Employee Self-Service (ESS) Training Guide

This guide details all functionality available within the University’s Self Service system.
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Introduction
Employee Self Service is available to all Employees and Workers at the University of Leeds. Individuals will be able to view and update certain aspects of their personal/work-related data, view, save and print their current and previous payslips, check bank details, check remaining annual leave and submit leave requests to their line managers, and review their OD&PL/Faculty training record.

The aim of this guide
To detail and provide guidance on all functionality available within the University's Self Service Portal.

Assumed Knowledge
A basic understanding of Windows operating system and Internet Explorer browser.

Useful Terminology

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Org (Organisational) unit</td>
<td>Functional unit that defines the Organisational structure area e.g. Faculty, School or Department.</td>
</tr>
<tr>
<td>Position</td>
<td>Individual work descriptions - distinct &amp; specific e.g. SAP trainer or HR Manager - Faculty of Arts</td>
</tr>
<tr>
<td>Paid Leave</td>
<td>Annual Leave and other types of leave offered by the University.</td>
</tr>
<tr>
<td>Maundy Thursday</td>
<td>This is the day before Good Friday. If someone wants to take annual leave on this day i.e. the afternoon, then they need to select the appropriate Leave Type from the list of options e.g. Bank Holiday Hours or Maundy Thursday - Half Day.</td>
</tr>
<tr>
<td>Delimit</td>
<td>Limits the validity period of an object or an Infotype. e.g. the system may change an end date of an object or Infotype so that it is no longer valid in the current period but it is not deleted. This can also happen when a new Infotype record is created. The previous record's end date is changed to one day before the new record's start date.</td>
</tr>
<tr>
<td>Collision / Time Overlap / Conflict</td>
<td>When booking annual leave, if an absence (e.g. sick leave, maternity leave, jury service) has already been recorded for that period then an error message will be displayed within ESS informing the user that there is a collision. Usually the system will show which leave type and date range it is colliding with.</td>
</tr>
<tr>
<td>HESA</td>
<td>HESA is the Higher Education Statistics Agency. HESA collects data for its own analysis as well as government education departments and funding bodies. The University is required to provide detailed information about anyone who is subject to class 1 National Insurance.</td>
</tr>
<tr>
<td>FTE</td>
<td>Full Time Equivalent.</td>
</tr>
<tr>
<td>Chief</td>
<td>SAP terminology for a manager of an org unit.</td>
</tr>
</tbody>
</table>
Logging in
The Self Service Portal system uses the same University network username and password that you would use to log into your PC at work. There are no additional usernames and passwords required.

To access the system enter the following URL into the address bar in your browser:

https://selfservice.leeds.ac.uk

Enter your standard University username and password and click Log on.

Important Security Advice
Logging Out:
It is important to log out using the Log off button near the top right corner of the window. You will then be prompted ‘Are you sure you want to log off’. Click ‘Yes’ to confirm.

Once you have logged off, close down the browser window completely by clicking in the top right corner. This is to ensure that all your personal details are protected.
Employee Self-Service (ESS) Training Guide

This guide details all functionality available within the University’s Self Service system.

Browser password storage:
Your browser may offer to remember your password for the Self Service website when you log in for the first time, it is strongly recommended that you do NOT accept this.

General Navigation

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview</td>
<td>Returns you to the Home screen.</td>
</tr>
<tr>
<td>Log off</td>
<td>Exit the system (For security purposes, close the browser once you have logged off).</td>
</tr>
<tr>
<td>New</td>
<td>Create a new record/entry.</td>
</tr>
<tr>
<td>Edit</td>
<td>Amend or change an existing record.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes the record.</td>
</tr>
<tr>
<td>Save and Back</td>
<td>Save changes and return to previous screen.</td>
</tr>
<tr>
<td>Cancel</td>
<td>Return to previous screen without saving any changes.</td>
</tr>
<tr>
<td>Section Tabs</td>
<td>Navigating around screens containing information in tabs. Click on the tab name to display the contents of the screen.</td>
</tr>
<tr>
<td>Words underlined in blue (links)</td>
<td>Click on the link and it will take you to the appropriate screen.</td>
</tr>
<tr>
<td>Expand Data</td>
<td>Click the button to display (expand) the data below.</td>
</tr>
<tr>
<td>Collapse Data</td>
<td>Click the button to hide (collapse) the data.</td>
</tr>
<tr>
<td>Refresh</td>
<td>Updates the system so any changes can be reflected in the current view.</td>
</tr>
</tbody>
</table>
Further information

View-only screens allow the users to only view the data. Some screens allow you to create new records. These screens will have an ‘Add’ button. If there is an edit icon then amendments can be made to the existing data displayed.

