Student Supervisor Time Entry Approval Self Service (ESS) Training Manual

Colleague® by

<u>Introduction to Employee Self-Service (ESS)</u>

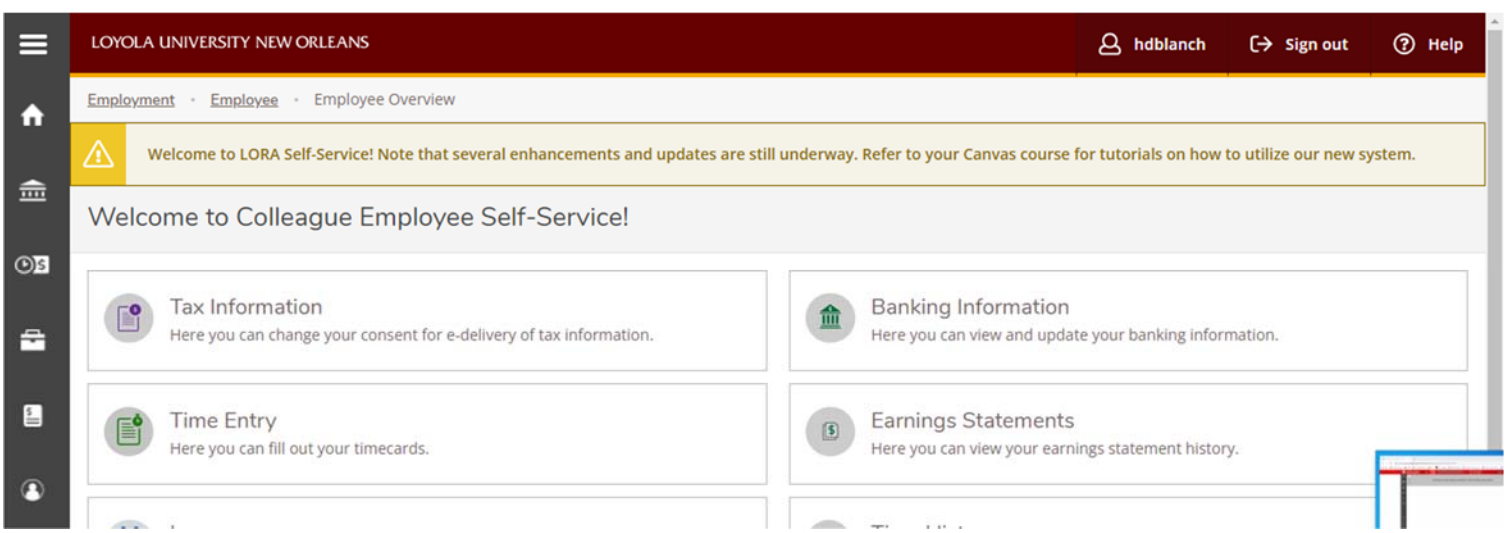
Employee Self-Service is a web-based portal that provides you with visibility to salary and benefit information contained within the Ellucian Colleague modules. The ability to view human resource and payroll data provides an excellent opportunity for you to ensure that the information is correct and kept up to date. The data visible to you includes current and past earnings statements (paycheck advice), current and past W-2's, direct deposit information, leave balances, and more. This is where you go to enter your time and where supervisors go to approve time.

One of the major advantages of this system is that the data is real-time data. In other words, when you view your information, the system pulls the most current information directly from the HR/Payroll system. If any of the information that you view within ESS is incorrect or you encounter questions, please contact the HR or Payroll office immediately.

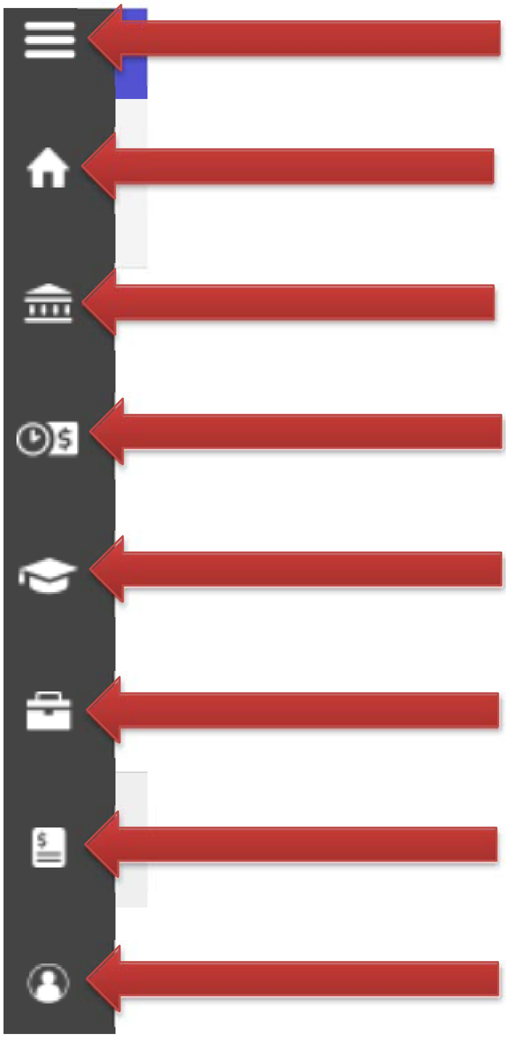
Log in SSO

Choose this icon and login:

You will see a screen similar to this:



This is the explanation of icons that appear along the left-hand side once you are logged in. You will only see the icons authorized for your position.



Click on this to expand the icons column. Click on it again will shrink the column.

Click on this to display the home page

Click on this to display the Finance information menu

Click on this to display the Employment menu

Click on this to display the Academic menu

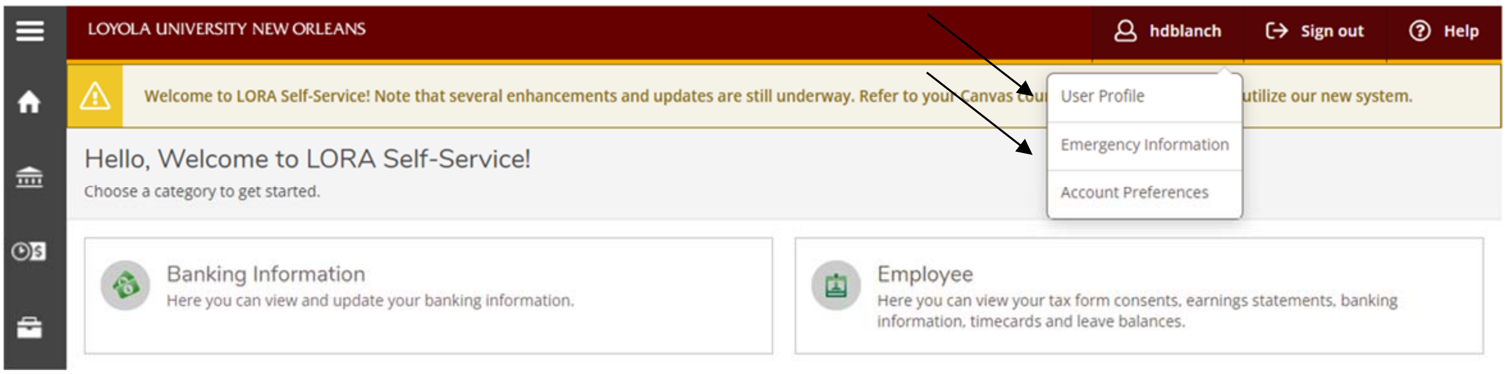
Click on this to display the Daily Work Menu

Click on this to display Vendor information

Click on this to display the User Options Menu

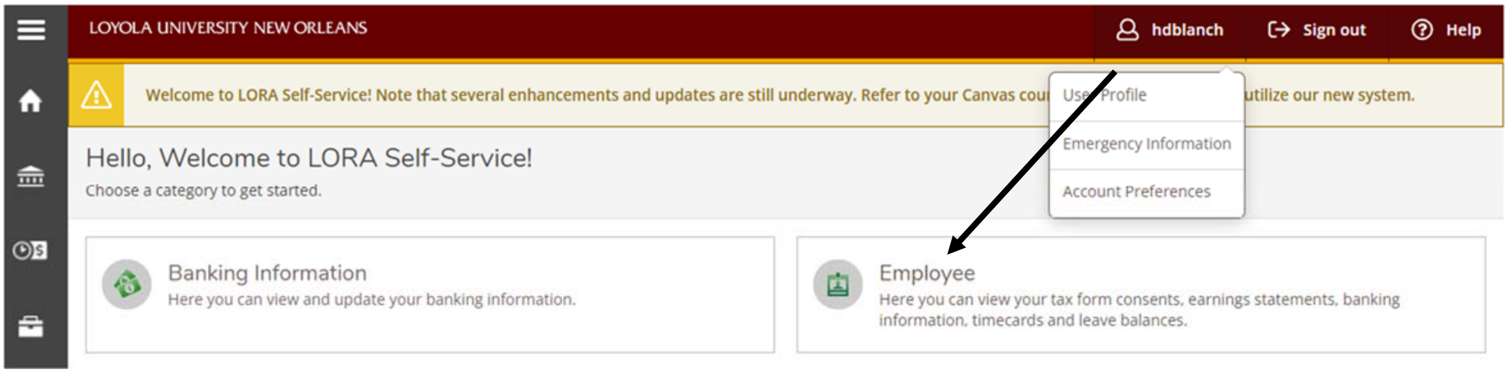
Managing Your User Profile

To access your user profile, click on your name in the upper right and then select "User Profile". It is very important that you keep the information in your User Profile current. You can view your address, phone number, and emergency contact information here, which can also be edited from this page.

