test					x
TH	Class Enrollment	CONCONCOL		0011680					
-	Training Nomination								
-	Training Request								
L.	Review Training History								
😑 🔁 🛛	Recruiting								
	Enter Requisition								
-	Review Requisition Activity								
	Review Applicants								
-	Internal Job Posting								
	Applicant Self Service								
8 🤭	Corporate Information								
	Forms Request	-							
	Company Events								
(F)	Security								

This program allows user of the ESS module to nominate employees to different classes within Courses and Modules.

(I) When user clicks [**Show Classes**] in the right-top corner of the screen the list of classes is displayed. By clicking on the class code, user can see the list of employees that were nominated for this class.

On this screen, users can nominate new employees for a class by clicking [New], or delete the employee from the class by clicking on [X] in the Employee Details section.

(II) When user clicks [**Show Employees**] in the right-top corner of the screen, the list of employees is displayed. When users click on an Employee Code, the details of the class nominated for the employee can be seen in the lower section of the screen.

русм	^C Training Nominati	ions							<u>Suzette Watson's Pr</u>	<u>ofile Home Loqou</u>
小田田	Employee Self Service					Employees				Show Classes
			Code				Employee Name			
Search	GO	PYMJ-WK-001		001 1	fourly PYWK					
🖃 🦳 Em	ployee Self Service	PYMN-001		001 :	SALARY PYMN					
- ē 🔁 🛛	Personal Information	LG-TEST-001		001	fest					
	Profile Information	CCC-WK-HR3		Abra	ham John					
-	HR Information	QA-WK-HR1		Abra	ham Jonathan					
	W-4 Information	QAT-WK-MOSS		Adrie	in Moss					
	1 Td1 Information	SWC-WK-HR4		Agne	s Richardson					
	Emergency Contacts	SWC-BW-SAL6		AliPe	terson					
-	Skils	LG1-WK-SAL4		Anna	Bronson					
	Certification and Licenses	SWC-BW-SAL11		Anth	ony Mark					
	Memberships	1044217		Anto	nio Banderas					
	Interim Evaluation	1044217		Anto	nio Banderas					
	Annual Evalution	123123		Aplic	ant Aplicant					
	Discipline History	SWC-WK-HR18		Arth	ır Blair					
ė 🍋 Ī	Payment Administration	SWC-WK-HR5 - ASH		Ashi	ey Simeon					
TI	Open Enrollment :	JD00-SAL-TEST		Barn	ey Stinson					
	Request and Review Vacation Balan	ALT-WK-BRIGGS		Barn	r Briggs					
	Pay Stub Printing					Class Details				New 1
	W-2 /T4's Reissue Request	Class Code	Class Name	Course Name	Module Name	Nomination Date	Start Date	Completion Date	Location	Delete
	Direct Deposit Accounts	DEC2012	MS Office	MS Office	MS Office	10/Dec/2012	11/Dec/2012	11/Dec/2012	Cmic	×
1	Year End Summary									
E 🔁	Corporate Learning									
-	Class Enrollment									
1	Training Nomination									
	Paulau Training Request									
	Review Hairing History									
	> Enter Requisition									
	Review Requisition Activity									
	Review Applicants									
	Internal Job Posting									
	Applicant Self Service									
- ė 🔁	Corporate Information									
Te	Forms Request	3								
-	Company Events									
 (a) (b) (c) (c)	Security III >									

On this screen, users can nominate new employees for a class by clicking [New], or delete employee from the class by clicking on [X] in the Employee Details section.

					Employees						Show Classes
	Code					Emplo	oyee Name				
PYMJ-WK-001			001 Hourly PY	WK							
PYMN-001			001 SALARY	PYMN							
LG-TEST-001			001 Test								
CCC-WK-HR3			Abraham John								
QA-WK-HR1			Abraham Jona	than							
QAT-WK-MOSS			Adrian Moss								
SWC-WK-HR4			Agnes Richard	ison							
SWC-BW-SAL6			Ali Peterson								
LG1-WK-SAL4	🦉 Select 🕻	ourses - Windows Int	ernet Explorer				- 0	x			
SWC-BW-SAL11											
1044217	🛛 🧭 http://	test4v10. cmic.ca :7785/	cmictestv10x/Hr	TrainNomination/showInttrain	ingLov.do?lovType	=Courses&wcParam1	=SWC-WK-HR4	2			
1044217											
123123							Save Cano	el î			
SWC-WK-HR18	Code	Course	Module	Class	Start Date	Completion Date	Location Sel	lect			
SWC-WK-HR5 - ASH	123456			Basic Computer Skills	10/Aug/2011		Classroom 101				
JD00-SAL-TEST											
ALT-WK-BRIGGS	CPR_FEB	CPR for employees	CPR 01-100	CPR 01 module introduction	04/Feb/2013	05/Feb/2013					
	-							_			New
Class Code									letion Date	Location	Delete
								-			
									1		

List of available classes is displayed in the popup. Use the Select checkbox to select a class, then click [Save].

Training Request

								Save Submit Delete Ca
Employee Self Service	т	ransaction No	Date	Comments				• PREV NEXT > Original
Go								
Employee Self Service	Effective Date	Comment					Delete	d Changed Adde
Profile Information	Instructions							
- HR Information	How to make a channe	request for training classes						
	How to make a change	line frequestion daming classes						
Fmergency Contacts	Request for enro	biing training classes				1		
Skils	Code	Descri	ption	Start Date	Complete Date	Apply Date	Status	
- Certification and Licenses	Enrolled/Completed tr	aining classes:						Select
Degrees	Classes applied:							Select
Interim Evaluation	Classes to withdraw:							Select
Annual Evalution	Other trainings class	es available:						Select
Discipline History	DEC2012	MS Office		2012-12-11 09:00:00.0	2012-12-11			
Payment Administration	HEODE	ME Office		2012 01 24 01:00:00 0	2012 01 25			-
Request and Review Vacation Balan	10000	10.075			2010-01-20			
Pay Stub Printing	MS - CL1	MS UTTICE		2011-08-31 09:00:00.0	2011-06-22			
- W-2 /T4's Reissue Request	1234	Introduction to PM		2012-12-03 08:00:00.0	2012-12-07			
Direct Deposit Accounts	CLASS1	Introduction to PM		2011-08-24 09:00:00.0	2011-06-07			
Corporate Learning	ZZ-SAFETY	Basic Safety		2011-08-17 09:00:00.0				
Class Enrollment	CPR_FEB	CPR 01 module introduction		2013-02-04 08:00:00.0	2013-02-05			
- Training Nomination	123456	Basic Computer Skills		2011-08-10 09:00:00 0			-	
Training Request	lif American and a second second	and available alares ana if bases						
Recruiting	In training classes are i	not available, please specify here:						
Enter Requisition								
- Review Requisition Activity								
- D Review Applicants								
Internal Job Posting	L							
Applicant Self Service								
Corporate mormation								

This screen is used to request training, view enrolled classes, and to see classes completed in the past.

To enroll in a class, first enter an **Effective Date**, then select a class under the **Other training classes available** section. Click [**Submit**] when finished, to submit the request for approval.

Recruiting

Enter Requisition

)	Em	ployee Sel	f Service				Create Re	equisition Show F	ilter Send To	Spreadshee	t Enter Query	🛛 🗈 🍙 Logout
						Requisitions						
-	ID	Date	Job Classification	Requested By	Proposed Hire Date	Proposed Job Title	Proposed Salary	Status	Hiring Office	Recruiter	Position Code	Position Name
•	0000044557	25-Feb-2013	Electrician Sr	BILL G	01-Mar-2013	Chief Estimator		Filled	New York	GB	000000675	Chief Estimator
4	0000044558		SOFTWARE DEVELOPMENT	tauseef	24-Sep-2013	HR Manager		Filled	New York	George	000000672	HR Development Manager
4	0000044559		Non Skilled	George Bai				Filled			000000669	11.62778
•	0000044560		Not Applicable	George Bai		Goal Keeper		Filled			000000678	Goal Keeper
4	0000044561		Carpenter			Carpenter		Filled			000000679	Senior Carpenter
4	0000044562		Software Developer	Imran Ahmed	01-Jan-2011	Senior Java Developer	75,000.00	Pending			000000680	Senior Java Developer
4	0000044563	01-Jul-2015	All Star Description			All Star Def Job Title		Filled			000000674	All Star Position
•	44556	01-Jun-2007	RF New	Kevin	15-Jun-2007	Exec VP		Filled			EXVP	Executive Vice President
•	1111	04-Sep-2006			18-Sep-2006			Closed			VP1	First Vice President
•	111111111		SOFTWARE DEVELOPMENT	someone	24-Sep-2013	Test Job Title		Active	New York		VP2	Second Vice President
•	KLJK	05-Sep-2006	RF New		19-Sep-2006			Active			PRESIDENT	President
4	REQ-2		Electrician					Hiring In Progress			000000687	tttt
•	REQ-CEO	12-Oct-2007	RF New			Chief Executive Officer		Active	Los Angeles		CEO	CEO
•	REQ-SMGR	01-Mar-2008	Project Manager	Linda	01-May-2008	Sales Manager		Active	New York		SALE MGR	Sales Manager
4	REQ1		RF New					Active	Los Angeles		CIO	Chief Information Officer
То	tal (15 rows)											

This page allows the user to enter a requisition to the HR department to start the hiring process for a new or existing position.

The Hiring Requisitions page starts as a log, displaying all Requisitions. To edit an existing requisition, click its **ID** link. To add a new Requisition, use the [**Create Requisition**] button.

When entering the requisition, the Requisition Name, Job Description and Responsibilities will default from the Position selected. The Desired Attributes of the Requisition will default from the Job Classification. The Requisition Name defaults from the Job Title of the Position. If the Position Name is entered before the Job Classification, the associated Job Classification will be populated. The Hiring Office LOV provides a list of Geographical Areas.

X ^D Re	quisitions				Copy Requisition	Add Requisition	Edit	Delete	Back To Log) ה	Logout
General			Desired Attributes				Actions	;			
	Requisition ID	0000044557		Date	25-FEB-2013						
	Requested By	BILL G		Proposed Hire Date	01-MAR-2013						
JC	ob Classification	Electrician Sr		Status	Filled						
	Position Name	Chief Estimator		Туре	Addition 🗹 Replacement 🗆]					
	Hiring Office	NY New York		Recruiter	MNGR GB						
R	lequisition Name	Chief Estimator		Full Time 🗹 Part Time 🗖	Temporary						
F	Proposed Salary	0.00									
	Job Description	ChiefEstimator									
	Responsibilities	ChiefEstimator									
	Notes	Chief Estimator									

There are three required fields when entering a Requisition: **Requisition ID**, **Job Classification** and **Position Name**.

• The Requisition ID must be unique; it can contain characters or numbers, with a maximum length of 10.

- Once the position is entered, the Requisition Name, Job Description and Responsibilities fields will be updated to match the position's definition.
- The Desired Attributes will default from the Job Classification.

Any of these defaulted fields may be changed, including the Desired Attributes.

Pre-Requisites:

Mandatory: Job Classification, Position Name, Requisition ID.

Optional: Hiring Actions, Skills, Education, Certification and Licenses, Training Courses and Modules, Memberships and Organizations

Review Requisition Activity

Hr Requisition Activity										
Requisitions										
Requisition ID Date Create		ated On 💌 🔯	Job Classification	Job Classification				Search		
Requisition ID	Requisition Date	Proposed Hire Date	Description			Status	Hiring Of	fice		
KLJK	05-Sep-2006	19-Sep-2006	RF New		Active					
44556	01-Jun-2007	15-Jun-2007	RF New		Filled					
REQ-CEO	12-Oct-2007		RF New		Active		Los Angeles			
REQ-SMGR	01-Mar-2008	01-May-2008	Project Manager		Active		New York			
0000044557	25-Feb-2013	01-Mar-2013	Electrician Sr		Filled		New York			
0000044563	01-Jul-2015		All Star Description		Filled					
0000044558		24-Sep-2013	SOFTWARE DEVELOPMENT		Filled		New York			
0000044561			Carpenter		Filled					
0000044559			Non Skilled		Filled					
REQ-2	EQ-2		Electrician		Hiring In Progress					
0000044562		01-Jan-2011	01-Jan-2011 Software Developer			Pending				
11111111		24-Sep-2013	ep-2013 SOFTWARE DEVELOPMENT		Active		New York	New York		
REQ1	Q1		RF New		Active		Los Angeles	Los Angeles		
0000044560			Not Applicable			Filled				
Actions Add										
Action Name	Cost Amount CG St	atus	Notes	Action Date	From Date	To Date	Action taken by	Delete		
Requisition Is Active	0.00 COMPLE	TED Requisition Is Active		20-Jun-2014			George Bai	×		
Requisition Is Filled 0.00 COMPLETED Requisition is filled. Applican		has been hired	16-Jan-2013			HR	×			
Requisition Created	COMPLE	TED Requisition Created		26-Mar-2008			HR	×		

This screen is both an entry and a query screen, and when it first opens, it displays all requisitions. It is used to review the actions taken on one or more requisitions, it allows for the updating of existing actions taken, and it allows the entry of new actions taken.

[Search] - Button

Hr Requisition Activity										
	Requisitions									
	Requisition ID	Date Cre	ated On 💌 🖄	Job Classification		Search				
	Requisition ID	Requisition Date	Proposed Hire Date	Description	Status	Hiring Office				
KLJK		05-Sep-2006	19-Sep-2006	RF New	Active					
44556		01-Jun-2007	15-Jun-2007	RF New	Filled					

To search for Requisitions, use the [Search] button search against the Requisition ID, Date Created and Job Classification fields.

Requisition ID

This field can be used to select a range of Requisition ID's by using the '%' wildcard characters either before or after the value – for example 1% will return any requisition ID that start with the number 1.
Date Created

This is a drop down list that allows the user to select one of 3 values, On, Before or After to determine how to utilize the actual date field. This allows for the querying of requisitions created on a specific date or after a specific date.

Job Classification

This field can be used to select a group of Positions with similar names by using the '%' wildcard characters either before or after the value – for example "Elec%" will return any requisition IDs for any Job Classification where the title of the classification starts with "Elec".

Once the requisition has been found, highlight the requisition clicking on the linked field. This will then display all related action records in the bottom section of the screen.