If you notice any view-only data that is incorrect then please contact your local HR Hub and inform them of the required changes.

Most Frequently Used section

This area will populate and automatically update as you use the system. The links listed here can be clicked to go directly to the relevant section.

Quick Help Text

Quick help text provides useful additional information which is displayed on the majority of the ESS screens. It provides contextual guidance to the user within the displayed screen.

The Quick Help Text can be switched on or off either by clicking the Help icon and selecting “Quick Help” or by right-clicking on a specific information area and selecting Display/Hide Quick Help.

Below is an example of the quick help text displayed in the Pay Details section of the Work Profile:

Note: not all screens contain quick help text.
Overview Screen

Working Time

Annual Leave

Providing annual leave quotas have been created within SAP, individuals will be able to request Annual Leave through Self Service. The request can be sent to the relevant line manager (as defined in the SAP HR organisational structure) who can then approve or reject it through Manager Self Service.

In general it is only possible to request leave dates for the current leave year, however local annual leave administrators are able to create leave quotas for the following leave year if required, which will then enable individuals to submit leave requests for that leave year.

Outstanding leave balances can be monitored and any other absences that have been recorded against an individual’s SAP HR record can be reported on here e.g. sickness, family responsibilities, jury service etc.

Full-time employees will generally receive their holiday entitlements in days. Part-time employees normally receive their holiday entitlements in hours. This is because many part-time staff work different hours throughout the week so it ensures that their holidays are deducted correctly. Additionally, full-time staff who may have an irregular shift pattern due to the nature of their work (Security staff for example) should have their annual leave in hours.

Part-time staff receive a pro-rated bank holiday allowance also calculated in hours. This means that if for example a part-time Clerical staff member is 50% FTE (Full Time Equivalent) then they will be entitled to 50% of the total Bank Holiday and University closed days, currently 15.5 days. So 50% would be 7.75 days, or 54.25 hours.
The University’s policies on annual leave entitlements can be found at the links below:

Academic and academic related (professional and managerial) staff:
http://hr.leeds.ac.uk/info/36/leave_annual_leave_and_bank_holidays/21/academic_and_academic_related_professional_and_managerial_staff_annual_leave_entitlement

Support staff annual leave entitlement:
http://hr.leeds.ac.uk/info/36/leave_annual_leave_and_bank_holidays/223/support_staff_annual_leave_entitlement

Bank holidays and University closed days for part time staff:
http://hr.leeds.ac.uk/info/36/leave_annual_leave_and_bank_holidays/169/bank_holidays_and_university_closed_days_for_part_time_staff

How to create a leave request:
Click Working Time then Create Leave Request

Complete the following section and click Send:

**Entering Leave dates**
Leave dates can be entered in three ways:

(i) Type the date directly into the relevant field. Enter the first working day into the ‘Start Date’ field and the last working day into the ‘End Date’ field.

The following formats can be used:

- 25.06.2019
- 25062019
- 25.06.19
- 250619
- 25.6.19
(ii) Use the calendar by clicking on the icon to the right of the ‘Start’ and ‘End Date’ fields:

Click here to move back 12 months

Click here to move forward 12 months

Click here to move to the previous month

Click here to move to the next month

Once you have located the appropriate month, simply click with your mouse on the required date.

(iii) Click into the Personal Calendar at the bottom of the screen. If requesting more than one day, click on the first day and then whilst holding down the [Shift] key, click onto the last working day. The date range requested will now be populated in the leave request screen:

Once the date range has been selected in the Personal Calendar below the ‘Start Date’ and ‘End Date’ fields are automatically updated.