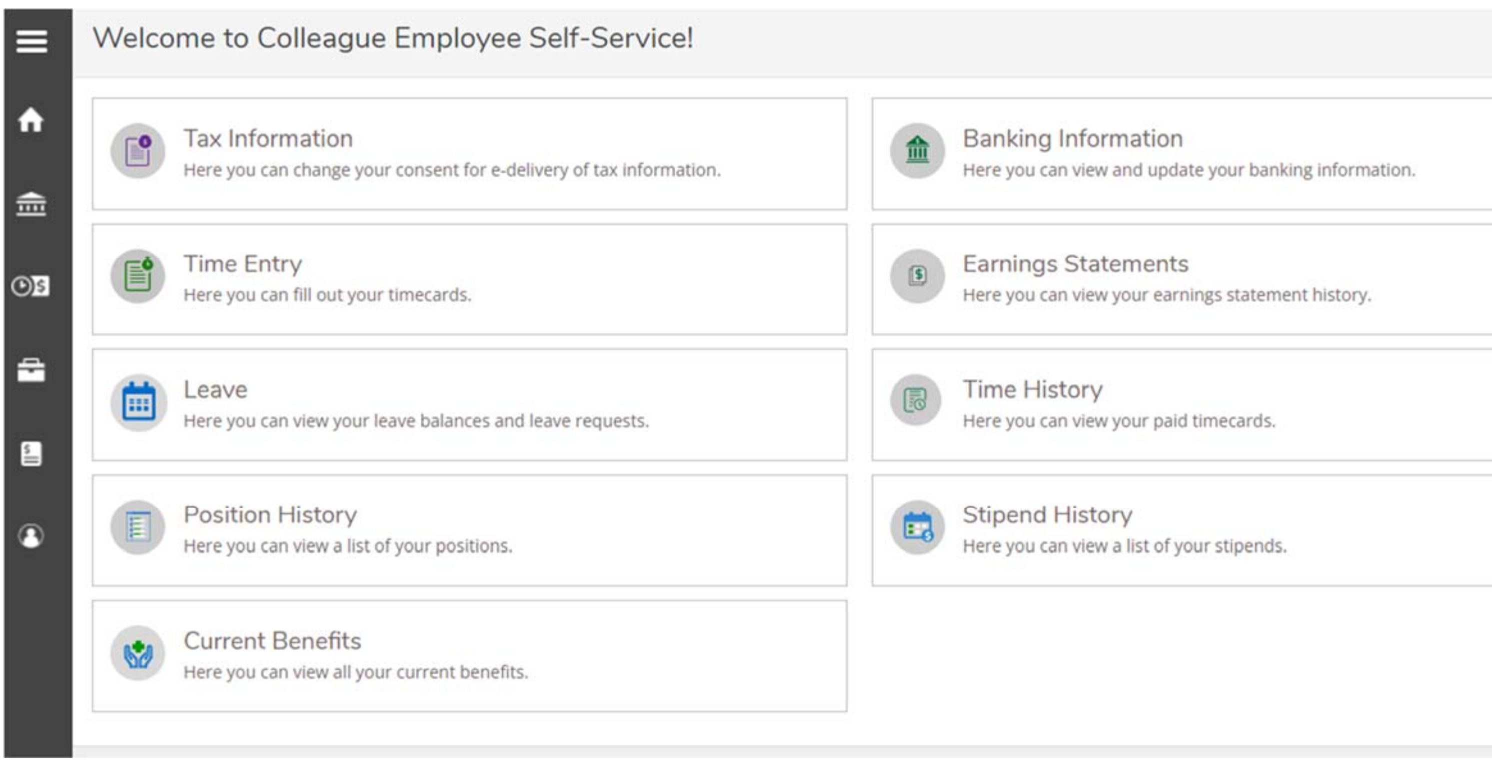


Accessing Employee Features within ESS

Click on the tab labeled "Employee".



This is where you will find all information related to Taxes, Time Entry, Earning Statements, Leave Balances, Leave Request, Banking Information, Position History, Stipend History, Total Compensation, Time History, Time Approval, Employee Proxy, Faculty Contracts, Current Benefits and Benefit Enrollment.



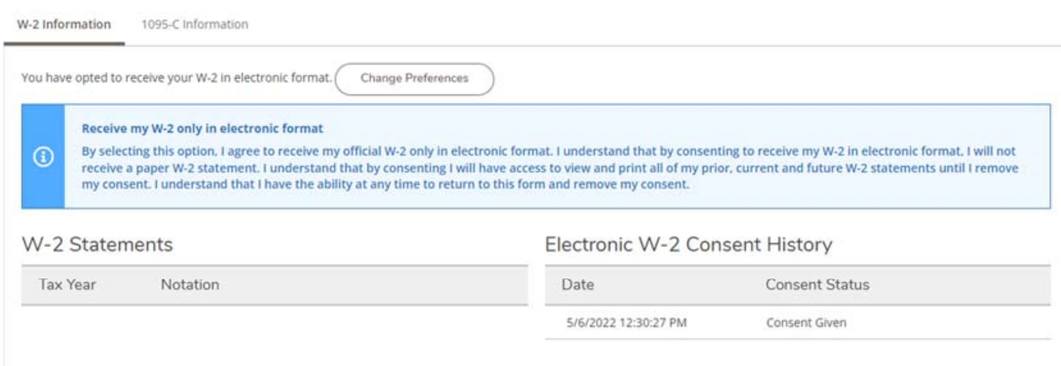
Employee Tax Information – W2's/1095C's

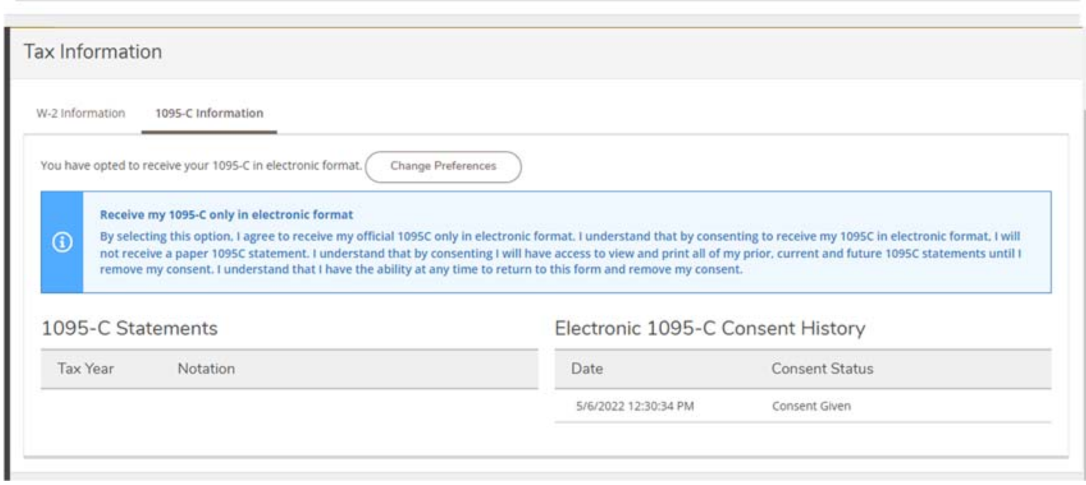
To view your Tax information, click on the "Tax Information" box.

In this area you can set your preference for receiving your W-2 and 1095C by clicking on the "Change Preferences" button. If you wish to receive them electronically then you can choose:

- Receive my W-2/1095C only in electronic format (Upgrade from EWS - **Official** Electronic W2 and 1095 forms; they may also be available to employees sooner than paper forms.)

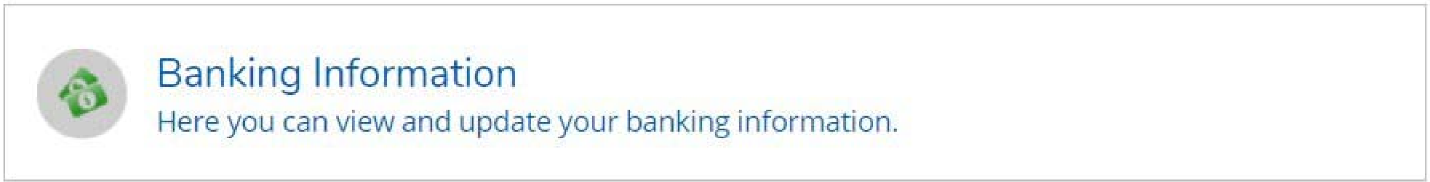
- You may also withhold consent and get your W-2/1095C on paper. The forms will be mailed on or before the IRS' required date to the address on file when the form is printed. Duplicates may not be requested until three weeks after the mailing date.