[Add] – Button (Add New Action Taken)

Hr Requisi	tion Activity							12 🗈	✿ Logout
				Requisitions					-
Requisition ID	(Date Created On	-	Job Classification				9	earch 🗧
Requisition ID	Requisition Date	P	roposed Hire Date	Description		5	itatus	Hiring Offic	e
KLJK	05-Se	p-2006	19-Sep-2006	RF New		Active			
44556	01-Ju	n-2007	15-Jun-2007	RF New		Filled			
REQ-CEO	12-0	ct-2007		RF New		Active A	dd] button	Los Angeles	
REQ-SMGR	01-Ma	ar-2008	01-May-2008	Project Manager		Active		New York	-
				Actions					Add
Action Name	Cost Amount CG	Status		Notes	Action Date	From Date	To Date	Action taken by	Delete
Requisition Is Active	0.00	COMPLETED	Requisition Is Active		20-Jun-2014			George Bai	×
Requisition Is Filled	0.00	COMPLETED	Requisition is filled. Applican	nt has been hired	16-Jan-2013			HR	×
Requisition Created		COMPLETED	Requisition Created		26-Mar-2008			HR	×

To add an action to the requisition, use the [Add] button of the Actions section.

This will open up an area just under the bar where the action information can be entered:

Hr Requisi	tion Activity							n Logout				
Requisitions												
Requisition ID	Date 0	Created On 💌	20	Job Classification			Se	earch 😑				
Requisition ID	Requisition Date	Proposed Hire D	ate	Description		Status	Hiring Office					
KLJK	05-Sep-200	06	19-Sep-2006 RF Ne	ew	Activ	e						
44556	01-Jun-200	07	15-Jun-2007 RF Ne	ew	Filled							
REQ-CEO	12-Oct-200	07	RF Ne	ew	Activ	e	Los Angeles					
REQ-SMGR	01-Mar-200	08	01-May-2008 Proje	ct Manager	Activ	e	New York	-				
			Actio	ns			Si	ave Cancel				
Action Name Select A	iction 💌	Cost Amount CG		Status Pending	 Action Da 	te 07022017 🔯 Ac	From Date	R.				
	ii.						10 bate	E@				
Action Name	Cost Amount CG	Status	Not	tes	Action Date	From Date To Date	Action taken by	Delete				
Requisition Is Active	0.00 COM	MPLETED Requisition Is	Active		20-Jun-2014		George Bai	×				
Requisition Is Filled	0.00 COM	MPLETED Requisition is	filled. Applicant has b	been hired	16-Jan-2013		HR	×				
Requisition Created	COM	MPLETED Requisition Co	reated		26-Mar-2008		HR	×				

- Selected the Action Name from the drop down list (Required)
- If applicable enter the cost amount, this is for reference only
- Enter the status
- Enter the date of the action (Required)
- Enter the employee who performed the action. This defaults to the user id.
- Enter any notes and dates if necessary.

When complete use the [Save] button.

Update Existing Action

Hr Requisi	ition Activity					₽ 0	🗓 🏠 Logout
			Requisitions				*
Requisition ID	Date Crea	ited On 💌 🔯	Job Classifica	tion			Search =
Requisition ID	Requisition Date	Proposed Hire Date	Descr	ption	Status	Hiring C	Iffice
KLJK	05-Sep-2006	19-Sep-2006	RF New		Active		
44556	01-Jun-2007	15-Jun-2007	RF New		Filled		
REQ-CEO	12-Oct-2007		RF New		Active	Los Angeles	
REQ-SMGR	01-Mar-2008	01-May-2008	Project Manager		Active	New York	-
			Actions				Save Cancel
Action Name ACTIVE		Cost Amount CG þ	Status	COMPLETED Act	ion Date 20062014	Action taken by MIKE	-
Requisition Notes	n Is Active					From Date To Date	متا تك
Action Name	Cost Amount CG St	tatus	Notes	Action Date	From Date	To Date Action taken by	Delete
Requisition Is Active	0.00 COMPLE	TED Requisition Is Active		20-Jun-2014		George Bai	×
Requisition Is Filled	0.00 COMPLE	TED Requisition is filled. Applicant	t has been hired	16-Jan-2013		HR	×
Requisition Created	COMPLE	TED Requisition Created		26-Mar-2008		HR	×

To edit an existing action taken, click its **Action Name** link. The selected Action will then be editable in the display area just above the table, as shown above. Update the information as required and click [**Save**].

Review Applicants

	Employe	e Self Service	Add Applicant	Show Filter	Send To Spreadsheet	Enter Query	2 🗈 🍙	Logout
		Applicant						
*	Applicant # 🔺	Applicant Name				Job Classification	Apply Date	e 🔺
•	1234567890123546	John Doe				Not Applicable	15-Jul-2015	
•	1234567890123547	Harper Steven					15-Jul-2015	
4	1234567890123549	George Bai					22-Jul-2015	

This page allows administrators to review, edit and delete applicant's information, and to add new applicants.

[Add Applicants] - Button

Applic	ant:								
eneral Personal	Miscellaneou	s Attributes	Emp.History	Attachments	References	Notes	Application History	HR Documents	Additional Inform
So	urce of Applicant	-Other				Appli	cation Date 07-Feb-2017	,	
	Applicant No.					Last Mo	dified Date		
	Last Name					F	First Name		
	Middle Name					E	mployed As		
SSN (ne	o space/hyphen)						Status		
ing Address									
	Address 1						Address 2		
	Address 3						ZIP		
	Country	A					State	A	
	County	*					City	A	
ical Address									
	Address 1						Address 2		
	Address 3						ZIP		
	Country						State	A	
act									
uot	Home Phone					V	Vork Phone		
	Cell Phone						Pager		
	Home Eax						Work Eax		
	E-Mail Address						TOTAT DA		
Of Interest	E Tuli Adul C35								
of interest		Accounting	la	bor 🗐	Management 🦳	sda	isdasda 🔲 Softw	are Development 🥅	
	Area Of Interest	Other :				500			
graphical Area									
G	eographical Area	Los Angeles 📃	New	York 📃	Ohio 📃				

To add an applicant, click the [Add Applicant] button along the top of the screen, which brings up the screen shown above.

After filling out all relevant and mandatory fields, click [Save].

User have an option to **Delete**, **Edit** or **Print** applicants information, as well as go back to list of existing applicants [**Back to Log**].

Edit Existing Applicant

To edit an existing Applicants record, when the screen is in Log mode, click the applicant's **Applicant Name** link. On the next screen, click the [**Edit**] button along the top of the screen.

Applicant Self Service

Applicants		Delete	Add Ed	it Print	Back To Log	🕻 🖪 🏠 Logout
	Sign In					
	olgn m					
Ap	licant's e-mail address:					
En	er Password:					
	Sign In Forgot Password?					
Re	ister New User					

This screen allows users to create applicant profiles, to apply for different positions.

• A new user has to register by clicking [Register New User].

(Create Applicant	
Enter Email Address:	:	
Enter Password:		
Re-enter Password:		
٩	Create New Account Cancel	

• Then an applicant has to fill out an E-mail address and Password. When the applicant fills out the application, he can choose the position that he wants to apply for by using the **Position you are applying for** list of values.

Applicant: Austin Jan	e			[Save] Cancel]
General Education Skills	License/Certificate Training	Membership Employment	References Add	ditional Information Application History
Position you are applying for	r: Accountant	Full Time	Part Time	Temporary
Salary Desired	:Select Pay Period	Requisition Number:Not Specified	•	
Personal				
First Name	Austin	Last Name	Jane	
SSN (no space/hyphen)		E-Mail Address:		
Home Phone:		Work Phone:		
Street:		Suite:		
City, State :		ZIP/Postal Code:		
Source of Applicant	Other 👻	Application Date		
Gender	Male	Ethnicity/Race	Decline to Respond	•
Area Of Interest				
Area Of Interest	Administration Architecture and Plan Project Management Superv Other :	ning Carpentry	Electrical	Financials Position 📄 HVAC Specialization 📄
Geographical Area				
Geographical Area	East Coast USA 🥅 Midwest US	SE Northwest USA	South USA	US North East West Coast USA

• After logging in, the applicant fill outs all relevant and mandatory fields and click [Save].

Applicant: Austin Jane				Edit Upload Resume Logout
General Education Skills	License/Certificate	Training Membership Employment	References Additional Inf	formation Application History
Position for which you are applying:		Full Time 🗹	Part Time	Temporary 🗌
Salary Desired:				
Personal				
First Name:	Austin		Last Name: Jane	
SSN (no space/hyphen)	http://	test4.10 emis en 7785 (emistesta 10 📃 🗉 🗙	E-Mail Address:	
Home Phone:	Ce nup,//	Close	Work Phone:	
Street	Attp://	/test4v10.cmic.ca:7785/cmictestv10x/HrAppISelfServ	Suite:	
City, State:		*	ZIP/Postal Code:	
Source of Applicant		Upload Resume	Application Date	
Gender	Male	Browse	Ethnicity/Race Decline to Respond	
Area Of Interest Area Of Interest	Administre Project Manager Oli		Electrical 🗌 Financial	Is Position HVAC Specialization
Geographical Area		*		
Geographical Area	East Coast	Upload Resume	South USA US N	orth East West Coast USA
Files Uploaded		FJ		
File Name	_	Upload Date	Note	Delete

• Applicant can upload his/her resume by clicking [**Upload Resume**] as well as Edit his/her profile by clicking [**Edit**] buttons on the right upper corner of the screen.

• On the **Application History** tab, applicants can see the application history and status of the application.

	Applicant	Austin Jane											
General	Education	Skills	Lice	nse/Certificate	Training	Membe	ship	Employment	R	eferences	$\backslash [$	Additional Information	Application History
	Application Code			Job Classific	cation Code		Des	cription		Last Updated		Status	Requisition No
2889433		1-	412			Aci	ountant		Feb/15/2013			Applied	

Corporate Information

Forms Request

The screen is used as display-only mode of the Forms Request node in Employee Self Service.

Manager Self Service

Request Approval - Screen

Employee Self Service	Pers	sonal Infor	mation Change F	Request Approv	val				Clear	Searc
Employee Self Service				Personal Info	ormation Change Request	Approval				
Personal Information	Employee Number			Effective Date On	-		Reques	t Type -Select-	-	
Corporate Learning	Transaction No	Create Date	Request Description	Employee Number	Employee Name	Effective Date	Comments	Request Status	Approve	Reje
Recruiting	190	25/Nov/2016	Profile	MF0001	Mike Fernandes	25/Nov/2016		Submitted	Approve	Reje
Corporate Information	182	25/Nov/2016	Profile	AB-34356	Anand Badinger	25/Nov/2016		Submitted	Approve	Reje
Security	181	25/Nov/2016	Profile	MR	Mike Rock	25/Nov/2016		Submitted	Approve	Reje
Request Approval	179	04/Jun/2015	Vacation Request	LG1-BW-HR5	Jane Austin	04/Jun/2015		Submitted	Approve	Reje
Auto Approved Request Lis	177	04/Jun/2015	Vacation Request	LG1-BW-HR5	Jane Austin	04/Jun/2015		Submitted	Approve	Rej
Manager Change Request	176	03/Jun/2015	Vacation Request	LG1-BW-HR5	Jane Austin	03/Jun/2015		Submitted	Approve	Rej
On Board Action	175	02/Jun/2015	W4	GL-WK-SAL123	GL-WK SAL23	01/May/2015	W4-for testing	Submitted	Approve	Rej
Open Enrolment Control Set	169	03/Sep/2014	Profile Under Review	LG1-BW-HR5	Jane Austin	01/Jan/2012		Under Review	Approve	Rej
Qualify Event Setup	157	10/Jun/2014	Dependent	LG1-BW-HR5	Jane Austin	03/Jun/2014		Submitted	Approve	Rej
- Open Enrollment Approval	126	31/Oct/2013	Vacation Request	LG1-BW-HR5	Jane Austin	31/Oct/2013		Submitted	Approve	Rej
Qualifying Event Approval	115	25/Apr/2013	Profile	JCR TEST SAL	Test Salaried	01/Jun/2013		Submitted	Approve	Rej
Dependent Approval	21	05/Jun/2012	Direct Deposit	UFAR-EMP-01	Farnaz Harraji	01/Feb/2012		Submitted	Approve	Rej
Open Enrollment Status	20	25/Nov/2011	Profile	UFAR-EMP-01	Farnaz Harrai	25/Nov/2011		Submitted	Approve	Rei
Qualifying Event Status	8	11/Aug/2011	Emergency Contact	SWC-WK-SAL3	Suzette Watson	01/Aug/2011		Submitted	Approve	Rei
Dependent Enrolment Appro	-			Divideo	Delles Malass	0000-0000				

Submitted requests, excluding those from Open Enrollment, are found in the **Request Approval** (Personal Information Change Request Approval) screen, where they may be approved or rejected. The blue **Approve** and **Reject** links at the end of each row are used to approve and reject requests.

When the request is approved or rejected, an e-mail notification is sent to the Employee's e-mail address, as specified on their Employee Profile.

The following table provides details for the columns of this screen:

Column	Det	tails
Transaction No	This is an identifying transaction number for a launch the appropriate approval screen, such a Transcation No. 182 Effective Date. 2016-11-25 Comments Personal information Last Name* Badinger First Name* Anand Middle Name M	a Change Request, which is also a link to as the one below for Profile Change Requests: <u>Edit Approve Reject Close</u> Personal information Last Name Badinger First Name Anand Middle Name
	Prefix Title Suffix to Name Marital Status Single Date of Birth 010188 Mailing Address	Prefix Title Suffix to Name Marital Status Single + SSN (no space/hyphen) 654321987 Date of Birth 010188 Mailing Address
	Address flow if E64	Address they t 66.4
Create Date	Date Change Request was created.	
Request Description	Type of employee information for Change Re Dependent).	equest (e.g., Profile, Vacation Request, W4,
Employee Number	Employee's employee number.	

Employee Name	Employee's name.							
Effective Date	Date change is to be effective.							
Comments	Use this field to enter comments/notes for the employee, in regards to the approved or rejected Change Request. As shown below, if comments are entered, the Show All Comments link will be visible when the approved/rejected record is selected by the employee. Transaction No Effective Date Comments 194 - 2017-01-13(Approved) ▼ Instructions: Bhow All Comments Comments for selected record 194 - 2017-01-13(Approved) ▼ Instructions: Bequest for change of employee profile Effective Date [01/09/2017] Comment I currently don't have a work number yet, but when provided, I'll enter it via ESS. Effective Date First Hame Joannie Hiddle Hame							
	Status of Change Request:							
	Submitted	Submitted by Employee, and not yet modified by an admin.						
Request Status	Under Review	Change Request was edited and saved in the screen launched by clicking the Transaction No link, using the screens [Edit] and [Save] buttons.						
	Note that approved and rejected Change Requests are removed from this screen. Only Change Requests requiring approval operations are listed.							
Approve	Click to approve the Change Request; once approved, it is removed from this screen, and an e-mail notification is sent to the employee.							
Reject	Click to reject the Change Request; once rejected, it is removed from this screen, and an e- mail notification is sent to the employee.							

Approval Privileges for ESS Admins

XP Hr Rol	le Maintanence				
\$ 🕀 🗄 HCM Manage 📤					Save Cancel
Search			HR Role Maintenand	ce in the second se	
	Code ESS-MNGER	Description	ESS Manager		
🖃 🗁 HCM Manager	Select All Privileges	٨٣٣٣٥٢	al Drivilance		
Hiring Require	Employee Profile	Approv	al Privileges	yee Direct Deposit	
E D Applicant Ma	Employee Vacation Balance		🕇 🔍 Emplo	vee Pav Stub	
🕀 🗀 Workforce P	Object (🔽 Select All Objects)	View (🗹 Select All)	Edit (🔽 Select All)	Reject (🗹 Select All)	Approve (🗹 Select All)
Training	2 Drofile			27	
	Emergency Contact		V		

Sample of HR Role Maintenance screen; standard Treeview path: HCM > File Maintenance > HR Role Maintenance.

Change Request records can be viewed, approved and rejected by ESS Administrators, depending on the Approval privileges granted to the HR Security Role assigned to them.

Also, for Change Requests to change Profile Information, if the ESS Administrator has the "**Edit**" Approval privilege for Profile Information, the administrator can edit the submitted Change Request.

For further details, please refer to the HR Security Roles Setup section of this guide.

Viewing Change Requests

To view the details of a submitted Change Request, simply click its **Transaction No** link, and a popup will appear to display its details.

Approving & Rejecting Requests

xP	Employee Self S	ervice										200	Logou
\$∃± Search	Employee Self Service	CMIC	Person	al Informat	ion Chan	ge Reque	est Appr	oval			Cle	ar Se	arch
🖃 🗁 En	nployee Self Service					Perso	onal Informatio	on Change Request Approval					
🗉 🛄	Personal Information	Employee No	umber			Effective [Date On 💌	1		Request Type -Select-	-		
	Payment Administration Corporate Learning	Transaction No	Create Date	Request Description	Employee Number	Employee Name	Effective Date		Comments		Request Status	Approve	Reject
	Recruiting	194	13/Jan/2017	Profile	JP	Jasmine Pansaki	09/Jan/2017	I currently don't have a work num	ber yet, but when provi	ided, I'll enter it via ESS.	Submitted	Approve	Reject
📄 🖻 🛄	Corporate Information	182	25/Nov/2016	Profile	AB-34356	Anand Badinger	25/Nov/2016				Submitted	Approve	Reject
	Security Manager Self Service	179	04/Jun/2015	Vacation Request	LG1-BW-HR5	Jane Austin	04/Jun/2015				Submitted	Approve	Reject
	Request Approval	177	04/Jun/2015	Vacation Request	LG1-BW-HR5	Jane Austin	04/Jun/2015				Submitted	Approve	Reject
-	Auto Approved Request Lis	176	03/Jun/2015	Vacation Request	LG1-BW-HR5	Jane Austin	03/Jun/2015				Submitted	Approve	Reject
	Manager Change Request	175	02/Jun/2015	W4	GL-WK-SAL123	GL-WK SAL23	01/May/2015	W4-for testing			Submitted	Approve	Reject
	On Board Action	169	03/Sep/2014	Profile Under Review	LG1-BW-HR5	Jane Austin	01/Jan/2012				Under Review	Approve	Reject
	Open Enrollment Period Setu	157	10/Jun/2014	Dependent	LG1-BW-HR5	Jane Austin	03/Jun/2014				Submitted	Approve	Reject
_	Qualify Event Setup	126	31/Oct/2013	Vacation Request	LG1-BW-HR5	Jane Austin	31/Oct/2013				Submitted	Approve	Reject
-	Open Enrollment Approval	115	25/Apr/2013	Profile	JCR TEST SAL	Test Salaried	01/Jun/2013				Submitted	Approve	Reject
	Qualifying Event Approval	21	05/Jun/2012	Direct Deposit	UFAR-EMP-01	Farnaz Harraji	01/Feb/2012				Submitted	Approve	Reject
_	Self Service Control Setup	20	25/Nov/2011	Profile	UFAR-EMP-01	Farnaz Harraji	25/Nov/2011				Submitted	Approve	Reject
	Open Enrollment Status	8	11/Aug/2011	Emergency Contact	SWC-WK-SAL3	Suzette Watson	01/Aug/2011				Submitted	Approve	Reject
-	Qualifying Event Status	5	09/May/2011	Emergency Contact	DM100	Dallas McLean	02/May/2011				Submitted	Approve	Reject
	Dependent Enrollment Appro Employee Address Change											-	

To approve and reject Change Requests, the **Approve** and **Reject** links on the main Request Approval screen must be used, even if the [**Approve**] or [**Reject**] buttons were used in the popup launched by clicking a Change Request's **Transaction No** link.

When a request is approved or rejected, the Employee will be notified via e-mail, and the approved/rejected record will be available to the Employee in the screen used to request the change, as shown below.

xP	Employee Self Se	rvice			Save Submit Cancel 🚺 🏠 Logou
\$ = ±	Employee Self Service	Transaction No	Effective Date	Comments	
Search	Go				191 - 201 /-01-13(Approved) 193 - 2017-01-13(Approved)
E Emr	Novee Self Service	Instructions:			
	Personal Information	Make changes to the e	mployee Profile.		
	Profile Information		R	equest for cha	nge of employee profile
	W-4 Information	Effective Date	🖄 Comn	nent	

Communication Between Employees & Admins via Comments

				Edit	Approve	Reject	Close	
Transcation No 203	Effective Date 2017-01-30							
2017-01-30 No home	phone provided, as I only have a cell phone.	1						
No home phone provide	d, as I only have a cell phone.							
Comments								
		1	D	1.5.6		-		
Pe	rsonal information		Personal information					
Last Name Fernandes	First Name Mike		Last Name Fernandes	First Name	Mike			
Middle Name			Middle Name					
Prefix Title	Suffix to Name		Prefix Title	Suffix to Name				
Marital Status Single 👻	SSN (no space/hyphen) 988543765		Marital Status Single 👻	SSN (no space/hyphen)	988543765			
Date of Birth 071277			Date of Birth 071277					
	Mailing Address		Mailing Address					
Address Line 1 456 Lala Lane		Address Line 1 456 Lala Lane						

Sample of Change Request for Profile Information, with comments entered by employee for administrator.

Communication between Employees and ESS Administrators is done via comments.

As shown above, if comments were entered for the administrator, they would show up in the **Comments** textbox. Also, the **Comments** textbox can be used to provide comments for the employee.

If any comments were entered for the approved/rejected Change Request by an administrator, the **Show All Comments** link will be visible, as shown below, when the approved/rejected record is viewed by the employee.

xP	Employee Self Ser	vice			🗈 🍙 Logout				
\$∃∄	Employee Self Service	Transaction No	Effective Date	Comments	I PREV NEXT 194 - 2017-01-13(Approved) ▼ ▲				
Search	Go	194	2017-01-09	Show All Comments					
=: 🤭 Er 	ployee Self Service	Instructions: Make changes to the emp	oloyee Profile.						
	Profile Information			Request for cha	nge of employee profile				
	IR Information W-4 Information Td1 Information	Effective Date 01/09	2017 Commen	I currently don't have a wo	ork number yet, but when provided, I'll enter it via ESS.				
	Emergency Contacts	Personal information							
	Certification and Licenses	Last Name Pansaki	First N	ame [®] Jasmine	Middle Name				

Profile Information - Change Request

🥹 Mozilla Firefox						
🛈 Martin american / 11 (martin 11 (martin 12 (
	Edit Approve Reject Close					
Transcation No 190 Effective Date 2016-11-25						
Further information is required. Please provide a phone number.						
Comments						
Personal information	Personal information					
Last Name ' Fernandes First Name ' Mike	Last Name ' Fernandes First Name ' Mike					
Profix Title	Profy Title					
Marital Status Single SSN (no space/byohen) 988543765	Marital Status Single SSN (no space/byohen) 988543765					
Date of Birth 071277	Date of Birth 071277					
Mailing Address	Mailing Address					
Address Line 1 456 Lala Lane	Address Line 1 456 Lala Lane					
Address Line 2	Address Line 2					
City Chicago State Illinois	City State Illinois					
ZIP 87654 Country United States of America	ZIP 87654 Country United States of America					
Physical Address	Physical Address					
Address Line 1	Address Line 1					
Address Line 2	Address Line 2					
City State	City State					
ZIP Country 🗸	ZIP Country 💌					
Contact	Contact					
Home Phone Work Phone	Home Phone Work Phone					
Home Fax Work Fax	Home Fax Work Fax					
Cell Phone Work Cell Phone	Cell Phone Work Cell Phone					
Pager	Pager					
E-Mail Address mike.fernandes@cmic.ca	E-Mail Address mike.fernandes@cmic.ca					
Work Email Address	Work Email Address					
Attac	:hment					
	Upload					
File Name Upload Date	Note Action					
No Reco	rds Found					

Sample of Profile Change Request Approval screen.

Shown above is a sample of the Change Request popup for Profile Information.

For Change Requests for Profile Information, if the ESS Administrator has the "**Edit**" Approval privilege for Profile Information, the administrator can edit the submitted Change Request via the [**Edit**] button.

To edit a submitted Change Request for Profile Information, press the [**Edit**] button and make any necessary changes to the record on the left pane. The Request Status on the Personal Information Change Request Approval screen will be changed from "**Submitted**" to "**Under Review**".

To approve a submitted request, press the [**Approve**] button. Once approved, the Employee Profile will be updated with the new changes and a history record will be created in Payroll. The Current Profile will be updated with the new changes, and it will be available for editing in the Profile Information screen. A history of approved records is kept via the drop-down list at the top of the Profile Information screen. Also, the request will be removed from the list of submitted requests in the Request Approval screen.

To reject a submitted request, press the [**Reject**] button. The rejected record will become available for editing again by the employee in the Profile Information screen so that it may be re-submitted. The request will also be removed from the list of submitted requests in the Request Approval screen.

W-4 – Change Request

Transcation No	Date	Comments	A	Approve Reject Close					
491	2010-11-22	Updating W-4 2010							
Effective Date 10152010	Updating Comment W-4 2010			Page 1, go to page 2					
Form W-4 (2010) Purpose. Complete Form W-4 so that correct federal income tax from your jr W-4 each year and when your person Exemption from withholding. If yo 3, 4, and 7 and sign the form to valida February 18, 2011. See Pub. 505, Tax Note. You cannot claim exemption for exceeds 3550 and includes more than example, interest and dividends) and (dependent on ther tax return. Basic instructions. If you are not ex Allowances Worksheet below. The your withholding allowances based or adjustments to income, or two-earner	your employer can withhold the pay. Consider completing a new Form all or financial situation changes u or exempt, complete only lines 1, 2, e t. Your exemption for 2010 expires Withholding and Estimated Tax. w withholding if (a) your income \$300 of unearned income (for b) another person can claim you as a empt, complete the Personal worksheets on page 2 further adjust intemized deductions, certain credits, multiple job situations.	Complete all worksheets that apply. However, you may claim fewer (or zero) allowances. For regular wages, withholding must be based on allowances Head of household. Generally, you may claim head of household filing status on you tax tertur only if you are unmaried and pay more than 60% of the costs of keeping up a home for yourself and your dependent(s) or other qualifying individuals. See Pub. 501, Exemptions, Standard Deduction, and Filing Information. for information. Tax credits . You can take projected tax credits into account in figuring your allowable muber of withholding allowances. Credits for child or dependent care expenses and the child tax credit may be claimed using the Personal Allowances Worksheet bebw. See Pub. 501, how Do I Adjust IV Tax Withholding, for information on converting your other credits into withholding allowances. Norwage income. If you have a large amount of nonwage income, such as interest or dividends, consider making estimated tax	payments using Form 1040-ES, Estimated Tax for Indi may ovve additional tax. If you have pension or annul find out if you should adjust your withholding on Form Two earners/Multiple jobs. If you have a working job, figure the total number of allowances you are en using worksheets from only one Form 1V-4. Your with accurate when all allowances are claimed on the for paying job and zero allowances are claimed on the of details. Nonresident alien. If you are a norresident alien, s Supplemental Form W-4 Instructions for Nonresident. This Form. Check your withholding. After your Form W-4 taks see how the around you are having withheld compar tax for 2010. See Pub. 919, especially if your earning or \$180,000(Married).	viduals. Otherwise, you y income, see Pub. 919 to ; W-4 or W-4P. spouse or more than one titled to calim on all jobs tholding usually will be most m W-4 for the highest hers. See Pub. 919 for see Notice 1392, Aliens. before completing se sflect, use Pub. 919 to es to your projb. 919 to se to your projb. 919 to se to your projb. 919 to					
		Personal Allowances Worksheet (Keep for your records.)							
A Enter "1" for yourself if no one else	e can claim you as a dependent			A 1					
You are single and have B Enter "1" if: You are married, have o Your wages from a sec	You are single and have only one job; or B Enter *1* it. You are married, have only one job; and your spouse does not work; or B Conter *1* it. You are married as second in by course pouse is wanted or the total of both) are \$1,500 or less B								
C Enter "1" for your spouse. But, you	may choose to enter "-0-" if you are m	arried and have either a working spouse or more than one job. (Entering "-0-" ma	y help you avoid having too little tax withheld.)	c 1					
D Enter number of dependents (othe	r than your spouse or yourself) you wi	II claim on your tax return		D 2					
E Enter "1" if you will file as head of h	nousehold on your tax return (see con	ditions under Head of household above)		E 1					
F Enter "1" if you have at least \$1,800 (Note, Do not include child support	of child or dependent care expens payments, See Pub, 503, Child and Dep	es for which you plan to claim a credit endent Care Excenses, for details.)		F 1					
G Child Tax Credit (including addition If your total income will be less than If your total income will be between	al child tax credit). See Pub 972, Child T \$61,000 (\$90,000 if married), enter "2" \$61,000 and \$84,000 (\$90,000 and \$11	Tax Credit, for more information. for each eligible child; then less "1" if you have three or more eligible children. 9,000 if married), enter "1" for each eligible child plus "1" additional if you have	six or more eligible children.	G 2					
H Add lines A through G and enter tota	al here. (Note. This may be different fro	m the number of exemptions you claim on your tax return.)		н 9					
For accuracy,complete all works that apply.	sheets If you plan to itemize or clain If you have more than one jo the Two-Earners/Multiple Jo If neither of the above situatio	a adjustments to income and want to reduce your withholding, see the Dedu bo or are married and you and your spouse both work and the combined e bobs Worksheet on page 2 to aviol having too lift that xwithheld. ns applies, stop here and enter the number from line H on line 5 of Form W-4 but	ictions and Adjustments Worksheet on page 2. arnings from all jobs exceed \$18,000 (\$32,000 if marri elow.	ed) see					
Form W-4 Department of the Treasury Internal Revenue Service	Whether you are entitled to claim	Employee's Withholding Allowance Certif a certain number of allowances or exemption from withholding is su be required to send a copy of this form to the IRS.	icate bject to review by the IRS. Your employer may	OMB No. 1545-0074 2010					
Type or print your first name and mid	dle initial.	Last Name	Your social security number						
Home address(number and street or	rural route)	Juonas	315695012						
		3 🔍 Single 🔍 Married 🔍 Marrie	ed, but withhold at higher Single rate.						
		Note. If married, but legally separat	ed, or spouse is a nonresident alien, check the "Single	" box.					

To access the W-4 for approval, click on the **Transaction No.** of the request to be approved in the Request Approval screen.

To approve the W-4 request, press the **[Approve]** button. Once approved, the Employee Profile in Payroll will be updated. A new Employment History record will be created, and the Federal Filing Status will be updated to reflect the status (Single/Married) entered in line 3 on the W-4. The Federal Filing Status for "Single" is "01" and "Married" is "02".

The Primary Exemption field on the **Tax Tab** of the Employee Profile will be updated with the value entered in line 5 on the W-4 screen. Federal Withholding tax will be inserted in the Overrides pop-up on the **Tax** tab of the Employee Profile, with the value entered in line 6 on the W-4. The Tax Amount will be the value from line 6 and the Amount Type will be "00" (Additional Tax). Once approved, the Original W-4 will be editable again, and will be updated with the latest changes that were approved.

To reject the W-4 request, press the [**Reject**] button. The record with the same transaction number will be editable in the W-4 Information screen for further changes.

The W-4 may also be approved or rejected by clicking on the Approve or Reject link in the Personal Information Change Request Approval screen.

Auto Approved Request List – Screen

	Auto Approved Request List											
Transaction No	Request Create Date	Request Description	Employee Number	First Name	Last Name	Request Effective Date	Comments	Submit Status				
188	11/25/2016	Certificate/License	AB-34356	Anand	Badinger	11/25/2016		A				
117	04/25/2013	Certificate/License	JCR TEST SAL	Test	Salaried	04/07/2013	just got it	A				
91	02/11/2013	Membership	LG1-BW-HR5	Jane	Austin	01/01/2013		A				
83	02/11/2013	Certificate/License	LG1-BW-HR5	Jane	Austin	01/01/2013		A				
78	02/11/2013	Skill	LG1-BW-HR5	Jane	Austin	01/01/2013		A				
53	01/28/2013	Membership	SWC-WK-SAL3	Suzette	Watson	01/01/2012		A				
51	01/23/2013	Membership	LG1-BW-HR10	Kim	Preston	01/01/2013		A				
45	01/02/2013	Skill	SUS-EMP01	Glenda	Stimpson	01/02/2013	for 12.73003 testing	A				

Submitted and approved requests to add/remove Skills, Education, Certifications/Licenses and Memberships are displayed in this log. Submitted requests are displayed with a status of "**S**", and approved requests are displayed with a status of "**A**".

Skills, Education, Certifications/Licenses and Memberships with a status of "A" have either been approved manually or automatically without going through the normal approval process.

Requests are automatically approved after submittal when the flag is checked in the Self Service Control Setup screen.

Auto Approved Request List												
ate Date	Request Description	Employee Number	First Name	Last Name	Request Effective	Date		Comments				
	Skill	🖉 List of Skills - Windows Int	List of Skills - Windows Internet Explorer									
	Skill	Transaction No	Date		Comments		340		Close			
	Membership	340	2010-11-1	0	undating ekille							
	Education	340 2010-11-10 updating Skills										
	Skill	Request for change of	equest for change of skills									
	Education						rience					
	Skill	Skill Code	Skill Description		(Months)		Status					
	Education	ADM-1001	Experience - MS Office				52	Added				
	Education	If skills are not in the system	skills are not in the system, please specify here:									
	Skill	······································	,									
	Skill								-			
	Membership											
	Certificate/License											
	Education								T			
	Training				Attachment							
	Membership				Autachiment							
	Certificate/License	File Nam	e		Upload Date)		Note				
	Certificate/License				lo Records Found							
	Training											
	Certificate/License											
	Training											
	Certificate/License											

Users may click on the Transaction No. of any record to view the details.

Manager Change Request - Screen

Employee Self Ser	vice								
Skils 🔺	Instructions:								
Certification and Licenses	How to make a change request for em	onlovee profile							
Degrees		iproyee prome							
Memberships				Request for chan	nge of employe	e profile			
Interim Evaluation	Employee No								
Annual Evalution									
Discipline History Discipline History	Transaction	No	Date	Comm	nents		A PREV NEXT D		
Conen Enrolment									
Pequest and Review Vacation Balance									
Pay Stub Printing		Action	Select ·		Effective Date	2			
Direct Deposit Accounts		Comment							
Year End Summary									
Corporate Learning		Personal Co	HP Info						
Class Enrolment		Tersoniai Con	inputy include						
Training Nomination	Personal information								
Training Request							-		
E C Recruiting		Last Name		First Name		Middle Name			
- inter Requisition				Suffix to					
Review Requisition Activity		Prefix Title		Name					
- Carlo Review Applicants									
- Applicant Self Service		Date of Birth	2	Statue Not specifi	ed 💌	SSN (no space/hyphen)			
😑 🗁 Corporate Information				Status					
- Forms Request									
Gecurity				Mail	ling Address				
E C Manager Self Service		A data and the		Addase	- 0				
Request Approval		Address Line		Addres	s Line				
Auto Approved Request List									
Manager Change Request		Address Line			ZIP				
Un Board Action		3							
Open Enrolment Control Setup									
Oualify Event Setup				Phys	ical Address				
Open Enrolment Approval				1 11/3	iour Address				
Qualifying Event Approval		Address Line		Addres	s Line				
Dependent Approval		1 1			2				
Self Service Control Setup		Address Line			710				
Open Enrollment Status		3			2.0				
Dependent Enrolment Approval							-		
		i intv	State		Cour				

This screen is used by administrators to request a change to an Employee Profile record.

Request for change of employee profile										
Employee No [®] LG1-BW-SAL	1 Tiago Spliter									
Transaction No	Date	Comments			PREV NEXT	🕑 17 - 2013-02-15(Submitted) 💌				
17	2013-02-15									
	Action Increament -		Effective Date 01-10-2	2012 🖳						
	Comment									
Personal, Company, HR Info.										
	Company information									
	Payroll Company LG1	▲	Home Company	LG1 Sheppard Constructions Inc	•					
	Payroll Department 00	Company Level	Home Department	00 Company Level						
	Pay Run LGBW	LG1 Biweekly	Pay Group	SAL SALARIED						
	Grade	▲	Trade	140 Accountant	•					
			Rates/Salary							
	Annual Salary 160000		Hourly Rate							
	[
	Federal Filling Status 01	▲	State Filling Status							
	City Filing Statue	▲								
	Primary Exemptions		Secondary Exemptions							

The admin chooses the Employee Number, Action, and Effective Date, then makes a required change.

Then [Submit] the change.

After the request for change has been submitted, it cannot be edited or changed on the same screen.

On Board Action – Screen

This functionality is currently not used.

Open Enrollment Control Setup – Screen

This Control File for Open Enrollment is used to specify the Open Enrollment Rule, Qualified Event Days and Confirmation Statement.

If the Open Enrollment rule is set to Passive Enrollment, the employee may review the changes made to their benefit/deduction elections but they do not have to make any changes and their current plans will continue after the period end date. For Non-Passive Enrollment, the employee must make their elections before the period end date.

The Qualified Event Days is the number of days that the employee has to make their benefit elections after the effective date of the Qualifying Event which is specified when reporting the Qualifying Event. The period start date for the Qualifying Event in the Open Enrollment screen will be the Qualifying Event effective date. The period end date is the Qualifying Event period start date + the number of days in the Qualified Event Days set up in the Control File.

The Confirmation Statement entered here will be displayed when the user submits changes to their benefit/deduction elections for approval.

Open Enrollment Period Setup – Screen

				Add
		Open Enrollment Perio	ls	
Year	Start Date	End Date	Effective Date	Action
2012	01/01/2012	01/01/2014	01/01/2012	× 🖉
2013	01/01/2013	12/31/2013	01/01/2013	Si 🗙
2011	01/01/2011	12/31/2011	01/01/2011	Si 🗙
2014	01/01/2012	12/31/2014	05/01/2014	X

The time during which the employee may make changes to their benefit/deduction elections is specified in this screen. This period range applies to "General" changes to the benefit/deduction elections, not Qualifying Event benefit/deduction elections.

Only one link (e.g. "Enroll Now") will appear in the Open Enrollment screen at a time. If the link is on a "General" period, it will only appear during the period dates specified here. The Start Date and End Dates in the Welcome to Open Enrollment screen will reflect the period dates entered here. After this time, the period will not be displayed in Open Enrollment and the employee will not be able to make any changes in that period.

Qualify Event Setup - Screen

					Auu							
	Qualify Events											
Code	Name	Description	Profile Confirmation Required	Dependent Confirmation Required	Action							
ADOPTION	Adoption - Qual Event	Adoption of child - Qualifying Event	N	Y	🖄 🗙							
BIRTH	Birth of child - Qual Event	Birth of a child - Qualifying Event	N	Y	🖄 🗙							
MARRIAGE	Marriage - Qual Event	Marriage - Qualifying Event.	Y	Y	🕅 🗙							

This setup screen allows employees to define different types of Qualifying Events.

These Qualifying Events may be submitted for approval so that new enrollments or changes to current elections may be made. To add a Qualifying Event, press the [Add] button.

					Save Cancel
		Qualify Ev	ent Setup		
	Code MARRIAGE		Name Marriage - Qual Event		
	Marriage - Qualifying Event.				*
	Description				
					-
Require Confirmation	n of Profile Change 🔽	Require Confirmation of Dependent	Change 🔽		
	e test	Qualify	Events		
Code	Name	Description	Profile Confirmation Required	Dependent Confirmation Required	Action
ADOPTION	Adoption - Qual Event	Adoption of child - Qualifying Event	N	Y	Si 🗙
BIRTH	Birth of child - Qual Event	Birth of a child - Qualifying Event	N	Y	Si 🗙
MARRIAGE	Marriage - Qual Event	Marriage - Qualifying Event.	Y	Y	Si 🗙 🗹

Enter the Code, Name and Description. Check the Require Confirmation of Profile Change flag and/or Require Confirmation of Dependent Change flag if necessary. When done, press the [**Save**] button or [**Cancel**] to exit. If the Require Confirmation of Profile Change flag or Require Confirmation of Dependent Change flag is checked, then the Profile request or Dependent request associated with this Qualifying Event must be selected when submitting a Qualifying Event for approval.

Open Enrollment Approval – Screen

C Salast	Employee No.				Employee	Name		Confirmation ()ate		Confirmatio	n Number	
	SS WK HD37			lessica Lange	2.1.0.00					4884			
	55-1110-111051			Seasica Lange						4004			
	SS-WK-SAL40			Hazel Patton						4899			
								Use This	Effecitve Date 🗖 09	102010 🕎	Show Note	Approve	Reject
Coverage Comparision													
		Current	Inrollment						Requested C	hanges			
Benefit Description	Enrolled Plan	Option	Effective Date	Employee Amount	Employer Amount	Total Amount	Benefit Descriptio	on Enrolled Plan	Option	Effective Date	Employe Amount	e Employer Amount	Total Amount
Living Expenses	Single	T-FREE	12/31/2008	C	76.92	76.92	Living Expenses	Family	T-FREE 1	2/31/2008		0 92.31	92.31
			Т	otal 0	76.92	76.92				1	Fotal	0 92.31	92.31

Benefit/Deduction elections that have been submitted are available in the Open Enrollment Approval screen to be approved or rejected.

If the request is approved, the benefits/deductions will be elected for the employee and HR/Payroll will be updated. The Election By Employee and Election by Plans screens in HR should be updated, and the Employee Benefits Maintenance and Employee Deductions Maintenance screens in Payroll should be updated. If the request is rejected, it is removed from the Open Enrollment Approval screen and the employee will have to make more changes in Open Enrollment and then re-submit.

An email notification is sent to the employee's email address as specified on the Employee Profile when the request is approved or rejected.

. . .

Qualifying Event Approval – Screen

			Employee Qualifyin	g Events Approval		
Employee Number	Employee Name	Event	Effective Date	Status	Profile Confirmation Number	Dependent Confirmation Number
SS-WK-SAL46	Elizabeth Rivers	Marriage - Qual Event	09/20/2010	Submitted	265	
SS-WK-SAL40	Hazel Patton	Marriage - Qual Event	10/21/2010	Submitted	281	276
					Review Profile Change Rev	ew Dependent Change Notes Attachments Approve Reject
			Qualifyin	g Event		
Event Marria	ge - Qual Event				Effective Date 10212010	
Marrie Event Description	ye - Qualifying Event.					×

Qualifying Events that have been submitted are displayed in the Qualifying Events Approval screen for approval.

nployee Qualifying Events App Profile Confirmation Number Employee Numbe Employee Na Even Effective Date Status SS-WK-SAL46 Elizabeth Rivers Marriage - Qual Event 09/20/2010 Submitted 265 SS-WK-SAL40 Hazel Patton Marriage - Qual Event 10/21/2010 Submitted 281 http://wintest2006.cmic.ca:7779/cmicoc4jtest2006/5 _ 🗆 🗡 Close Personal information Personal information Review Profile Change Review Last Name[®] Patton Last Name Patton First Name Hazel First Name Hazel Middle Name Middle Name Date 10212010 Prefix Title Suffix to Name Prefix Title Suffix to Name Marital Status SSN (no space/hypl 794586012 Marital Status Single SSN (no space/hyph 794586012 Date of Birth 06131975 Date of Birth 06131975 Mailing Address Mailing Address Address Line 1 Address Line 1 Address Line 2 Address Line 2 Address Line 3 Address Line 3 ZIP ZIP 10001 Physical Address Physical Address Address Line 1 Address Line 1 Address Line 2 Address Line 2 Address Line 3 Address Line 3 ZIP ZIP City State III City State New York Country Country 1 🔻 Contact Contact Home Fax Home Phone (Home Fax Home Phone Work Phone Work Fax Work Phone Work Fax Cell Phone Pager Cell Phone Pager E-Mail Address E-Mail Address suzette.watson@cmic.ca

Select the Qualifying Event for the employee that will be approved.

The [**Review Profile Change**] button displays the Profile record associated with the Qualifying Event that was assigned when submitting the Qualifying Event.

					mployee Qualifyir	g Events Approval			
	Employee Number	Employee Name	Event	1	ffective Date	Status	Pr	ofile Confirmation Number	C
SS-WK-	SAL46	Elizabeth Rivers	Marriage - Qual Event	09/20/2	10	Submitted	265		
SS-WK-	SAL40	Hazel Patton	Marriage - Qual Event	10/21/2	10	Submitted	281		276
	//wintest2006.c	mic.ca:7779/cmicoc4jtest20	06/SsePersonalInfo/revie	wDependent.do?requ	estOras - Windov	s Internet Explore			
			Dependent R	equest					
							Close		
	Effective Date 0621201	10	Con	mment					
	First Name	Jacqueline	Last Name	Patton	Middle N	lame		Review Profile Change Review	Dependent Change
	Date Of Birth	01011995	SSN (no space/hyphen)	321212121				10212010	
	Relation	Child 💌	Priority	Highest 💌					
	Phone	(312) 394-0002	Alter Phone		Cell Pl	hone (312) 450-0111			
	Page	r	Fax		E-Mail Add	ress			
	Address Line 1	40 Plum Road							
	Address Line 2	2 Chicago							
	Address Line 3	8 Illinois							
	ZIF	60609							
	County	·	City						
	State	Illinois 🔺	Country	United States of Americ	a 🔻				
	First Name	Mike	Last Name	Patton	Middle N	lame			
	Date Of Birth	01011970	SSN (no space/hyphen)	465897444					
	Relation	Spouse 💌	Priority	Highest 💌					
	Phone	(312) 394-0002	Alter Phone		Cell Pl	hone (312) 454-2929			
	Pager	r	Fax		E-Mail Add	ress			
	Address Line 1	40 Plum Road							
	Address Line 2	2 Chicago							
	Address Line 3	3 Illinois							

The [**Review Dependent Change**] button displays the dependent record associated with the Qualifying Event that was assigned when submitting the Qualifying Event.

			Employ	e Qualifying	Events Approval					
Employee Number	Employee Name	Event	Effective	Date	Status	Profile Confirm	ation Number		Dep	endent C
SS-WK-SAL46	Elizabeth Rivers	Marriage - Qual Event	09/20/2010	\$	Submitted	265				
SS-WK-SAL40	Hazel Patton	Marriage - Qual Event	10/21/2010	\$	Submitted	281			276	
Event [®] Marriag	ge - Qual Event ge - Qual Event		Date 2010-11	4 Windows I Author 4 Hazel Patto	nternet Explorer	Note Ifying Event - Marriage for Haze	Add Clos	e Edit	v Dependent Change	Notes
Event Description										

The [Notes] button displays any notes that were submitted with the Qualifying Event. More notes may be added here.

				Emp	loyee Qualifyin	ng Events App	proval				
Employee Number	Employee Name	Event		Effec	tive Date	Statu	s	Profile C	Confirmation Number	De	pendent Confirmation Number
SS-WK-SAL46	Elizabeth Rivers	Marriage - Qual Event		09/20/2010		Submitted	265				
SS-WK-SAL40	Hazel Patton	Marriage - Qual Event		10/21/2010		Submitted	281			276	
SS-WK-SAL40	Hazel Patton ge - Qual Event ge - Qualifying Event.	Marriage - Qual Event	Phttp://winte	10/21/2010 st2006.cmic	.ca:7779/cmic Attachi Upload 11/04/2010	Submitted	281 I6/SseEmpQr Note	Action	Review Profile Change Revi	276 ew Dependent Change	Notes Attachments Ap
Event Description											

The [Attachments] button displays any attachments that were submitted with the Qualifying Event.

Welcome to CMIC Open Enrollment

Open Enrollment for Marriage - Qual Event is 10/21/2010 through 12/25/2010. During this period, you have the opportunity to make your 2010 benefit elections.

Hazel Patton Enrollmen	azel Patton Enrollment										
Status	Start Date	End Date	Days Left	D	escription	Action					
Pending	2010-10-21	2010-12-25	51	Marriage - Qual Event		Enroll Now					
Approved	2010-08-01	2010-12-31	57	General							
Pending	2011-01-01	2011-02-01	89	General							
Enrollment Links											
Add Dependent	Add Dependent										
Qualifying Event											
Report/Review Qualify	ving Event										
Dependent Enrollment											
Current Cost											
Employee Amount	\$107.69	Employ	/er Amount	\$353.84	Total Cost \$2	246.15					

Press the [**Approve**] button to approve. When the request is approved, the Qualifying Event will appear in the Welcome to CMIC Open Enrollment screen if the period range is current.

Press the [**Reject**] button to reject the request. When the request is rejected, the record is removed from the Approval screen and the employee will have to make the necessary changes and re-submit.

An email notification is sent to the employee's email address as specified on the Employee Profile when the request is approved or rejected.

Dependent Approval – Screen

				S	elect Em	ployees		
Employee Numb	per		Name	Search	Show	Advanced Search	Clear	ar
Employee No								Employee Name
SS-WK-HR20						Cameron Mason		
								Show Note Approve Reject
Dependent Enr	rollment							
Expand All	First Name	Last Name	Relation	Date of Birth				
8	Mason	Richard	Child	2000-06-05				
Description	F	lan Effectiv	e Date					
Dental	E	ICBS 2008-06	3-20 View Coverage					
Ξ.	Mason	Myrna	Child	2002-06-02				
Description	F	lan Effectiv	e Date					
Dental	E	CBS 2008-06	3-20 View Coverage					

Dependent requests that have been submitted will be displayed in the Dependent Approval screen for approval.

The approver may approve or reject the dependent request by pressing the [**Approve**] or [**Reject**] button. Dependents are also updated in HR (i.e. Employee Relatives).

An email notification is sent to the employee's email address as specified on the Employee Profile when the request is approved or rejected.

Self Service Control Setup - Screen

Employee Self Service				🔓 🗈 🍙 Logout
Carl Employee Self Service			Save Cancel]
Search Go				
Employee Self Service		Employee Self-S	Service Setup	
Personal information Payment Administration	Profile	Enable Workflow		
Corporate Learning	W4	Enable Workflow		
E Concentration	Contact	Enable Workflow		
	Skills	Auto Approval	Enable Workflow	
E Commence	Certificate/License	Auto Approval	Enable Workflow	
Request Approval	Education	Auto Approval	Enable Workflow	
Manager Change Request	Membership	Auto Approval	Enable Workflow	

This screen is used to enable/disable Approval Workflows for changes to an Employee's Personal Information, and to set whether or not changes to an Employee's Skills, Certificate/License, Education, and Membership information are to be automatically approved (Employee's Profile gets updated without approvals)

Employee Profile records will be updated once the requests are approved and the request will be displayed in the Auto Approved Request List screen with a Submit Status of "A". If the request has been submitted, but not automatically approved, it will appear in the Auto Approved Request List screen with a Submit Status of "S".

Open Enrollment Status – Log

Employee Self Servic	e						Show	Filter Send	To Spreadsheet E	Enter Query [🖌 🗈 🏠 Logout
Carter Contract Contr						Open Enro	llment				
Search	•	Transaction No	Employee No	Name	Status	Start Date	End Date	Description	Remaining Days	Effective Date	Qualifying Event
	•	1723	LG1-BW-HR5	Jane Austin	Approved	01/01/2013	12/31/2013	General	-1126	01/01/2013	
Employee Self Service		1762	TESTESS	Test Ess	Pending	01/01/2013	12/31/2013	General	-1126	01/01/2013	
Personal Information Payment Administration	I	1763	SWC-WK-SAL3	Suzette Watson	Approved	01/01/2013	12/31/2013	General	-1126	01/01/2013	
Corporate Learning		1783	LG1-BW-SAL23	Steve Nash	Pending	01/01/2013	12/31/2013	General	-1126	01/01/2013	
E Cruiting	F	1811	LG1-BW-SAL12	Grace Kelly	Approved	01/01/2013	12/31/2013	General	-1126	01/01/2013	
Corporate Information		1925	JCR TEST SAL	Test Salaried	Pending	01/01/2013	12/31/2013	General	-1126	01/01/2013	
H Security	F	1929	LG1-BW-HR25	Luis Caroll	Pending	01/01/2013	12/31/2013	General	-1126	01/01/2013	
Request Approval		2233	GL-WK-SAL1	Donnnie Warlberg	Approved	01/01/2013	12/31/2013	General	-1126	01/01/2013	
	F	2235	GL-WK-SAL1	Donnnie Warlberg	Approved	11/18/2013	08/13/2016	Child Birth	-170	11/18/2013	Child Birth
Manager Change Request		2308	GL-NEW2-SAL1	Barbara Scott	Pending	01/01/2013	12/31/2013	General	-1126	01/01/2013	
On Board Action	R	2662	GL-BW-SAL42	SAL42 GL-BW	Pending	01/01/2012	12/31/2014	General	-761	05/01/2014	
Open Enrollment Period Setup		2944	GL-WK-SAL123	GL-WK SAL23	Rejected	01/01/2012	12/31/2014	General	-761	05/01/2014	
Qualify Event Setup	т	otal (12 rows)									

The Open Enrollment Status log lists every request transaction related to benefit/deduction elections for employees, whether they are 'general' requests, or Qualifying Event requests. These transactions may be Pending, Submitted or Approved.

Qualifying Event Status - Log

Employee Self Servic	e							Show Fil	ter Send To	Spreadsheet	Enter	Query 🕻	🗈 🍙 Logout
Carter Contract Contr							Qualifyin	ig Event					
Search G	Event No	Employee No	Name	Event Code	Event Name	Event Date	Event Status Code	Event Status Description	OE Start Date	OE End Date	OE Status	OE Remaining Days	OE Status Description
Employee Self Service Personal Information	113	LG1-BW-SAL12	Grace Kelly	MARRIAGE	Marriage	03/20/2013	A	Approved	03/01/2013	11/25/2015		-432	
Payment Administration	113	LG1-BW-SAL12	Grace Kelly	MARRIAGE	Marriage	03/20/2013	A	Approved	03/01/2013	11/25/2015		-432	
Corporate Learning	113	LG1-BW-SAL12	Grace Kelly	MARRIAGE	Marriage	03/20/2013	A	Approved	03/01/2013	11/25/2015		-432	
Recruiting Corrected to formation	113	LG1-BW-SAL12	Grace Kelly	MARRIAGE	Marriage	03/20/2013	A	Approved	03/20/2013	12/14/2015		-413	
E Security	114	LG1-BW-SAL12	Grace Kelly	BIRHT	Child Birth	03/20/2013	A	Approved	03/20/2013	12/14/2015		-413	
E C Manager Self Service	119	LG1-BW-HR25	Luis Caroll	BIRHT	Child Birth	05/23/2013	A	Approved	05/23/2013	02/16/2016		-349	
Request Approval Auto Approved Request List	127	GL-WK-SAL1	Donnnie Warlberg	BIRHT	Child Birth	11/18/2013	A	Approved	11/18/2013	08/13/2016	A	-170	Approved
Manager Change Request	138	LG1-BW-HR5	Jane Austin	BIRHT	Child Birth	12/20/2013	A	Approved	12/20/2013	09/14/2016		-138	
On Board Action Open Enrolment Control Setup	141	LG1-BW-HR5	Jane Austin	MARRIAGE	Marriage	12/19/2013	A	Approved	12/19/2013	09/13/2016		-139	
Open Enrollment Period Setup	146	LG1-BW-HR5	Jane Austin	BIRHT	Child Birth	05/01/2014	A	Approved	05/01/2014	01/24/2017		-6	
Qualify Event Setup	149	LG1-BW-HR5	Jane Austin	BIRHT	Child Birth	06/01/2014	A	Approved	06/01/2014	02/24/2017		25	
- Open Enrollment Approval	159	LG1-BW-HR5	Jane Austin	BIRHT	Child Birth	06/03/2014	S	Submitted					
Qualifying Event Approval Dependent Approval	Total (12 rows)											

This log screen lists basic details about Qualifying Events, such as their status.

Dependent Enrollment Approval - Screen

This screen allows to Approve or Reject Benefit/Deduction elections for employee's dependents.

If the request is approved, the benefits/deductions will be elected for the employee's dependent and HR/Payroll will be updated. The Election By Employee and Election by Plans screens in HR should be updated, and the Employee Benefits Maintenance and Employee Deductions Maintenance screens in Payroll should be updated. If the request is rejected, it is removed from the Open Enrollment Approval screen and the employee will have to make more changes in Open Enrollment and then re-submit.

An email notification is sent to the employee's email address as specified on the Employee Profile when the request is approved or rejected.

Employee Address Change – Log

Employee Self S	Gervice					Sho	w Filter	Send	To Spreadsheet	Ent	er Query 🛛 🛛	🗈 🍙 Logo	out
Complexes Self Service			Employee Address Change										
Search	72 more rows are	available. Click here to retrieve all rows.											
Employee Self Service	Employee #			City Code	City Name	Prev City Code	Prev City Name	State Code		Prev State Code	Prev State Name	Work Locat	Î
Payment Administration Corporate Learning	CCQ-WK-HR1	Tony	Gables					NL	New foundland and Labrador	NL	New foundland and Labrador	QC	
Recruiting Corporate Information	CCQ-WK-HR1	Tony	Gables					NL	New foundland and Labrador	NL	New foundland and Labrador	NF	
E Security	CCQ-WK-SAL1	Jenny	Aniston					ON	Ontario	QC	Quebec	QC	
🖻 🤭 Manager Self Service	CLEVELANDEMP	Employee	Cleveland					OH	Ohio	ОН	Ohio	CLEV1	E
	DMCLEAN	Dallas	McLean					PA	Pennsylvania	PA	Pennsylvania	SNY	
Manager Change Request	EMP-04	04	EMP					NY	New York	NY	New York	NY STATE	
- Open Enrollment Control Set	EMP001	EMPLOYEE1	SHAWMUT					OH	Ohio	NY	New York	COLUMBUS	
Open Enrollment Period Setu Qualify Event Setup	GL-BW-HR13	HR13	GL-BW					NY	New York	L	Illinois	SNY	
Open Enrollment Approval	GL-BW-HR18	HR18	GL-BW					L	Illinois	L	Illinois	IN01	
Qualifying Event Approval	GL-BW-HR47	HR47	GL-BW					WI	Wisconsin	WI	Wisconsin	CHIC	
Self Service Control Setup	GL-BW-HR84	HR84	GL-BW					L	Illinois	L	Illinois	100013224	
Open Enrollment Status	GL-BW-HR84	HR84	GL-BW					L	Illinois	L	Illinois	CHIC	
Qualifying Event Status Dependent Enrollment Appro	GL-BW-SAL1	Eden	Gendel					он	Ohio	NY	New York	LONGCODEWC	
Employee Address Change	GL-BW-SAL1	Eden	Gendel					NY	New York	NY	New York	LONGCODEWC	
	GL-BW-SAL11	SAL11	GL-BW					KY	Kentucky	PA	Pennsylvania	CHIC	

This log screen lists Employee Address Change records and basic details about them.

Security

User Maintenance

For details about this screen, please refer to the System Data user guide.

Role Maintenance (JSP Security Roles)

For details about this screen, please refer to the Project Management user guide.

User Access



This screen is used to assign security roles, programs, menu items and privileges to User IDs.

ESS Setup

ESS Administrator Setup

The following steps are required to set up an Enterprise User as an ESS Administrator.

Step 1: JSP Security Role Assignment

Employee Self Service					
Employee Self Service		Securi	ty Role	25	
arch Go					
Construct Colf Construct	Role Code	Role Name	Admin	Actions	Assign 🔺
Employee Self Service Engloyee Self Service	CXCSUBS	CXC's Subcontractor	N	🛯 🗙	Choose your action[
Payment Administration	CXROLE	Cindy's Role	Y	🖾 🗙	Choose your action[
E Corporate Learning	DM_MASTER	DM Master	Y	😒 🗙	Choose your action[
E Cruiting	E-MASTER	E-time Role Master	Y	🛯 🗙	Choose your action
Corporate Information Security	ESS-ADMIN	ESS Administrator - Full Acces	Y	🕅 🗙	Choose your action
User Maintenance	ESSBASIC	ESS Basic	N	X	Choose your action Assign Users
Role Maintenance	ETIME-ENTR	ETime Entry(Employee)	N	😒 🗙	Assign Programs
Manager Self Service	EVERYTHING	Everything Admin	Y	🖄 🗙	Assign Menu Items
_	EXTUSER1	External User Only - Do NOT Mo	N	X 🗹	Assign Field Security
	FAR_MASTER	HR Master (JSP)	Υ	🕅 🗙	Choose your action[
	HCM_ADMIN	HR Administrator	N	🛯 🗙	Choose your action[
	HRMARJROLE	MARJ HRADMIN	Y	🛯 🗙	Choose your action[
	IHCOLPRJ	HCOLLP	Y	X 🖉	Choose your action

Sample of JSP Role Maintenance screen, in PM JSP module.

JSP Security Roles are used to grant privileges for JSP based screens, such as those of the ESS module. The relevant JSP Security Roles maintenance screen is found in the ESS module, as shown above (standard Treeview path: *ESS* > *Security* > *Role Maintenance*).

For the ESS system, JSP Security Roles are used to set which of its screens are available to users assigned them, for both ESS Administrators and Employees.

For details about setting up JSP Security Roles for the ESS system, please refer to the *JSP Security Roles Setup* subsection under the *ESS Setup* section of this guide.

Employees & JSP Role (ESSBASIC Role)

For Employees (not ESS Admins), the standard **ESSBASIC** JSP Security Role that comes with the system is used to set up which screens are available to them. This role does not need to be manually assigned to Employees, as the system automatically does that when they self-register.

ESS Administrators & JSP Roles

For ESS Administrators, one or more new JSP Security Roles need to be created and set up for them, to set which **Manager Self Service** screens in the ESS module are to be available to them. If all administrators are to have the same privileges, then only one role needs to be created for all of them, otherwise, a roll needs to be created for each variation of ESS administration duties.

The appropriate roles are assigned to ESS Administrators manually, using the **Assign Users** action of the JSP Role Maintenance screen, as shown in the previous screenshot.

Step 2: HR Security Role Assignment

Hr Role Mainta	nence		₽ ⊑ ₼
Salary Planning			Add
Salary History		HR Roles	
Salary Surveys	Code	Description	Delete
🕀 🎦 User-Defined Logs	EMP-V	Employee (View)	×
	EMP-VE	Employee (View/Edit)	×
File Maintenance	APPR	Approver	×
Application Questions	LG1	Approver	×
Application Status	ESS-MNGER	ESS Manager	x
- Area of Interest	FARNAZ	farnazv10x	×
Applicant Rating Attendee Status			

Sample of HR Role Maintenance screen in HCM module; standard Treeview path: HCM > File Maintenance > HR Role Maintenance.

HR Security Roles (HR Roles for short) are only required for ESS Administrators, and they are used to set up Approval security for them, to set which approval operations for Change Requests (e.g. requests to change dependent information, or to change benefit/deduction plan enrollments) they can perform.

For each type of Change Request, ESS Administrators can be granted **View**, **Approve** and **Reject** privileges. For Change Requests for Profile Information, ESS Admins can be granted **Edit** privileges to change data in the Change Requests.

For details about setting up HR Security Roles, please refer to the *HR Security Roles* subsection under the *ESS Setup* section of this guide.

Project Management				Show Filter Send To Spreadsheet Enter Query	[2 🗈 🍙
🕸 🗉 🗉 🛛 Project Management Menu			Partners		
Search Go	60389 more rows are available. C	ick here to retri	eve all rows.		
	Code	Туре		Name	^
Project: 12345 - Contract Forecasting (12345	AOD	P	Abbey Over Head Doors Inc		
Communication Management	APACORP	P	APA Corporation		
Occument Management	APM	P	APM		
Subcontractor Prequalinication	APOTEX	P	Apotex Pharmaceuticals		
E Dudget & Cost Management	APPFINIS	P	Applied Finish Systems		
Site Management Site Management	▲ APR	С	April Test Company		
E C Reports	APS	P	All Power System		
H- User-Defined Logs	▲ ARC	P	American Reprographics Company		
E Courity	ARCHCONS	P	Architectural Consulting Inc		
Partners	ARKELL	P	Arkell Construction		
Contacts	ARTEC	P	Artec Tools		
Convert Partners and Contacts	▲ ASD1	P	ASD123		
Change User LDAP Server	ASDA	P	Asda Construction		
	ASDFA	P	asdfa		
User Access	▲ ASR	Р	ASR Architectural Design Group		
Project Roles	▲ AST	Р	AST SYSTEMS		
PM-Forms	ASTEELCO	P	Andy's Steel Company		
- Pivel Office	1 HOTELEOO	1	Andy a actor company		

Sample of Partners screen in PM JSP module.

HR Roles are assigned to ESS Administrators via their Contact records. To assign an HR Role to a Contact record, the Partners screen in the PM JSP module must be used (shown above), as only it has the **HR Role** field required to assign an HR Role to a Contact, as shown in the next screenshot.

In the Partners screen, use the screen's filter, framed above, to search for the Company to which the administrator-to-be belongs, then click the link under the **Name** column to view that Company's Contact records.

Next, search for the administrator-to-be, and click the Edit icon under the **Action** column. Next, select the relevant HR Role via the **HR Role** field on the **System Contact Info** tab, as shown below.

XP Con	ntact Mainten	ance					Apply to	Projects Save Cancel Delete 🏾	1 6
Budget & Co	ract	System Contact Info		E-mail No	tifications	E	xternal Software Login	5	^
- 🔁 Subcontr - 🕒 Subcontr - 📄 CMiC BII	rract Change Orde rractor SOV IM 360	Company Name	CMiC Test Construction Comp	pany	Contact Code	MR			
- Detential	I Change Items	First Name	Mike		Last Name	Rock			
Change	Transmittal	E-Mail	mike.rock@company.com		Initial			Photo	
- Request	For Payment	Title			Suffix			is not	
Complian	nce Status Log			Additional PM				on file	
Cost Stat	atus Query	PM Role		Roles	Position(SB)			Lude data Tanana ata	_
- Dudget S	Status Query (Rev	HR Role	ESS Manager	1				Upload Photo Remove Pho	.0
Cost Stat	atus Query (Categ	Primary Contact			Contact Active	\checkmark			
PCI Proje	jection	Collab Liser			Bid Contact				
Contract	t Forecasting with			6 d d d					
PCI Mark	kup Rules	Address Code		Aud	1638				
E C Site Manage	ement	Address Code							
Daily Rep	port	Business Address	Mike Rock 4850 Keele Street Ground Flo	oor	,	^			
Punchlist	its arts Dissettives		Orlando FL 32410			~			
Notices	JIK Directives		05		Contact Inform	ation			
- 🔁 Weekly C	Check List	Work Direct	452 545 2542		Desformed Content Mathad	Mail			
QC Inspe	ection and Testing	work Phone	400-040-0040		Preferred Contact Method	Mali			
Checklist Enorts	its	Home Phone			2nd E-mail (SB)				
E C User-Define	d Logs	Mobile	655-889-4716		Pager				
Customiz	zed Issues Log	Main Fax			Web Page				
SBDOCS	s	2nd Fay			Other Info				
RFi Log	.0								
- 🦲 Daily Jou	urnal Costs	Use Alternate Fax Method	L Fax Prefix		Fax Suffix				
- SB Cost	Status Query (Ca				User Informat	tion			
VBDefine	eLog	User ID	NO USER						

Step 3: Grant Access to ESS

The way in which ESS Administrators and Employees are granted access to the ESS system is the same. For details, please refer to the *Step 1: Grant Access to ESS* subsection under the *ESS Employee Setup* section.

Step 4: ESS Self-Registration

The way in which ESS Administrators and Employees self-register is the same. For details, please refer to the *Step 2: ESS Self-Registration* subsection under the *ESS Employee Setup* section.

ESS Employee Setup

For Employees, the first two steps involved to set up ESS Administrators are not required. The first step is not required, as the JSP Security Role relevant to Employees (**ESSBASIC**) is automatically assigned to them when they self-register. The second step is also not required, as HR Security Roles are only relevant to ESS Administrators.

ESSBASIC – JSP Security Role for Employees

For Employees, the standard **ESSBASIC** JSP Security Role that comes with the system is used to set up which screens are available to them. This role needs to be configured, however, it does not need to be manually assigned to users, as the system automatically does that when Employees self-register.

For details about setting up JSP Security Roles for the ESS system, please refer to the JSP Security Roles Setup subsection.

PLOYEE DETAIL											
earch 🔄 Insert	🕾 Delete 🛛 🖕 Previ	ous 🛋 1	vext 🙉 V	Vorkflows	-	eport Options	🗄 Import 🔍 EC	M Documents	Suser Extens	ions	
	4				1 0.		e		0.0		
nployee PS4434		Sandes	sk Padma								Copy En
rsonal Company	Rates/Salary	Address	Tax	HR Info	нсм	Exclude Other Ho	urs Security	Project History	User Defin	ed Fields	
* Last Name	Sandesk	Address	Tux			* First Name	Padma	riojectinistory	ober benn	Initial	
Prefix						Suffix				Alias	
* SSN /SIN no.	456789123			-		Туре	Hourly		-	* Full/Part	Full-Time
* Status	A Active			_						1	
* Work Status	Working			-			Allow Accrue	d Leave			
* FLSA Type	Non-Exempt			-							
21	Unionized				Uni	on Membership Date		四			Eligible for
Union											
Union Mem. No.											
Position Desc.											
Place of Birth											
* Date of Birth	22/May/1981	范。									
* Hire Date	03/Jan/2017	26				Seniority Date		陸。		Work Days/Year	
Termination Date		弦				Next Review Date				Hours/Year	
Re Hire Date					A	Adjusted Service Date	03/Jan/2017			Service/Years	
Date Deceased						* Primary Employee	PS4434			Valid	Y
	License/Cert.										
	Skills										
						m					

Part I: Ensure Employee Profile Has Relevant Details

Using the Employee Profile screen, on the **Personal** tab, shown above, ensure that following information is entered:

- Employee Number
- SSN/SIN
- Date of Birth

This information is required for the self-registration process.

NOTE: If information is missing, the Employee History screen (program: PYEMPHIST) is used to enter it.

EMPLOYEE PROFILE	///////////////////////////////////////				Table Mode	🂾 Save 🕞 Exit	۵
EMPLOYEE DETAIL							
👼 Search 🛛 🚓 Insert 🚓 Delete 🛛 🖕 Previou	s 📫 Next 💩 Workflows 💌	🔒 Report Options 👻 🔜 I	mport 🛛 🖓 ECM D	ocuments 🛛 👻 🖧	User Extensions		
* Employee PS4434	Sandesk Padma						Copy Employ
<							
Personal Company Rates/Salary	ddress Tax HR Info HC	CM Exclude Other Hours	Security	Project History	User Defined Field	s	
* Geo Code From Mailing Address	•						
MAILING ADDRESS		~	PHYSICAL ADDRE	55			
* Foreign Address				🔲 * Foreign Add	iress		
77 Easy St.							
Chicago							
* Zip Code 60624			Zip Code				
* Country Code US	 United States of America 		Country Code				
* State/Province IL	▲ Illinois		State/Province		A		
County/Region							
City/Town							
Home Phone		Work Phone					
Home Fax		Work Fax					
Cell Phone		Work Cell Phone					
Email Address PS@CCC.com		Work Email Address					
Pager							
Latitude		Business Partner Code			Cre	ate BP/Vendor	
Longitude		AP EFT Distribution Method	Email		-		
Country US							

On the **Address** tab, ensure that the **Email Address** field is entered. The e-mail address will be used to send the Employee an e-mail to ask them to self-register.

хP	Human Capital Mana	age	ment												
	Salary Increase Jser-Defined Logs	^	CM/C Em	ploye	e Self S	ervice Ma	aintenan	ice						Clear Sea	arch Update
	ile Maintenance							Emp	oyee Self Service Mai	intenance					
T 🗄 🕻	Employee Console Maintenance		Employee Numb	er				First Name				Last	Name		
	Application Questions		Englands Top	- Calant [Deur	and Communic				Deverall Dever			
	Application Status		Employee ryp	e -select-	*]	1.00	Pdy	roir company		1 and		Payroli Depa	remenc		
	Area of Interest		Pay Grou	-th		A		Pay Run					Union		
	Applicant Rating		Trac	le											
	Certifications and Licenses		Total Records - 292												
	Class Status							<< Prev	151 - 200 of 292 🗸	Next >> ()					
	Course Types		6 J H											(
	Corporate Performance Standards		Employee No	First Name	Last Name V	Manager No	Manager Name	Senior Manager No	Senior Manager Name	Company Code	Compar	Υ Υ	Usar ID	Access To Self Service	Select Al
	Degrees		PYMJ-WK-004	Laura H	Lopez					PYMJ	MJ PAYROLL COMP	ANY			
	Education		SWC-SAL1	Mona	Liza					SWC	SWC Construction C	ompany			
	Geographical Area		CCC_WK_HR1	Isabella	Lincoln	SWC-WK-HR6	Joanna Judd	SWCJWK-SAL11	Felix Anderson	000	CMIC Test Construct	ion Company		7	
	Hiring Actions		0001110.007	David	Les	0110111110	Countra Cooo	ono monen	100074000000	DVAL		ANY ANY		•	
	HR Recruiters		PYMJ-HR-027	David	Lee					PYMJ	MJ PAYROLL COMP	ANY			
🖸	HR Regions		SWC-WK-SAL15	George	Laker					SWC	SWC Construction C	ompany			
	Membership Type		JAK001	Jodi	Knickle					ZZ	CMiC Construction In	ic.	Not Registered	✓	
	Menu Maintenance		ZZ-WK-SAL1	Daniel	King					ZZ	CMiC Construction In	ic.			
	Dhysical Demands		7C EMD2	Karan	Kindness					70	Canadian 7C Compa				
	Salary Grade	11	20-244 0	-	Terror to bo					20	Condoinin 20 Compe				
🖸	Skills		CA-WK-KILBY	Bob	Kilby					ALCAD	AL Canadian Compa	ny			
	Trainers		SWC-WK-HR12	Marie	Kendle					SWC	SWC Construction C	ompany			
	Training Teams		SWC-WK-HR6	Joanna	Judd	SWC-WK-SAL11	Felix Anderson	SWC-WK-SAL3	Suzette Watson	SWC	SWC Construction C	ompany			
	Trainer Evaluation Questions		77-JOHNJOYCE	John	Joyce					77	CMiC Construction In	ic.	Not Registered		
	User-Defined Log Types		DVM LIMK 10	Mire H	loch					DVM			-		
	User-Defined Logs		P T MO-VIN-TO	101211	JUSH					e mo	MO PATROLE COMP	20101			
	Work Environment	1	SWC-WK-HR16	Sarah	Jones					SWC	SWC Construction C	ompany			
-0	Log Builder	1	SWC-WK-HR23	Glovskey	Jonathan					SWC	SWC Construction C	ompany			
	Default Filters		QA-WK-HR1	Abraham	Jonathan					SWC	SWC Construction C	ompany			
	Employee Maintenance		CCC-WK-HR3	Abraham	John					000	CMiC Test Construct	ion Company			
L.	HR Administration Action Maintenance		ALT MAK JECCUID	Davia	1					41.7	Andréa Company Al				
	HR On Board Action		ALT-WK-JESSUP	Dave	Jessup					ALT	Andy's Company AL				
	HR Role Maintenance		22256	Brenda	Jason					PYMJ	MJ PAYROLL COMP	ANY	Not Registered	✓	
	Prompt Maintenance		SWK-WK-HR21	Melinda	Jackson					SWC	SWC Construction C	ompany	Not Registered	✓	
	HR Documents Employee Request (11)		SWC-WK-HR44	Tom	Jackson					SWC	SWC Construction C	ompany			
	Employee Self-Service Control		JD-SAL-INGER	SAL	INGER					JDUS	JD US TEST Compa	ny	Not Registered	V	

Part II: Grant ESS Access & Send Self-Registration E-Mail

Sample of Employee Self Service Maintenance screen in Human Capital Management module

In the HCM module, launch the Employee Self Service Maintenance screen, shown above, via the **Employee Maintenance** link in the HCM module's Treeview. For details about launching the HCM module, please refer to the *Launching HCM Module* subsection under the *Appendix* of this user guide.

In the Employee Self Service Maintenance screen, search for the Employee, click their Access To Self Service checkbox, then click the [Update] button on the top-right of the screen.

Note that rows of Employees granted access to the ESS module have a purple-blue background.

After clicking the [**Update**] button, an e-mail will be sent to the Employee, asking him/her to register for the Employee Self Service system.

Step 2: ESS Self-Registration

🔓 Reply l 👰	Reply All 🕒 Forward 🧔 IM
	Mon 1/9/17 12:50 PM
	ravi.venkatachalam@cmic.ca
	Your Access to CMIC Employee Self-Service
To Mike Fern	iandes
Dear Padma You have be <u>http://test4</u> Sincerely, The CMIC E	Sandesk, een granted access to CMIC Employee Self-Service. Please click the following link to register yourself. <u>v10.cmic.ca:7785/cmictestv10x/SdMenu/essRegisterPage.do</u> Employee Self-Service Team

After an Employee is granted access to the ESS system, an e-mail is sent to them, as shown above, asking them to click the provided link to register for the ESS system.

Employee Self Se	ervice	
	Verify Empl	loyee Information
	Verify Empl	PS4434
	Verify Empl Employee Number Date of Birth	Information PS4434 05-22-1981
	Verify Empl Employee Number Date of Birth SSN (no space/hyphen)	oyee Information PS4434 05-22-1981 456789123
	Verify Empl Employee Number Date of Birth SSN (no space/hyphen)	Image: Normation PS4434 05-22-1981 456789123 Next

Clicking the provided link launches the following ESS verification screen via the user's default browser. To register for the ESS system, the user enters their **Employee Number**, **Date of Birth** and **SSN** number, and clicks the [**Next**] button.

NOTE: If you are testing this functionality, after you granted access to the ESS system for an Employee, to test the Employee's registration, you must clear your browser's cache. This is necessary since your login credentials are saved by your browser, and they will be automatically used by the ESS Sing-In screen.



After clicking [**Next**], the following message is displayed, telling the Employee that they are registered for Employee Self Service. The message also contains their existing Enterprise User ID, which is used to log into the ESS system, along with their existing password for Enterprise.

Also, an e-mail will be sent to them, providing a URL link to the ESS Sign In screen, as shown below. The provided URL can be added to the user's browser's Favorites/Bookmarks for easy access.



Employee Self Service	
Not registered yet? Click here to register for employee self service.	
Sign In Sign In Enter your Single Sign-On user name and password to sign in.	OK Cancel
User Name Password Forgot Password	
	OK Cancel
Unauthorized use of this site is prohibited and may subject you to civil and criminal prosecution. Copyright © 1999, 2008 Oracle. All rights reserved.	

Clicking the URL launches the following ESS Sign-In screen:

JSP Security Roles Setup

Employee Self Service					
Employee Self Service		Secur	ity Role	5	
rdh Go					
	Role Code	Role Name	Admin	Actions	Assign
Personal Information	*ALL*	*ALL*			Choose your action
Payment Administration	ALMASTER	Andy Role	Y	🖾 🗙	Choose your action[
Corporate Learning	AMICHAEL	AMICHAEL	N	🖾 🗙	Choose your action
Recruiting	BALRAJS	Balraj S Role	Y	🛯 🗙	Choose your action
Corporate Information	CCCMASTER	CCC Master Role	Y	🖾 🗙	Choose your action
User Maintenance	CHECKPRIV	test	N	🛯 🗙	Choose your action
Role Maintenance	COLLAB	JDCollab	N	🛯 🗙	Choose your action
User Access	CXCSUBS	CXC's Subcontractor	N	🛯 🗙	Choose your action
Manager Self Service	CXROLE	Cindy's Role	Y	😒 🗙	Choose your action
	DM_MASTER	DM Master	Y	🛯 🗙	Choose your action
	E-MASTER	E-time Role Master	Y	🛯 🗙	Choose your action
	ESS-ADMIN	ESS Administrator - Full Acces	Y	🖄 🗙	Choose your action[
	ESSBASIC	ESS Basic	N	🛯 🗙	Choose your action
	ETIME-ENTR	ETime Entry(Employee)	N	X	Choose your action

Sample of JSP Role Maintenance screen in ESS module, which is the only JSP Role Maintenance screen with settings relevant to the ESS module (i.e., JSP Role Maintenance screens in other JSP modules <u>cannot</u> be used).

JSP Security Roles are used to grant privileges for JSP based screens. For the ESS module, which is JSP based, JSP Security Roles are used to set which screens are available to users, for both ESS Administrators and Employees.

In the JSP Security Roles screen of the <u>ESS module</u>, the **Assign Menu Items** action, framed below, is used to set which screens are available to ESS users:

DM_MASTER	DM Master	Y	S3 🗙	Choose your action
E-MASTER	E-time Role Master	Y	🛯 🗙	Choose your action 💌
ESS-ADMIN	ESS Administrator - Full Acces	Y	S 🗙	Choose your action 💌
ESSBASIC	ESS Basic	N	🛯 🗙	Choose your action
ETIME-ENTR	ETime Entry(Employee)	Ν	S 🗙	Assign Users
EVERYTHING	Everything Admin	Y	🖾 🗙	Assign Programs
EXTUSER1	External User Only - Do NOT Mo	Ν	🛯 🗙	Assign Menu Items
FAR_MASTER	HR Master (JSP)	Y	🖾 🗙	Assign Privileges
HCM_ADMIN	HR Administrator	Ν	🛯 🗙	Assign Field Security
HRMARJROLE	MARJ HRADMIN	Y	Si 🗙	Choose your action 👻

To set up JSP Security Roles for the ESS module, the JSP Security Roles maintenance screen in the <u>ESS</u> module must be used, as only it has settings for the ESS module.

For Employees, the standard **ESSBASIC** Security Role that comes with the system is used to set up which screens are available to them. And when an Employee self-registers for the ESS module, the **ESSBASIC** role is automatically assigned to the Employee.

For ESS Administrators, one or more new JSP Security Roles need to be created and set up for them, to set which **Manager Self Service** screens in the ESS module are to be available to them. If all administrators are to have the same privileges, only one role needs to be created for them all, otherwise, a role will need to be created for each variation of privileges.

Assign Menu Items

хP	Employee Self Service					12 🗈	n Log	out		
\$⊡±	Employee Self Service	Add/Remove menu items from the ESSBASIC Role								
Search	Go			Select All	Unselect All	Update	Back			
			Menu Item	Granted						
🖃 🦳 Em	ployee Self Service		Personal Information	V						
	Profile Information		Profile Information							
	HR Information		HR Information							
	W-4 Information		W-4 Information							
	Emergency Contacts		Td1 Information							
	Skills		Emergency/Contacts							
	Certification and Licenses		Chille							
	Degrees		Skiis							
	Interim Evaluation		Certification and Licenses							
	Annual Evalution		Degrees	V						
	Discipline History		Memberships							
	Payment Administration		Interim Evaluation	V						
	Request and Review Vacation Balance		Annual Evalution							
	Pay Stub Printing		Discipline History	V				=		
	Direct Deposit Accounts		Payment Administration					-		
	Year End Summary		Open Enrollment	V						
	Class Enrollment		Request and Review Vacation Balances							
	Training Nomination		Pay Stub Printing							
	Training Request		Direct Deposit Accounts							
	Enter Requisition		Man Ford Ourseau	V						
	Review Requisition Activity		Year End Summary	V						
	Review Applicants		Corporate Learning							
	Applicant Self Service		Class Enrollment	v						
	Forms Request		Training Nomination							
E 🔁	Security		Training Request	\checkmark						
	User Maintenance		Recruiting							
	User Access		Enter Requisition	V						
E 🔁	Manager Self Service		Review Requisition Activity							
	Request Approval		Review Applicants	V						
	Auto Approved Request List		Applicant Self Service							
	On Board Action		Corporate Information					-		
-	Open Enrollment Control Setup		Forms Request							
	Open Enrollment Period Setup		Security							
	Quality Event Setup		User Maintenance							
	Qualifying Event Approval		User maintenance	V						
	Dependent Approval									
	Self Service Control Setup		User Access							
	Qualifying Event Status	Administrators only	Manager Self Service							
	Dependent Enrollment Approval	Administrators only	Request Approval							
	Employee Address Change		Auto Approved Request List							
4	TIT b		Manager Change Request					L		

Shown above is a sample of the **Assign Programs** sub-screen. The screen has checkboxes for each screen in the ESS module, to set which screens are available to users assigned the JSP Security Role.

HR Security Roles Setup

Hr Role Mainta	nence		[∕ I ∩					
Salary Planning			Add					
Salary History	HR Roles							
Salary Surveys	Code	Description	Delete					
🗄 🦳 User-Defined Logs	EMP-V	Employee (View)	×					
	EMP-VE	Employee (View/Edit)	×					
E C File Maintenance	APPR	Approver	×					
Application Questions	LG1	Approver	×					
Application Status								
Area of Interest								
Applicant Rating								

Sample of HR Role Maintenance screen; standard Treeview path: HCM > File Maintenance > HR Role Maintenance.

Overview – HR Security Roles Setup

HR Security Roles (HR Roles for short) are created and used to grant approval privileges for ESS Administrators, to set what Change Requests (e.g. requests to change dependent information, or benefit/deduction enrollments) ESS Administrators are allowed to approve.

HR Roles are assigned to ESS Administrators via their Contact records, using the Partners screen in the PM JSP module (Partners screen must be used, as only it has the **HR Role** field required to assign an HR Role to a Contact record). For details, refer to the following subsection: *Step 1: HR Security Role Assignment*.

Create HR Security Role for ESS Administrators

To create an HR Security Role for ESS Administrators, click the [Add] button on the HR Roles Maintenance screen, framed in the previous screenshot.

In the next screen, shown below, use the **Code** field to enter a code for the HR Role, and the **Description** field to enter its description:

хP	Hr Role Maintanence	e ////////////////////////////////////						2 🗈 🍙
\$ E E	HCM Manager 🔶							Save Cancel
Search	HR Role Maintenance							
bearen		Code ESS-ADMINF		Description ESS A	dministrator - Full			
🖃 🦳 HC	M Manager							
•	Position Control	Employee Profile			Fmpl	ovee Direct Deposit		
	Hiring Requisitions	Employee Vacation Balance			Employed	ovee Pay Stub		
± 🛄	Workforce Planning	Chiployee vacadon balance						(R = 1 + 1 = 1)
÷ 🗖	Training	Object (M Select All Objects)	View (🖬	Select All)	Edit (M Select All)	Reject (🖬 Select All)	Approv	e (🖬 Select All)
Ē 🔁	Performance Management	Profile				I		
😐 🦲	Compensation Management	Emergency Contact	1			 Image: A set of the set of the	-	
	User-Defined Logs	Direct Deposit						
	File Maintenance					-		
±.	Application Questions	Skills	•				•	
	Application Status	C Education	S		•	*		
	Area of Interest	Membership					✓	
	Applicant Rating	Dependent	~		√	×		
	Attendee Status	Vacation						
	Certifications and Licenses					-		
	Class Status	© W4	•				•	
	Course Types	Certificate/License			✓	•		
	Degrees	HR Roles						
	Education	Code			Descrip	tion		Delete
-	Frequency Status	DA		Database Administrato	r			×
-	Geographical Area	LG1		Approver				X
-	Hiring Actions	SMI-APP1		SMI Approver				×
	HR Recruitere							
Next, check the employee information for which the ESS Administrators assigned this HR Role will be able to perform approval operations. Click [Save] when finished.

NOTE: Currently the **Employee Profile**, **Employee Vacation Balance**, **Employee Direct Deposit**, and **Employee Pay Stub** checkboxes along the top of the screen are not used.

Employee Self-Service Control

Human Capital Management	
¢ ि ⊕ HCM Manager ^ Search GG	Save
E Desilies Control	Employee Self-Service Setup
Ostion Control	Profile 🗵 Enable Workflow
Applicant Management	W4 VEnable Workflow
Workforce Planning	Contact 🕼 Enable Workflow
H- Performance Management	Skills 🖉 Auto Approval 🔲 Enable Workflow
Compensation Management	Certificate/License V Auto Approval
User-Defined Logs	Education V Auto Approval
Grand Stress Stres	Membership V Auto Approval
Application Questions	

Sample of Employee Self-Service Control screen; standard Treeview path: HCM > File Maintenance > Employee Self-Service Control.

This screen is used to enable/disable Approval Workflows for changes to an Employee's Personal Information, and to set whether or not changes to an Employee's Skills, Certificate/License, Education, and Membership information are to be automatically approved (Employee's Profile gets updated without approvals).

NOTE: These settings are also available in the Self Service Control Setup screen of the ESS system (**ESS** > **Manager Self Service** > **Self Service Control Setup**).

Instructions Maintenance (Prompt Maintenance)

хP	Employee Self Service			Instructions	display area	🖌 🗈 🏠 Logout
\$⊡⊞	Employee Self Service	Transaction No	Effective Date	Comments	T PREV NEXT 190 - 2016-1	1-25(Submitted) 🔹 📤
Search	Go	190	2016-11-25			
⊡- <mark>))</mark> Emp ⊡-)) P	loyee Self Service ersonal Information	Instructions: Make changes to the	employee Profile	•	, ,	
	Profile Information	Request for change of employee profile				
	W-4 Information	Effective Date 25/Nov/2016 Comment				
	Emergency Contacts Skills	Personal information				
	Certification and Licenses Degrees	Last Name Ferna	andes	First Name Mike	Middle Name	
	Memberships	Prefix Title	Su	ffix to Name		
-0	Annual Evalution	Date of Birth 12/J	ul/1977 Ma	arital Status Single 🔻	SSN (no space/hyphen) 988543765	

Sample of Instructions display area at top of ESS screens.

The instructions displayed in the Instructions (prompts) area of ESS screens, shown above, can be customized.

To customize the Instructions, use the Prompt Maintenance screen in the HCM module (standard Treeview path: *HCM > File Maintenance > Prompt Maintenance*).

HCM Manager 🛕		Message Maintenance			
	Required fields are indicated with a blue triangle (1)				_
	Message Key hr_ess% A Reference	Key Message User Project Program Select Program Locale en	Add	Cance	Que
Manager	Message Key B	eference Key Messane	User Project	Program Log	cale
firing Requisitions	Hr Ess Certlic Instructions	How to make a chance request for certificates/icenses		en	1
Applicant Management	Hr Ess Direct Deposit Instructions	How to make a change request for direct deposit		en	1
Vorkforce Planning	Hr Ess Disciplinary Action Acknowledgement	By signing this notice. I am acknowledging that I have been counseled about my inappropriate conduct and informed of consequences if improvements are not made.		en	
raining	Hr. Ess. Education. Instructions	How In make a change request for education		en	
errormance Management	Hr Ess Emergency Contact Instructions	How to make a change request for exerciser		en	
ser-Defined Logs	Hr Ess Instructions	Instructions		e0.	
le Maintenance	Hr Ess Login Fail	Employee number/nin code is not correct or you are not a registered used		en	
Employee Console Mainte	Hr Ess Login Pin Expire	Zinjest version die se chance version for all net a registerica dos.		e0.	
Application Questions	Hr Ess Login Server Error	Lonin failed due to internet errord		en	
Area of Interest	Hr Ess Login Temp Pin	Zogen nako de en informa de reletiono. Vour DNI la temporary nako en en vour DNI		e0	
Applicant Rating	Hr Fas Login Temp Pin Expire	Your temporary DBI has exvised in base raiser		en	
Attendee Status	Hr Fee Membership Instructions	How to make a change sequent for memberships		60	
Class Status	Hr Ess Open Enrolment Title	<pre>shship=fontsize="#cc3333">Welcome to CMIC Oneo Enrollments/fonts-/his-/his-</pre>		en	
Course Types	Hr Fee Din Change Fron	Service and the international and the international of an end of the international of the int		-	
Corporate Performance S =	Hr Ess Pin Change Server Error	Failed to use PN due to server error		en	
Degrees	Hr Ess Pin Change Success	Your Pill is under successfully please ion using the new PIM/vald until (03)		en	
Education Frequency Status	Hr Ess Pin Email	Your temporare Brick (0) if is valid units (1) Your temporare DN is (0) if is valid units (1)		en	
Geographical Area	Hr Ess Pin Email Subject	Tennorary Differentiation and English		en	
Hiring Actions	Hr Ess Pin Reset Email	Your Bit is reset to (0) it is valid until (1)		e0.	
HR Recruiters	Hr Ess Pin Reset Email Subject	Tennorary Difference self-service		e0.	
HR Regions Membership Type	Hr Ess Pin Reset Error	Company of the company of the information you provided is not correct or you are not a registered user		en	
Menu Maintenance	Hr Ess Pin Reset Server Error	Earlief to reset vuir PN die to server error		e0	
Organization Type	Hr Fas Pin Reset Success	Value to took you have a construction of the original set to your registered email		en	
Physical Demands	Hr Fee Profile Instructions	Make channes to the emission of the file of the second state.		e0	
Salary Grade Skille	Hr Fee Denister Fail	Cannot reading to the employee in the employee		en	
Trainers	Hr Fee Denister Server Error	Danistrating failed due international region of the term of term o		-	
Training Teams	Hr Fee Denieter Succese	Registration rates due to a reference. Denistration additional environment All has been resister and eart to voir renistared email.		611	
Trainer Evaluation Questic	in_cas_register_oscess	register for and an active adoctate. A comparing r in this occur of callod and adhir to your registered email.		en	<u></u>

Sample of Prompt Maintenance screen.

To list the prompts relevant to the ESS system in the Prompt Maintenance screen, click the [**Query Mode**] button on the top-right of the screen, enter "**hr_ess%**" (without quotes) in the **Message Key** field, then click the [**Execute Query**] button, which was the [**Query Mode**] button when the screen was not in Query Mode.

To edit a prompt, click its corresponding Edit icon under the **Action** column, then double-click the **Message** field to bring up an editor popup, as shown below:

Human Capita	al Management		
¢⊡⊞ HCM Manager ▲	relevant	Message Maintenance	
Rearch	equired fields are indicated with a blue triang		
M	lessage Key Hr_Ess_Login_Pin_Expire A Reference Key	Message Your PIN has expired, Melser A Project Program Select Program - Locale en	Updat Cance
🖃 🗁 HCM Manager			
Position Control	Message Key Reference Key	User Proj	ect Program Locale Action
H Applicant Management	Ir_Ess_Certlic_Instructions	How to make a change request for certificates/licenses 2110. Couple-Circk	en 😒 🗶
H Workforce Planning	Ir_Ess_Direct_Deposit_Instructions	How to make a change request for direct deposit	en 🖄 🗙
🗄 🦲 Training	fr_Ess_Disciplinary_Action_Acknowledgement	By signing this notice, I am acknowledging that I have been counseled about my inappropriate conduct and informed of consequences if improvements are not made	en 😒 🗙
🕂 🧰 Performance Manage 🛛 H	Ir_Ess_Education_Instructions	How to make a change request to change education information.	en 🖄 🗙
E Compensation Manag	Ir_Ess_Emergency_Contact_Instructions	How to make a change request for emergency contacts	en 😒 🗙
H User-Defined Logs	ir_Ess_Instructions	Instructions	en 🖄 🗙
Employee Console	fr_Ess_Login_Fail	Employee number/pin code is not correct or you are rist a registered user!	X 🕑 🖉
Application Quest H	ir_Ess_Login_Pin_Expire	Your PIN has expired. Please change your PIN.	en 🐴 🏹 🗶
Application Status	Ir_Ess_Login_Server_Error	Login failed due to internal server errort	en 🔩 🗴
Area of Interest	fr_Ess_Login_Temp_Pin	Your PIN is temporary, please change 🔒 Edit Text - Mozilla Firefox	1et: click
Attendee Status	ir_Ess_Login_Temp_Pin_Expire	Your temporary PIN has expired, pleas	CII 20 *
Certifications and H	Ir_Ess_Membership_Instructions	How to make a change request for me	en 🖄 🗙
Class Status H	ir_Ess_Open_Enrollment_Title	 	en 😒 🗙
	Ir_Ess_Pin_Change_Error	Cannot change your PIN, the informatic -db>Your PIN has expired. Please change your PIN.	en 🖄 🗙
Corporate Perform = H	Ir_Ess_Pin_Change_Server_Error	Failed to update your PIN due to server	en 😒 🗙
Education H	ir_Ess_Pin_Change_Success	Your PIN is updated successfully, pleas	en 😒 🗙
- Frequency Status H	fr Ess Pin Email	Your temporary PIN is (0), it is valid unt HTML tags	en 🖄 🗙
- Geographical Are H	fr_Ess_Pin_Email_Subject	Temporary PIN for employee self service	en 😒 🗙
Hiring Actions H	Ir Ess Pin Reset Email	Your PIN is reset to (0), it is valid until (en 😒 🗙
HR Regions	fr Ess Pin Reset Email Subject	Temporary PIN for employee self service	en 😒 🗙
Membership Type H	Ir Ess Pin Reset Error	Cannot reset your PIN, the information you provided is not correct or you are not a registered user,	en 😒 🗙
- Menu Maintenanci H	fr Ess Pin Reset Server Error	Failed to reset your PIN due to server error.	en 😒 🗙
Organization Type	fr_Ess_Pin_Reset_Success	Your PIN has been reset and sent to your registered email.	en 😒 🗙

Use the editor to change the prompt, and click [Accept] when finished. Note that prompts can be formatted using HTML. On the main screen, click the [Update] button to save the changes.

In the Prompt Maintenance screen, the only fields that are relevant to the ESS module are: **Message key**, and **Message**. The other fields are used by the PM JSP module.

Appendix

Launching HCM Module

There are two main ways in which the HCM module can be launched.

Method 1: CMiC Launch Page

The **HR Self-Service** option under the **Software V10** section of the CMiC launch page, as shown below, can be used to launch the HCM module.

CM <i>i</i> C			
DEVELOPMENT TOO	LS	SOFTWARE V10	
CHOOSE A TOOL:	CHOOSE AN ENVIRONMENT:	CHOOSE A PRODUCT:	CHOOSE AN ENVIRONMENT:
 Treeview Builder Query Builder Process Builder Workflow Monitor Form Letter Definition Jasper Server / Analytics Program Builder Simple Menu Report Parameters Oracle Report Queue Server Logs Latest Server Log 	 testv10x pretestv10x 	Enterprise Console Enterprise Classic Classic without treeview Project Management Timesheet Entry HR Self-Service Opportunity Management Subcontractor Prequalification	• testv10x • pretestv10x
	RUN DevTools »		RUN Software »
			Logout

Method 2: Default Forms Treeview

The Human Capital Management link in the default Forms Treeview (Menu Type: v10 Menu, Menu Description: v10 Menu Default Menu) can also be used to launch the HCM module.



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