The user selected 19th May, held down [Shift] and then clicked on 23rd May. You can see the date range is shaded in yellow and the ‘Start Date’ and ‘End Date’ fields above have been updated.
Personal Calendar
The Personal Calendar, located at the bottom of the screen, displays the absence entries of the individual. The calendar is colour-coded to show the various types of absences.

<table>
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<tr>
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<th>Multiple Entries</th>
<th>Sent</th>
<th>Deletion Requested</th>
<th>Non-Working Day</th>
<th>Holiday</th>
</tr>
</thead>
</table>

Hovering the cursor over a specific colour-coded date will display information on the specific type of absence.

Below is an example of a leave request from a part-time employee. Here it can be seen their leave is requested in hours:

![Leave Details](image)

**Note:** The number of absence hours above is determined by the personal work schedule held for the individual on their SAP HR record.

Changing the Approver
An Approver will be displayed which is the default manager of the organisational unit in which the individual is located. The Approver can be changed by clicking on the search icon and searching in the appropriate fields:

**Approver Name:** Mr Karl Karlsson

Click here to search for another Approver
The ‘Approver’ search box will be displayed. In the example below the individual has typed in the approver’s surname.

Click [Start Search] to start the search.

There is one person who meets the search criteria, listed below:

The approver’s name will now be inserted into the appropriate field as shown below:

Once all leave details have been entered click [Check].

This check will confirm whether there are any issues with the request e.g. a collision with a sickness where the dates are overlapping. It will also check the dates requested are working days according to the work schedule and that there is enough leave available in the quota.

For a part-time member of staff the system will display the number of hours requested into the ‘Absence hours’ field based on the work schedule held for the individual.

If the data has been entered correctly and there are no issues then a message confirming this will be displayed at the top of the screen:
Click here to send the holiday request to the selected approver.

Click [Send] as shown above to confirm the request. A dialogue box summarising the leave request will be displayed:

![Leave Request: Annual Leave Hours, 19.05.2014-23.05.2014 00987344](image)

**Type of Leave**

- **Type of Leave:** Annual Leave Hours

**General Data**

- **Start Date:** 19.05.2014
- **End Date:** 23.05.2014
- **Absence hours:** 18.75
- **Approver Name:** Mr Karl Karlsson
- **Note:** As discussed.

Click **OK** to confirm or click **Cancel** to cancel any changes and exit the screen.

Check you are happy with the details and then click **OK** to confirm or click **Cancel** to cancel any changes and exit the screen.

The following message will be displayed to confirm that the leave request has been successfully sent to the approver:

**Leave Request: New**

- **Send**
- **Leave request was sent successfully**
The requested leave will be displayed within the Leave Requests tab at the bottom of the Create Leave Request screen:

Click on the link to view Leave requests.

Click on the link to view details relating to the leave request including any notes entered on the request.

Here you can see any notes entered within the leave request.
Maundy Thursday

The university is closed on the afternoon of Maundy Thursday. If an employee wants to take the morning off as annual leave then they need to select the appropriate ‘Bank Holiday’ leave option from the drop down list. This will normally be ‘Bank Holiday hours’ for part-time staff and ‘Maundy Thursday-Half Day’ for full-time staff. ESS will display an error if the normal ‘Annual Leave’ option is requested.

Cancelling or Amending a Leave Request

Cancelling or amending leave can be done in the ‘Leave Overview’ section within ‘Working Time’.

If the leave has not yet been approved, then it can simply be deleted/cancelled and the request will be removed from the Approver’s workflow. However if the leave has been approved then the cancellation will need to be sent to the original approver for confirmation before any time is re-credited to the employee’s annual leave quota.

For an approved request:

Click on the Bin icon  to the left of the leave request, check the Approver name, click Send and Back and then Ok to confirm.

For an unapproved request:

Click on the Bin icon  to the left of the leave request and click Yes to confirm the cancellation.
To amend an existing entry e.g. change the dates of a request or the Approver, click the Edit icon for the leave that needs amending. The leave request screen will be displayed. Amend the appropriate fields and add any notes.

To save the amended request click:

- **Send and Back** to send the updated record to the selected approver and return to the Overview screen.
- **Send and New** to send the updated record to the approver and then create a new leave request.