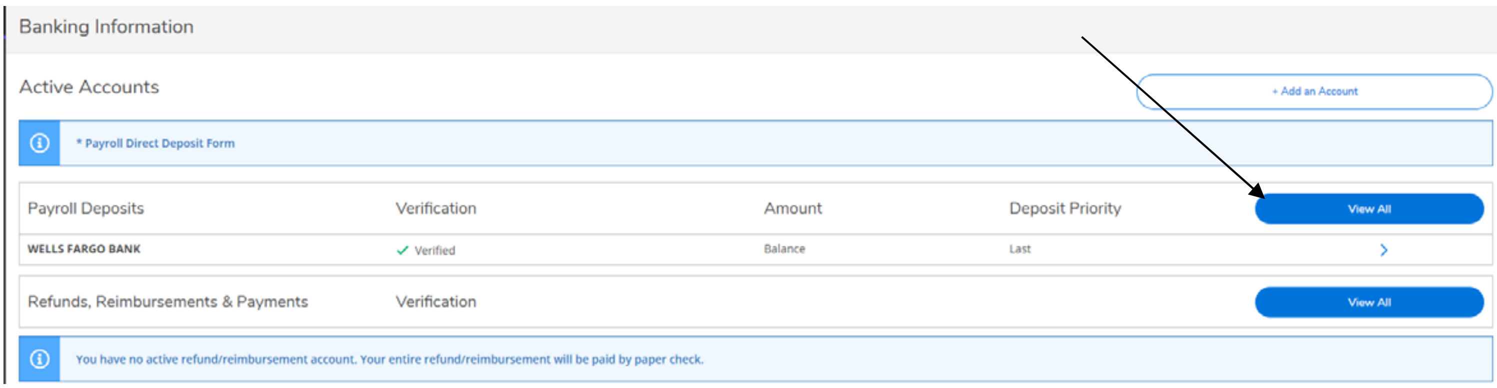


Employee Banking Information

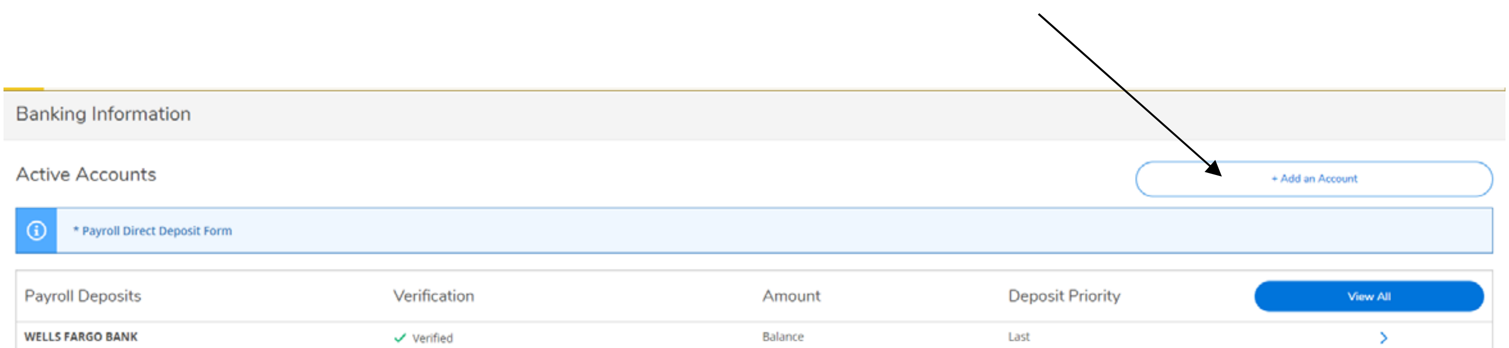
To view your banking information, click on the "Banking Information" box.



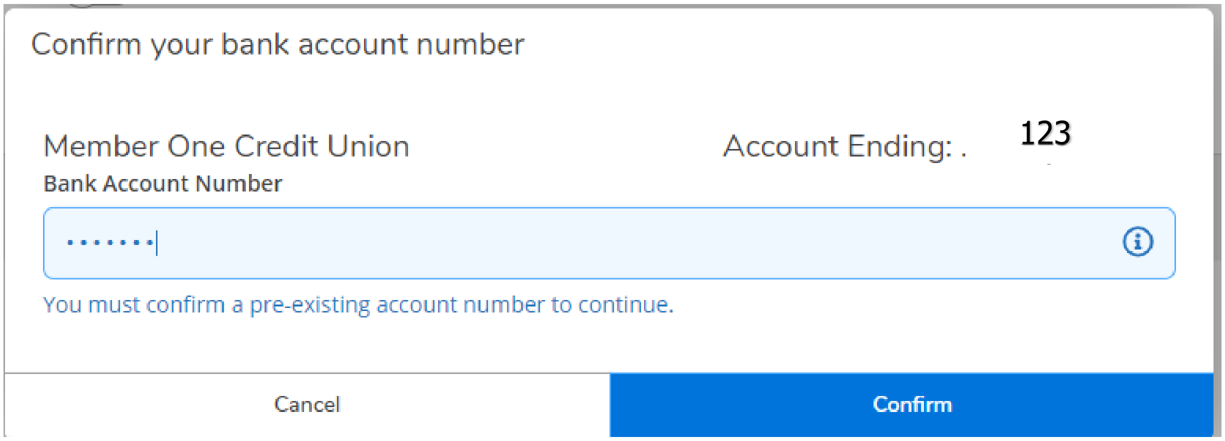
Please select "View All" to view your current banking information. Notice you can view both your payroll direct deposit accounts and direct deposit for checks processed through Accounts Payable (Refunds, Reimbursements & Payments).



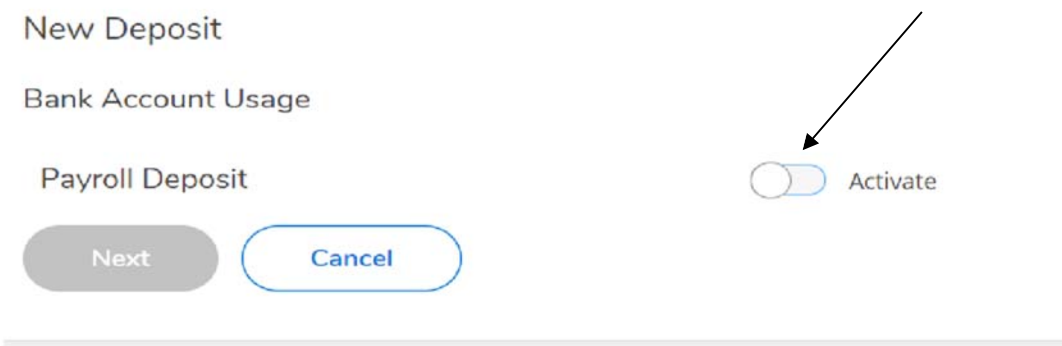
To make changes to your account, click the "+ add account" button.

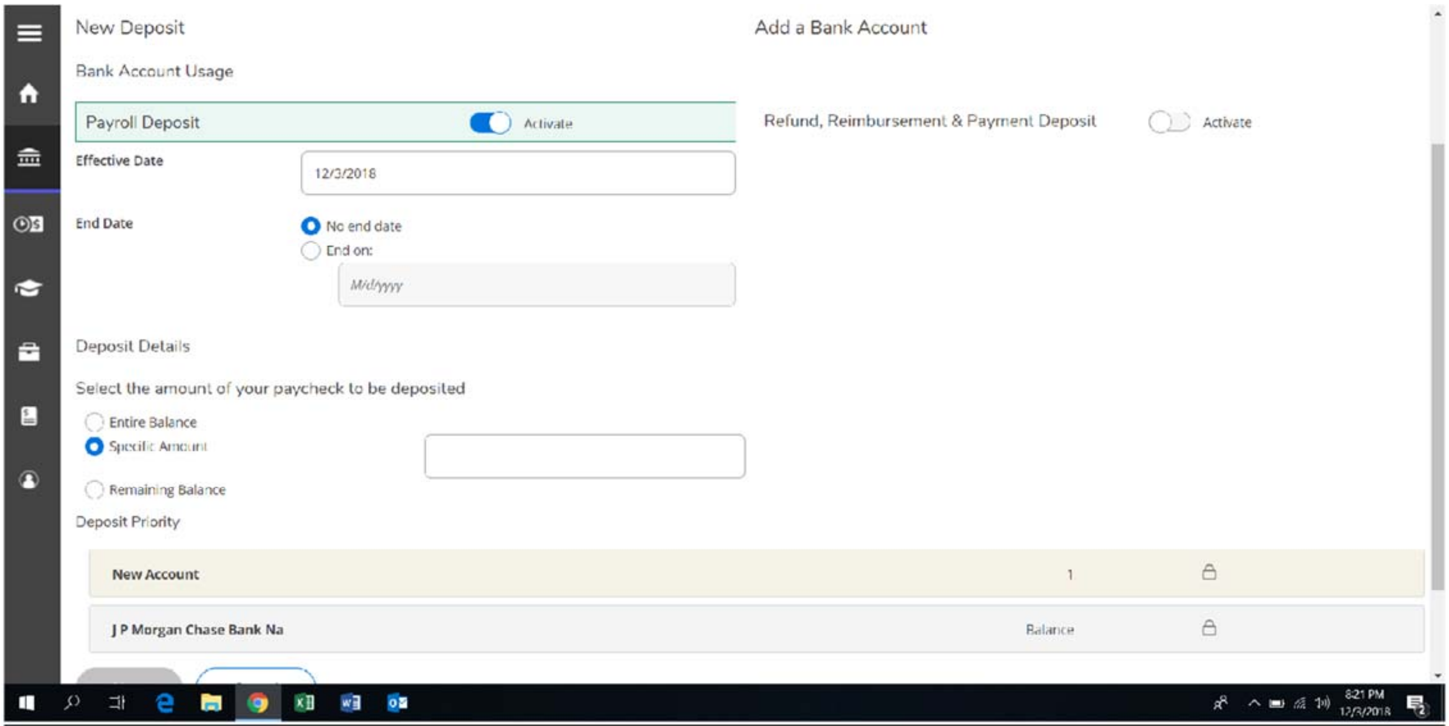


You will be required to confirm your existing bank account number at various stages of change requests. This feature is for your protection to safeguard against unauthorized changes.

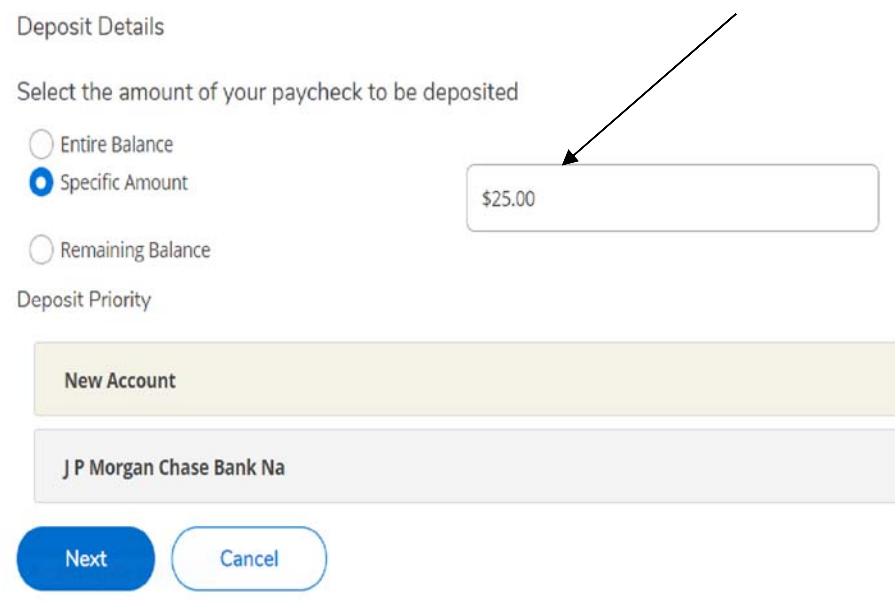


Slide the activation button and then enter the new or updated information as you need.

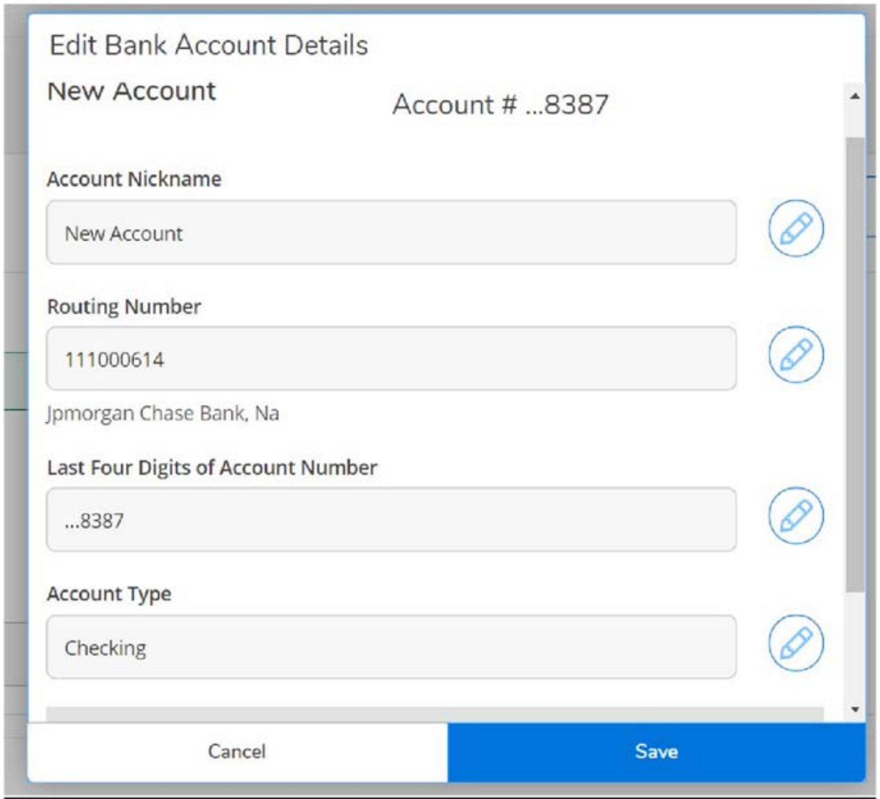




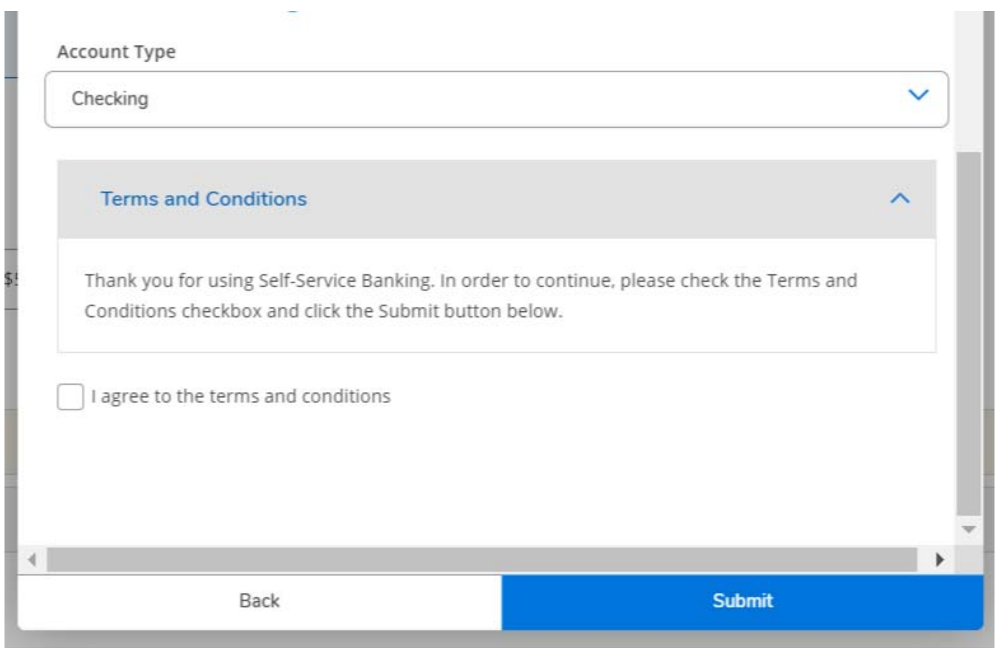
If you are depositing into multiple accounts and want to specify a specific dollar figure, enter as shown below. Then choose "Next".



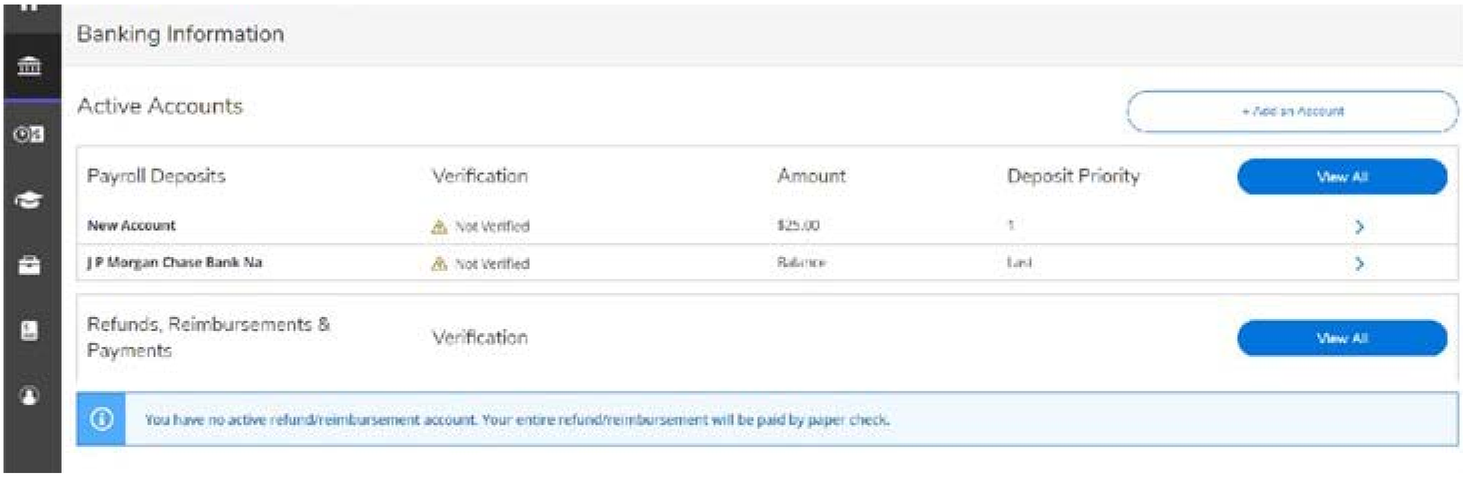
Add banking information in the prompts provided.



Accept the terms and conditions and save.



This is what it should look like after you make your updates.



Employee Earning Statements

To access your Earning Statements in ESS, click on "Earning Statements"

On this screen you can view your Earnings Statements, just click on the date of the one you want to view, and it will download. You can open to review or print it out.

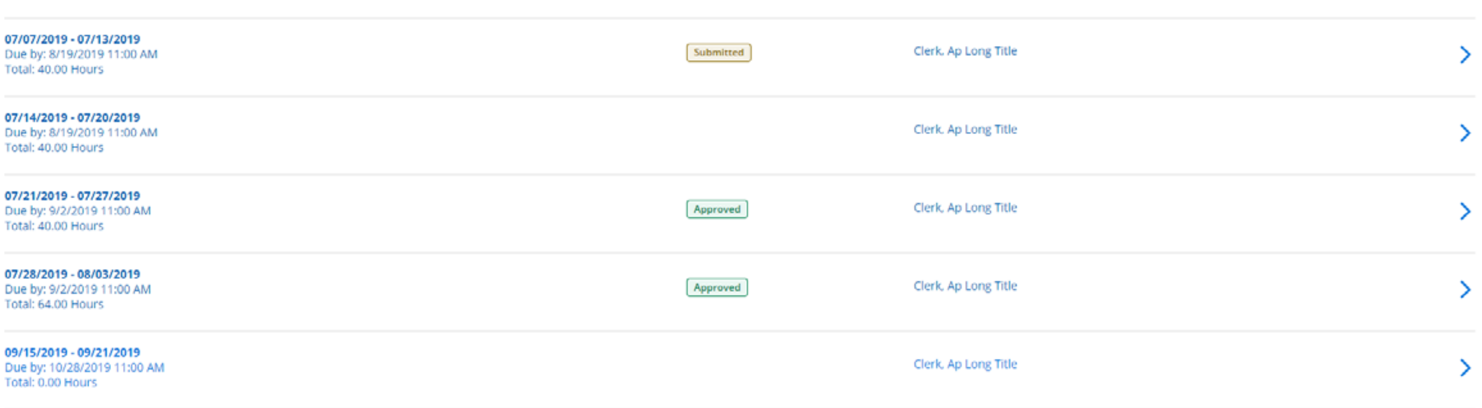
Time Entry and Approval

Employee Time Entry

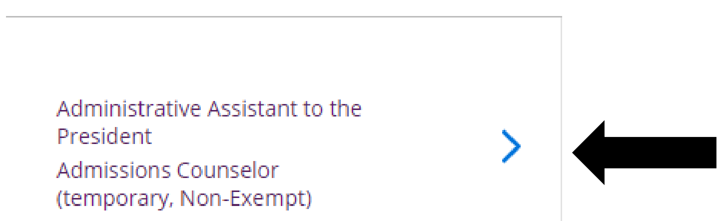
In the Time Entry area of ESS you can view, enter, make comments, and submit time worked. To start entering your time in ESS click on "Time Entry"

1. Select the pay period and click the blue arrow on the far right to open the timesheet.

   In this example, the person has one job.

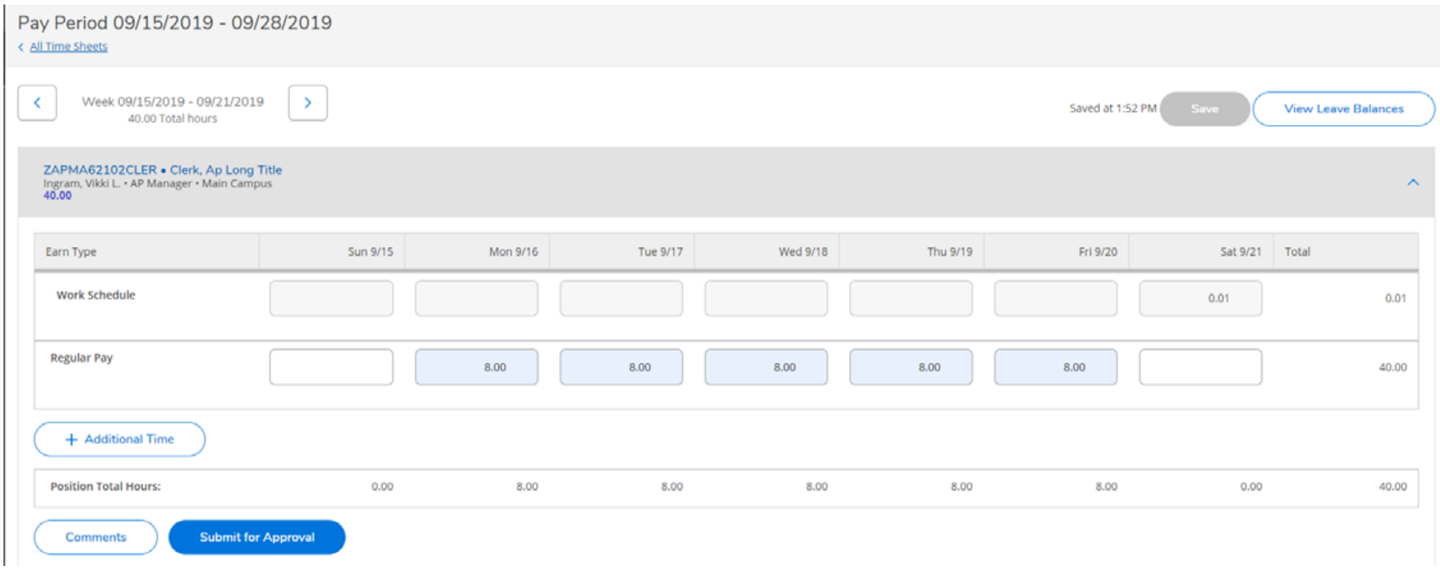


Multiple jobs will look like this; click the blue arrow to expand all timesheets.



2. Enter Time Worked. Your time will save automatically. There is a Save button, but you don't really need it.

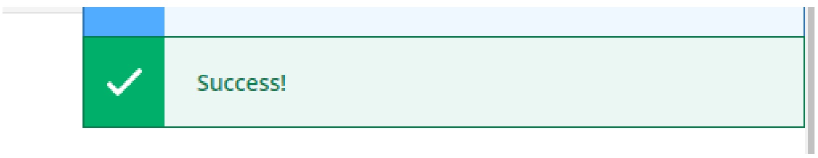
Summary time entry view



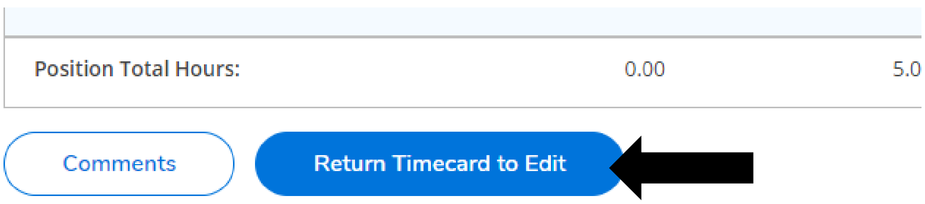
Notice that the arrows toggle back and forth between both weeks in the pay period to allow you to enter time on the correct week.

3. Submit time for approval based on HR policies. If you wish to make comments on your timesheet, you must do it before you "Submit for Approval".

4. After clicking "Submit for Approval" you will see this pop up in the upper right corner of your screen. Your Supervisor will get an e-mail that you have submitted your timecard.

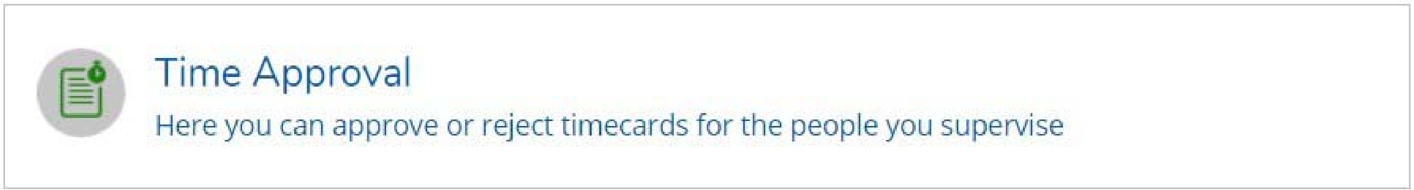


If you made a mistake on a timecard and you need to correct it, click "Return Timecard to Edit". Once you've made your changes, resubmit the time. Keep in mind that your Supervisor will get an email for each action that you make to the timecard.



Supervisor Time Approval

To access the time approval screen in ESS, click on "Time Approval"

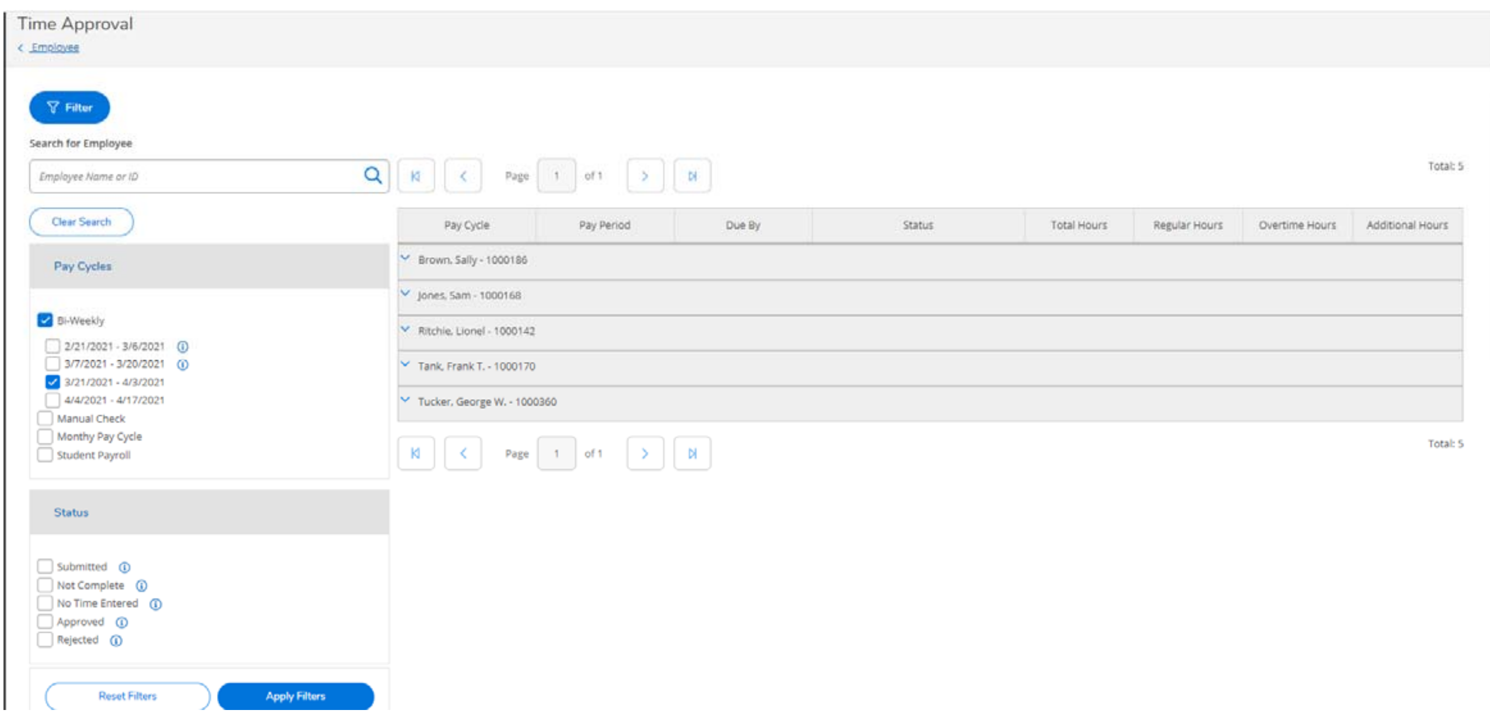


In the Time Approval area of ESS, you will be able to view, approve, reject, make comments and update your employee's time. There are multiple ways to do these functions. Any time you approve, reject, make a change, or unapprove a timecard, the system will send an email to your employee that you have done so. (*Terminology Tip: "Reject" is used before you approve a timecard to send it back to the employee for changes. "Unapprove" is used after you have approved the timecard and realize that corrections are needed.)*

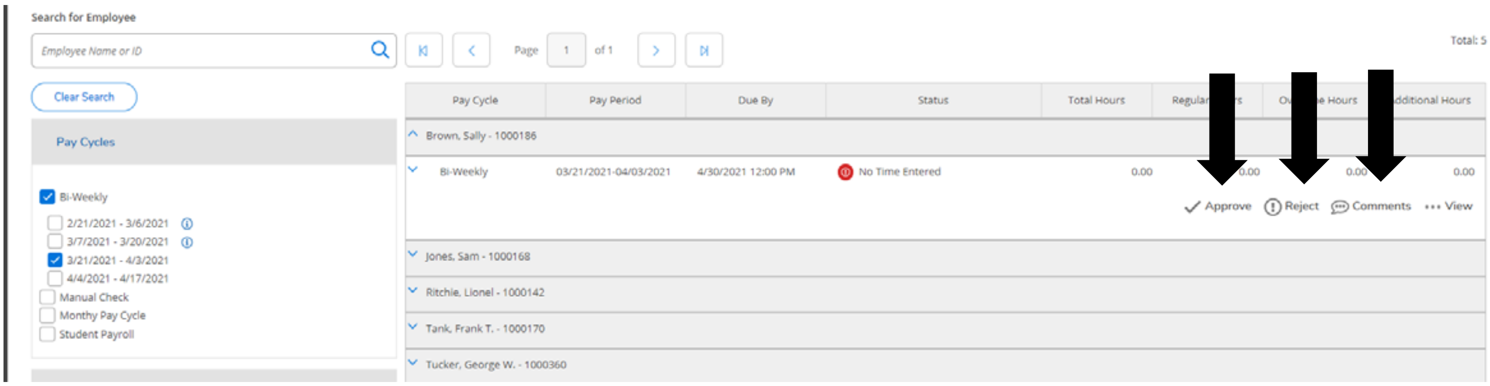
A few general tips about time approval:

- If you are editing time, please note that supervisor screens do NOT save automatically, unlike employee time entry screens. You must "save" your changes as you go along.
- Be mindful of which week you are approving time for as more than one pay period may be open.

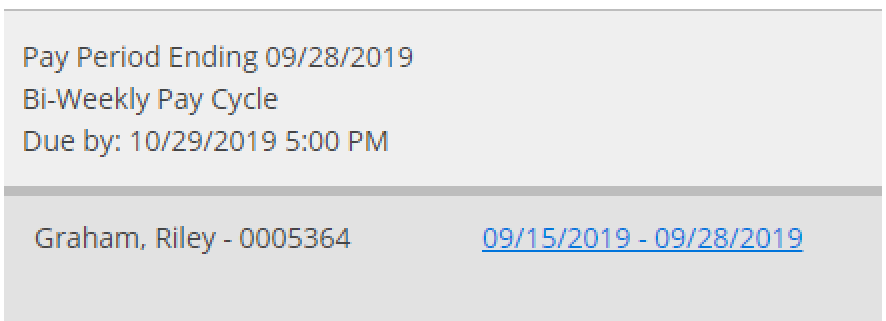
Filters are provided to make it easier to view different pay periods, statuses, etc.

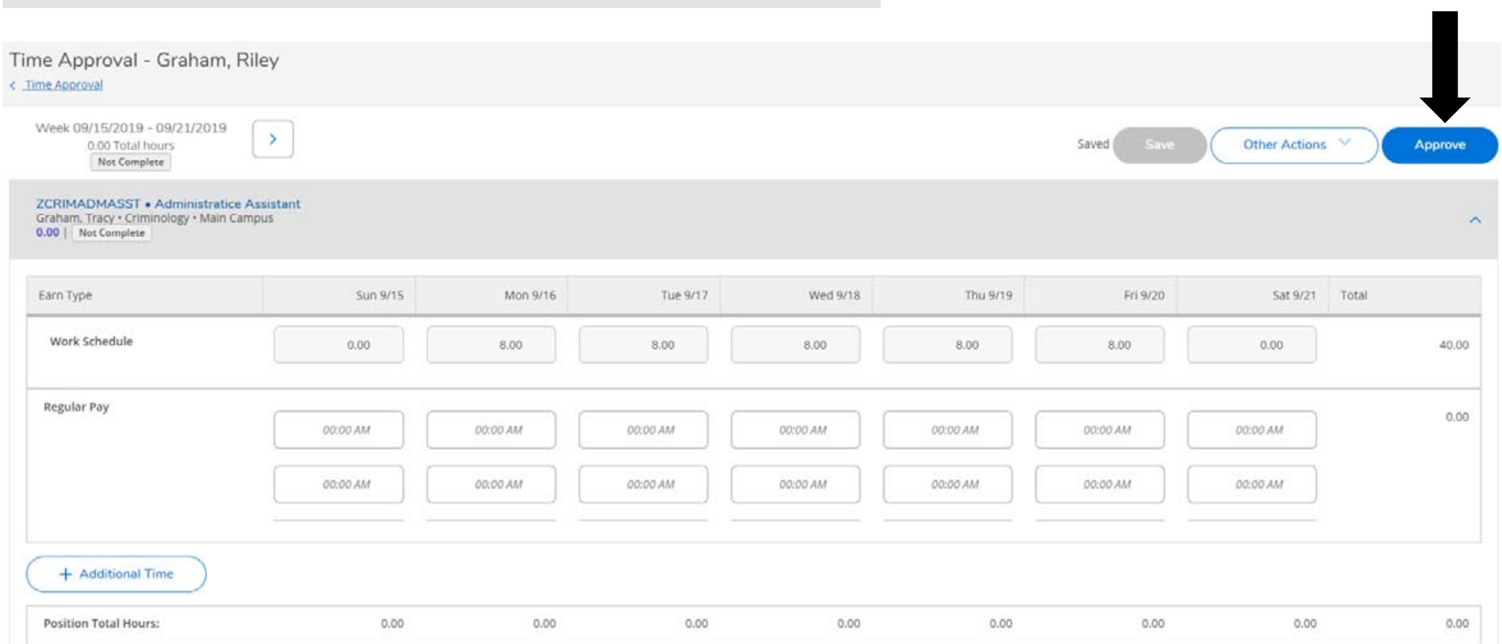


Supervisors have the option to approve, reject, or add comments. You have several ways to do all of these. Here is where you do it from the main screen.



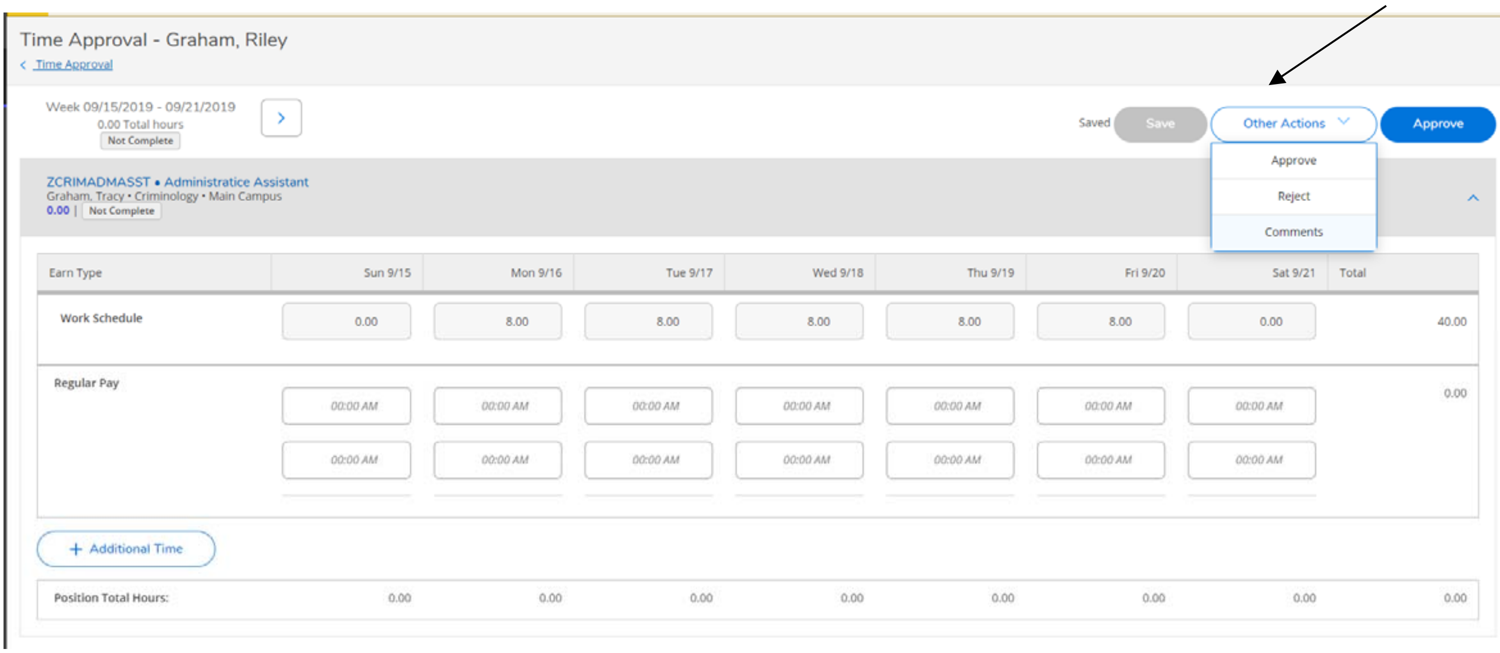
You can click on view to review the timecard detail. It is highly recommended you do this before approving timecards. You can edit the employee's timecard from here, as well as approve.



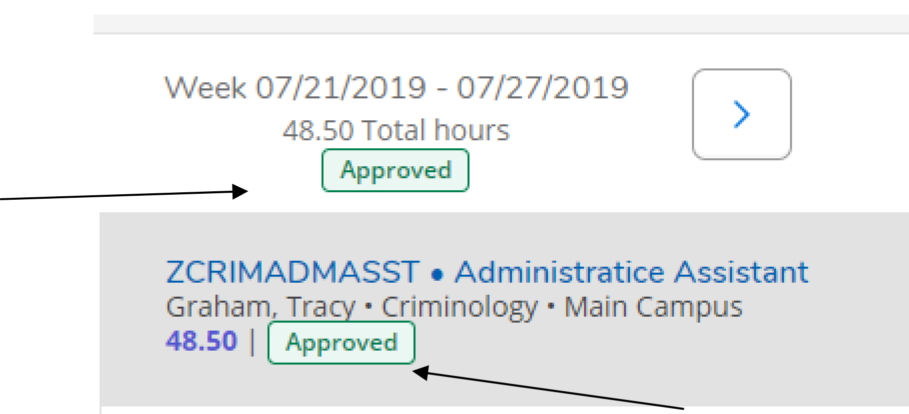


If you wish to add a comment, you must do it BEFORE you approve the timecard. If you forget, you will need to unapprove the timecard, make the comment and approve again. (Note: Your employee will get an e-mail when you unapprove the timecard, and again when you approve it.)

Another option is to click "Other Actions"; you can add comments and approve or reject from here.

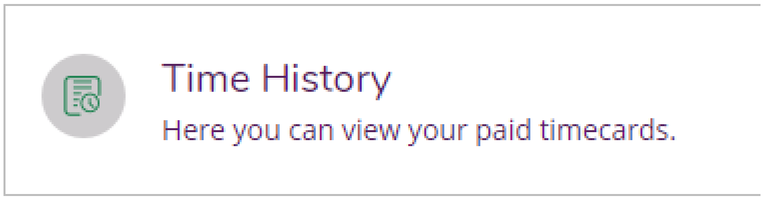


Once you have approved the timecard, green "Approved" boxes will appear and you are done with the employee.

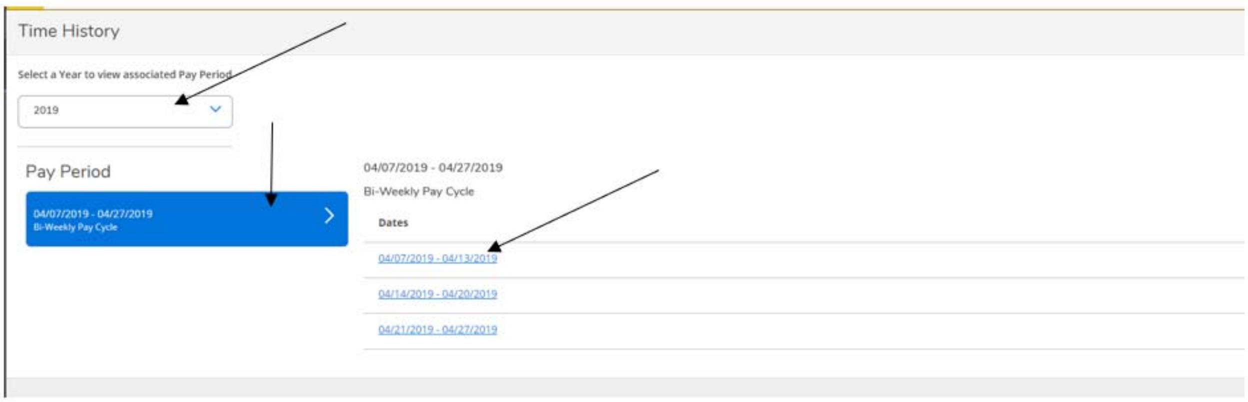


Time History for Employee

Select Time History

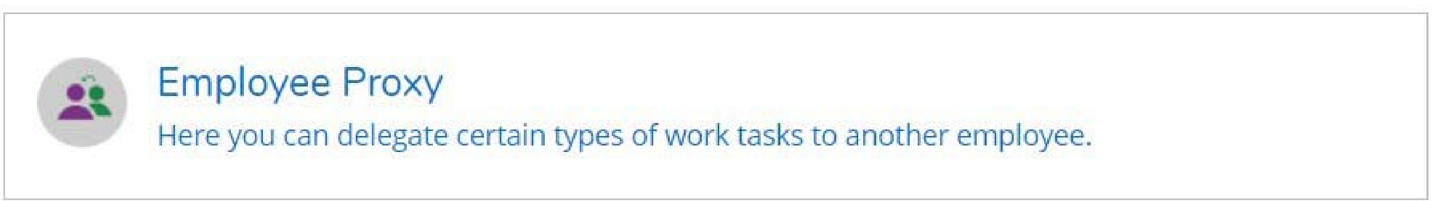


In this section you can view time sheet history. To change to a previous year, click the blue drop down arrow next to the current year at the top of the screen. Click the blue ">" to navigate between pay periods. Expand the timecard by clicking the date range on the right side of the screen.



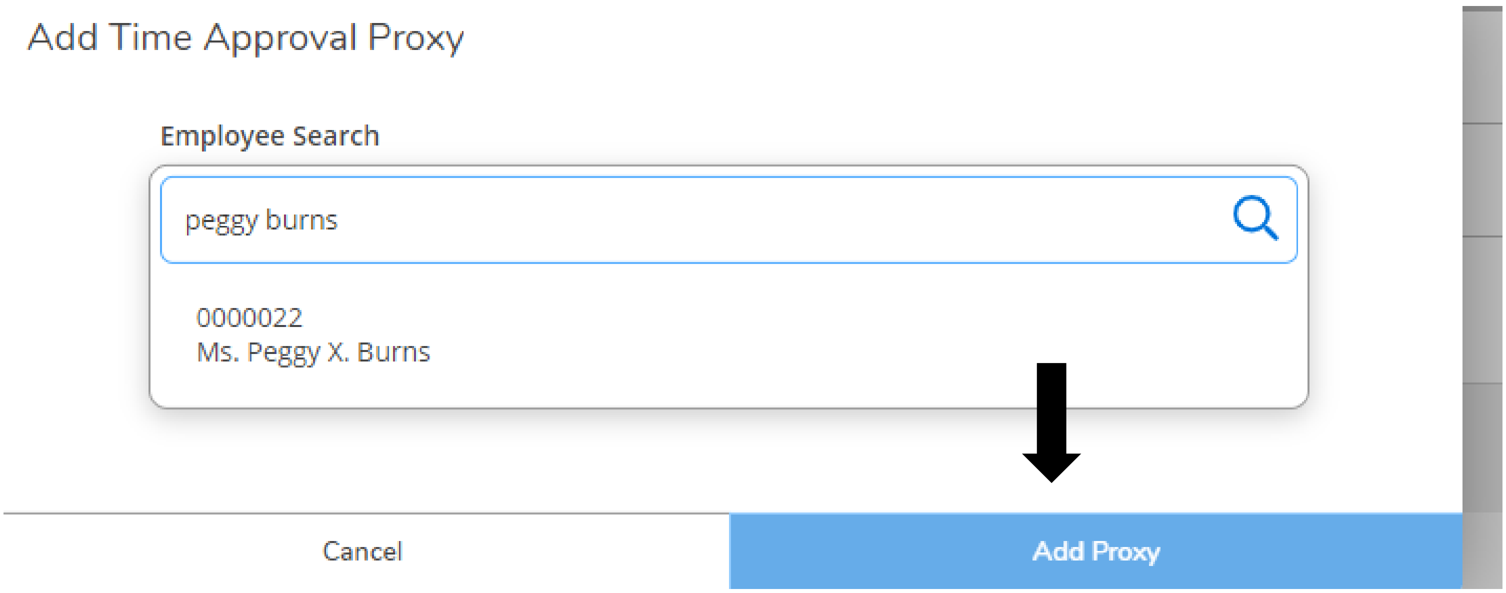
Set up a Timecard Proxy Approver

To access the employee proxy area in ESS, click on "Employee Proxy".



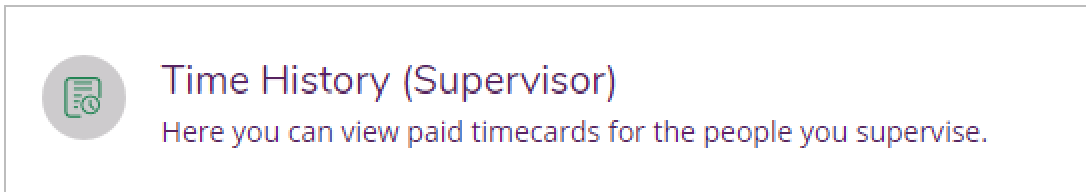
Click "+ Add Time Approval Proxy"

Enter the name of the person you would like to approve your timecards and select their name from the list that pops up. Once selected click "Add Proxy". The system is not date sensitive. Once you set up a proxy, it goes into effect immediately and stays on until you remove it.

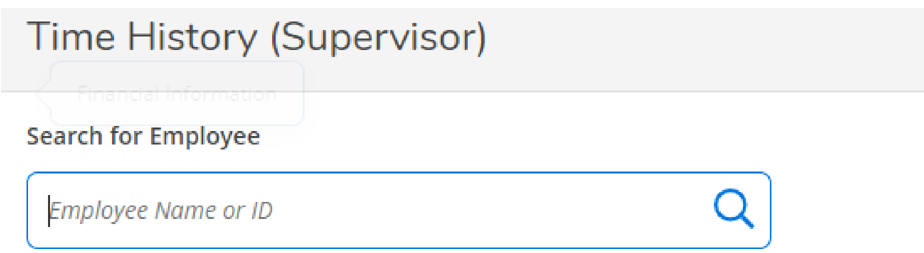


When you are finished, it will look like this. Click the red circled X to remove a proxy.

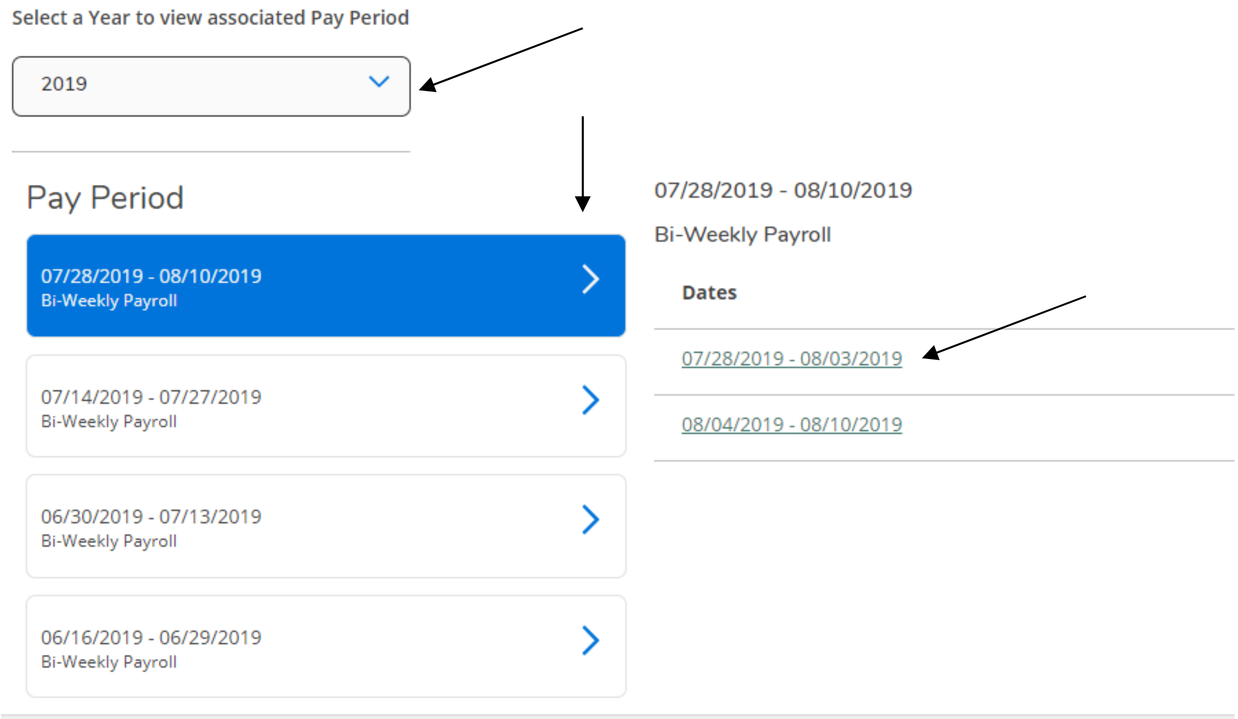
Time History for Supervisor



Enter in the name of the employee you would like to view and execute the search.



Once you have found the employee you are looking for, select the pay period and specific dates you wish to view. To change to a previous year, click the blue drop down arrow next to the current year at the top of the screen. Click the blue ">" to navigate between pay periods. Expand the timecard by clicking the date range on the right side of the screen.



Logging Off

You should always log off ESS by exiting using the "SIGN-OUT" link as shown below.