If the details entered are valid then a summary message similar to the one below will be displayed:

If the details entered are not valid for any reason a warning message will be displayed. Amend the request and re-send it.
Once the request has been re-submitted a confirmation message similar to the one below will be displayed:

☑ Leave request was sent successfully

Team Calendar
This can be found in the lower half of the ‘Create Leave Request’ section.

The Team Calendar displays the absences of other employees that sit within your organisational unit in the SAP HR Organisational Structure. This is useful to view who will be absent on a specific week for example:

![Team Calendar](image)

Time Accounts
This can be found in both the lower half of the ‘Create Leave Request’ section and in the ‘View Time Account Balances’ section within ‘Working Time’.

Displays Annual Leave quotas for the selected holiday periods, including the balance remaining:

![Time Accounts](image)

Leave Requests
This can be found in both the ‘Create Leave Request’ section and in the ‘Leave Overview’ section.

A summary of leave requested and other absences and the current status for them is displayed:

![Leave Requests](image)
## Employee Self-Service (ESS) Training Guide

This guide details all functionality available within the University’s Self Service system.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sent</td>
<td>Request has been sent to manager/approver and is awaiting action</td>
</tr>
<tr>
<td>Approved</td>
<td>The Leave has been approved by the approver</td>
</tr>
<tr>
<td>Rejected</td>
<td>The Leave has been rejected by the approver</td>
</tr>
<tr>
<td>Used</td>
<td>The number of hours or days deducted from the employee’s holiday quota</td>
</tr>
</tbody>
</table>

### View Time Account Balances
Displays your leave balance and other time account information:

![Time Account Balances](image)

### Leave Report
Displays all absences recorded on an employee’s SAP HR record for a selected period:

![Leave Report](image)

To Export the data to Excel click ‘Export’ and select ‘Export to Microsoft Excel’.

A dialogue box similar to the one below will be displayed. Click **Open** to view the spreadsheet or click **Save** to save it to a location of your choice.
Benefits and Payment

Salary Statement

Displays your payslips. The latest payslip will be displayed by default. The payslip should display in a window within Self Service although in some cases it will open in a new Adobe Reader window.

To display previous payslips click the ‘Previous Statement’ or ‘Next Statement’ buttons to view the following (up to the current month) or previous month’s statement:

![Previous Statement and Next Statement buttons]

**Note** Individuals will lose access to Self Service (and therefore access to online payslips) if they leave the employment of the University.
Printing and Saving Payslips

Functionality to print or save a payslip may vary depending on the versions of Internet Explorer and Adobe Reader installed, as shown in the two images below:

To save a payslip to the M: Drive (or other secure location) click on the Save icon or and select the desired location from the Save-As pop-up window.

To print a payslip click the Print icon or and select the desired printer.

Please note: payslips should only be sent to a secure printer, or one you have immediate access to.
Personal Information

Personal Profile
Personal data, such as addresses and bank details can be created, amended or deleted here. Click the appropriate tab to display the details within that screen.

Personal Data
Displays your personal details such as name, nationality and gender.

This is a view-only screen:

Addresses
Displays your Permanent Home and (if recorded) Emergency address details:

Adding Address details
To add a new address record click on the icon and select either Permanent address to record a new home address or Emergency address for emergency details.

Postcode Address Lookup
To find an address using the lookup facility, enter the postcode into the Postal Code Address Lookup field, click on the button to the right of the field to search and select the desired address from the list.
Information added into any fields through the postcode address lookup should not be amended, though further detail may be added into any fields that remain blank.

If an address cannot be found using the Postcode lookup details can be entered manually instead.

Only UK addresses may be entered here. Any addresses outside of the UK must be entered by a local HR administrator.
Recording Emergency Contact Details

When recording emergency details it is important to record the emergency contact's name and relationship to the employee in the 'c/o' field as shown above.

Viewing Emergency Contact Details

If more than one Emergency Address record is created in SAP, Self Service will only display records that are currently valid and future ones.

Amending existing address details

- Click on the appropriate edit icon and amend the fields.
- Click to save the record and go back one screen.
- Click to cancel your amendments and retain the original information saved.

Bank Information

This shows the main bank account that an employee's salary will be paid into. To **amend** the current record or **create** a new bank record click the **pencil edit icon**.
The new record can be made valid from ‘Today’ or from a specified date. However, the validity date of the new bank account record will depend on when in the month the record is created, relative to an individual’s payroll area and the University’s Payroll timetable.

Enter the new Sort Code and Account Number into the respective fields and click ‘Save and Back’ to save the record and return to the Personal Profile screen.

**Note:** The sort code should be entered as six digits without spaces e.g. 309491.

If Payroll is locked whilst making these changes then a message will be displayed informing when the account will become valid.

An individual will also receive an email immediately confirming bank details have been updated through Self Service.

It is generally advised to only create new bank account records from the first of the following month.

The bank details will be checked against a predefined set provided by the banks. The sort code needs to be entered in the following format: **001199 (six digits with no spaces)**

If the changes are close to the salary payment date then the following message may be displayed:

**Deleting a future bank record**

Any bank account records that have been created as of a future date are able to be deleted by clicking on the Bin icon next to the pencil. If you do delete a future record the existing bank account entry will automatically be re-extended.
Equality Data
Holds equality information such as ethnic origin, disabilities, gender and religion.

Equality data can be amended by clicking on the pencil edit icon. Changes will be saved effective from the current date.

Academic Qualifications
Information will only be displayed here if the University holds qualification data for you. Currently this is only held for Academic, Academic-related and Technical staff.

Expenses
Any bank detail changes will also apply to e-expenses payments. For other e-expenses queries please see the separate guide on the University’s Finance website:
http://www.leeds.ac.uk/finance/e-expenses/e-expenses/e-expenses_staff_5.html
Work Information

Work Profile

Contract Detail
Displays the contract type and contract end date.

Pay Details
Displays details relating to your pay such as increment date and FTE.

Pension Scheme
Displays the name of your main pension scheme (Any voluntary contributions can be viewed separately on your payslip).
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Organisation detail
Displays the SAP HR organisational unit and position of the employee.

<table>
<thead>
<tr>
<th>Contract Detail</th>
<th>Pay Details</th>
<th>Pension Scheme</th>
<th>Organisation detail</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Position: Development Officer
Organisation Unit: School A2

SRDS Details
Displays most recent Review/Appraisal details:

<table>
<thead>
<tr>
<th>Contract Detail</th>
<th>Pay Details</th>
<th>Pension Scheme</th>
<th>Organisation detail</th>
<th>SRDS Details</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Appraiser: Mr Edward Summers
Appraisal date: 20.04.2014

HESA Data
HESA is the Higher Education Statistics Agency. HESA collects data for its own analysis as well as government education departments and funding bodies. The University is required to provide detailed information about anyone who is subject to class 1 National Insurance. The level of data displayed in this tab will be dependent on your staff category.

Amending HESA data
It is possible to amend certain data here, depending on your staff category.

If you want to make changes to this screen click the Pencil/Edit icon.
Make the appropriate changes and then either:

Click ‘Save and Back’ to save the changes and go back to the HESA main screen.
Click the Cancel button to cancel your changes.
Training
Displays all training (as recorded on the University’s SAP Training and Events Management system) that you have attended and any future courses you may be booked onto.

Clinical Information
This screen will only be displayed for some Clinical staff if the appropriate information is held on the system.
Responsibilities
Displays any responsibilities that an employee has within their current role. This includes roles such as Leader Manager, Staff Reviewer, Fire Warden, First Aider and various others.

Personal Work Schedule
Displays the work schedule the University has recorded for the individual on SAP. To view a different period, simply change the date. Below is an example of a part-time employee (50% FTE):

Note: If an employee has a change to their contract that includes a change to their work schedule it is very important that Human Resources are informed of the new schedule.

Below is an example of the Personal Work Schedule for a full-time employee:
Multiple Employees
For individuals who hold multiple active contracts of employment with the University a screen will be displayed to select the appropriate contract when accessing the *Working Time* and *Work Information* sections.

The Overview screen will always display the primary Personnel Number near the top of the screen:

When accessing the *Working Time* and *Work Information* sections a dialogue box similar to the one below will be displayed so the individual can select which contract they want to view or amend:

In this example the user has selected the ‘Active LIGHT Central Support’ contract. The screen below now shows the appropriate personnel number (00989850) at the top of the screen: