Manager Self-Service (MSS) Training Guide

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

Introduction ........................................................................................................................................3
The aim of this guide............................................................................................................................3
Assumed knowledge............................................................................................................................3
Terminology ........................................................................................................................................3
Logging in ........................................................................................................................................4
  Important security advice..................................................................................................................5
  Logging Out: ....................................................................................................................................5
  Browser password storage: ...............................................................................................................5
  General Navigation ..........................................................................................................................6
Manager Self Service (MSS) home screen .........................................................................................7
Leave Approval ...................................................................................................................................8
  Selecting and deselecting leave requests .......................................................................................9
  Viewing the detailed leave screen ..................................................................................................9
  Exporting leave request data to Excel ............................................................................................11
Reports ...........................................................................................................................................12
  Running the reports .......................................................................................................................12
  SRDS Reports ................................................................................................................................13
  Personal Work Schedules ...............................................................................................................13
  Absences .........................................................................................................................................14
  Absence Entitlements ......................................................................................................................14
  Training History .............................................................................................................................14
Team View .......................................................................................................................................15
  Staff Profile ....................................................................................................................................16
  Time management on behalf of staff .............................................................................................20
    Current Absences .......................................................................................................................20
Employee Information .......................................................................................................................21
Organizational Information .............................................................................................................23
Position Information ..........................................................................................................................24
Manager Self-Service (MSS) Training Guide

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

Introduction

Manager Self Service (MSS) will allow managers to view and approve annual leave requests and view team calendars, review data relating to their employees including contract types/end dates, SRDS information, work schedules/annual leave quotas, absences, training records, academic qualifications.

Access to MSS is granted to all staff assigned as Chiefs in the SAP HR Organisational Structure.

The aim of this guide

To detail and provide guidance on all functionality available within the University’s Manager Self Service system.

Assumed knowledge

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

Terminology

<table>
<thead>
<tr>
<th>Paid Leave</th>
<th>Annual Leave</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Org (Organisational) unit</strong></td>
<td>Unit defined in the SAP HR Organisational structure e.g. Faculty, School, Department, Team etc.</td>
</tr>
<tr>
<td><strong>Position</strong></td>
<td>Individual work descriptions - distinct &amp; specific e.g. SAP trainer or HR Manager - Faculty of Arts</td>
</tr>
<tr>
<td><strong>Delimit</strong></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.</td>
</tr>
<tr>
<td></td>
<td>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><strong>Maundy Thursday</strong></td>
<td>This is the day before Good Friday. If someone wants to take annual leave on this day, then they need to select the appropriate Leave Type from the list of options e.g. Bank Holiday Hours or Maundy Thursday - Half Day for part-time/full-time staff respectively.</td>
</tr>
<tr>
<td><strong>Collision / Time Overlap</strong></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 informing the user that there is a collision. Quite often the system will show which leave type and date range it is colliding with.</td>
</tr>
<tr>
<td><strong>HESA</strong></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><strong>FTE</strong></td>
<td>Full Time Equivalent.</td>
</tr>
<tr>
<td><strong>Chief</strong></td>
<td>SAP terminology for a manager of an org unit.</td>
</tr>
</tbody>
</table>
Logging in

Self Service uses the same University network (Active Directory) 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 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.

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><img src="overview.png" alt="Overview" /></td>
<td>Return to the Home screen.</td>
</tr>
<tr>
<td><img src="log_off.png" alt="Log off" /></td>
<td>Exit the system (For security purposes, close the browser once you have logged off).</td>
</tr>
<tr>
<td><img src="edit.png" alt="Edit" /></td>
<td>Amend or change an existing record.</td>
</tr>
<tr>
<td><img src="delete.png" alt="Delete" /></td>
<td>Deletes the record</td>
</tr>
<tr>
<td><img src="save_and_back.png" alt="Save and Back" /></td>
<td>Save changes and return to previous screen.</td>
</tr>
<tr>
<td><img src="cancel.png" alt="Cancel" /></td>
<td>Return to previous screen without saving any changes.</td>
</tr>
<tr>
<td><img src="section_tabs.png" alt="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><img src="personal_data.png" alt="Words underlined in blue (links)" /></td>
<td>Click on the link and it will take you to the appropriate screen.</td>
</tr>
<tr>
<td><img src="expand_data.png" alt="Expand Data" /></td>
<td>Click the to display (expand) the data below.</td>
</tr>
<tr>
<td><img src="collapse_data.png" alt="Collapse Data" /></td>
<td>Click the to hide (collapse) the data.</td>
</tr>
<tr>
<td><img src="refresh.png" alt="Refresh" /></td>
<td>Updates the system so any changes can be reflected in the current view.</td>
</tr>
</tbody>
</table>

**Sorting Data** – Data in tables can be sorted. Click on the column name to sort in ascending or descending order. Clicking once will sort in ascending and then clicking a second time will reverse the sort:

- This symbol shows that the 'Position' column has been sorted in descending order.
- This symbol shows that the 'Manager' column has been sorted in ascending order.
Manager Self Service (MSS) home screen

On login the system will default to the Leave Approval overview screen, as shown below:

If a manager is currently viewing their own Employee Self Service (ESS) interface, clicking on the Manager Self Service tab at the top will open MSS.

The default Leave Approval Screen will be displayed when you first log into MSS. Click on the desired option in the left hand menu to view the various screens.
Leave Approval

Any outstanding leave requests awaiting approval will be displayed in this screen. Here you can see there are two requests waiting to be approved:

Click here to display the Leave Approval screen

Click here to select only team members who have absences in the given period.
Selecting and deselecting leave requests
Click to the left of the Leave Request to select the line. To select more than one leave request, hold down the [Ctrl] key whilst clicking to the left of any subsequent requests.

To select or deselect all of the requests, click the icon in the top left hand corner of the grid. You will then have the following options:

By selecting one or more requests the Approve and Reject buttons become active:

To approve or reject a leave request select the request and click the relevant button. Any requests that are either approved or rejected will no longer appear in the list.

Viewing the detailed leave screen
Details of a leave request - including any notes an employee may have provided - can be viewed in more detail by clicking on the link within the request entry, as shown below:

This will open the leave request in a new window.

Note: You may be required to allow pop-ups within your browser for the Self Service website to view the new window.
A screen similar to the image below will be displayed:

If there are multiple leave requests awaiting a response they can be cycled through (and then processed) by using the Previous and Next buttons (if applicable).
Exporting leave request data to Excel

To export the data click **Export** and then click **Export to Microsoft Excel**.

A dialogue box similar to the one below will be displayed. Click **Open** to open the file:

If a dialogue box similar to the following is displayed simply click **Yes** to confirm it is safe to open:
The file will then be displayed:

![保护视图。此文件来自互联网位置，可能不安全。点击获取更多详情。](enable_editing.png)

If you want to edit the file click [Enable Editing] button.

It is recommended that you do this if you want to save the file.

The file can be saved in the normal way using the File menu or the Save icon.

**Reports**

There are a number of reports available within MSS. These can be run for individuals or for all employees that sit within a manager's organisational structure (this is the SAP HR organisational structure, maintained by Human Resources).

Click on the report name to open it. This will be displayed in a new window.

**Note:** You may need to allow pop-ups within your browser for the Self Service system to view the new window.

**Running the reports**

The functionality for each report is structured in a similar format. The report data can be filtered by Employee Selection and Date Range, and additionally the Absence/Absence Entitlement reports allow filtering by absence type. This is done by clicking on the Search icon within the relevant field and selecting the desired type, confirming the selection by clicking ‘OK’ and then clicking the ‘Update List’ button to update the report output.
SRDS Reports

The report can be filtered to include all staff, only those with a review in the specified review period or only those without a review in the period.

To filter the data click on the SRDS Options drop-down list and select the desired option, then click 'Update List'.

Dates for the review period can be selected here.

Personal Work Schedules

All team members will be displayed by default. To select a specific employee click into the drop-down menu, select the desired individual and then click 'Update List'.

The above example shows a full time academic/academic-related work schedule.
Absences

For both Absence reports:

The manager's own absences will be displayed by default. To select a specific employee click into the drop-down menu, select the appropriate individual and then click [Apply].

The reports can be limited to a specific date range and specific absence/quota type(s) by clicking into the From/To fields and selecting the desired option.

Absence Entitlements

Training History

This report will display the training courses that the employee has attended within the date range entered.

To view courses for a different date range, amend accordingly and click Update List.

The report will also display future bookings.
Team View

This is the Team View for a manager. The main screen shows all of the team with some brief details. Any employee birthdays for the current month and any current recorded absences will be displayed in the right hand column.

**Note:** The Team View can be opened in its own window by clicking on the ‘Detailed Team View’ link at the top right of the Team frame.

To view further information relating to an employee click the menu icon to the right of their name:

![Click here to display the menu options](image)

The following menu options will be displayed:

- Staff Profile
- Time Management on Behalf of Staff
Manager Self-Service (MSS) Training Guide
This guide details all functionality available within the University’s Manager Self Service system.

Staff Profile
The Staff profile displays data relating to the selected individual. This will open in a new window. Click the Close button in the top left corner to close the window.

Communication
Displays work-related contact details:

![Communication Details]

Contract Detail
Displays employee contract information:

![Contract Details]

Organisation Detail
Displays the employee's position and organisational unit (from the SAP HR structure):

![Organisation Details]

Pension Scheme
Displays the employee's pension scheme:

![Pension Scheme]

Version 2.2 (10 May 2016)
Addresses
Shows the employee’s current Home and Emergency address and contact details:

![Address Example]

Training
Shows training courses the employee has attended, and also any future bookings:

![Training Example]

The Training data can be filtered within the table:

To sort in Ascending Order / Descending Order click on the appropriate option.

The ‘(User Defined Filter...)’ option allows the user to filter the data by course title. The example below shows a search for any training which contains the word ‘SAP’ in it. The use of the asterisk ‘*’ acts as a wildcard representing any missing characters in the search.
You can see all the courses displayed below contain the word ‘SAP’ in them:

<table>
<thead>
<tr>
<th>Name</th>
<th>Business event</th>
<th>Start date</th>
<th>End date</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAP Navigation Training</td>
<td>SAP_NAV</td>
<td>18.01.2015</td>
<td>18.01.2015</td>
<td></td>
</tr>
<tr>
<td>SAP Finance Reporting</td>
<td>SAP_FIN_REP</td>
<td>28.01.2015</td>
<td>28.01.2015</td>
<td></td>
</tr>
</tbody>
</table>

To revert back to the original view and display all the data, click the column name and then select (All):

Clinical Information

The Clinical Information tab will only display if it is relevant for the member of staff being viewed.
Academic Qualifications
Information will only be displayed here if the University holds qualification data for the employee.

Responsibilities
Displays any responsibilities that the employee has within their current role. This includes roles such as Leader Manager, Staff Reviewer, Fire Warden, First Aider and various others.

SRDS Details
The SRDS Details shows the most recent Staff Review that the employee has received:
Manager Self-Service (MSS) Training Guide
This guide details all functionality available within the University’s Manager Self Service system.

Time management on behalf of staff
The ‘Time Management on Behalf of staff’ option displays the following:

- Create Leave Request
- View Time Account Balance
- Leave Overview

Create Leave Request
The manager can request leave on the employee’s behalf. See the ESS Training Guide for further details on how to do this.

View Time Account Balance
This will display the selected person's holiday allowance and their remaining balance.

Leave Overview

![Leave Overview Screenshot]

If the Current Absences window is collapsed (hidden) then click to expand it and view the data.
Employee Information

Here a manager is able to view further information relating to their staff members. Data on individual employees can be viewed by selecting the relevant row in the table and then clicking the ‘Employee Profile’ button. The Employee Profile will launch in a new window.

Employee Profile

The employee’s absences also can be reviewed here. Clicking on the button within the Absent Days section will allow filtering by absence type and time period. See next page for an example of this.
Clicking on the employee name will bring up a short profile with contact information, from which the manager can create a new email to the employee by clicking on the E-Mail link:

Clicking on the employee’s name will display a ‘Short Profile’ dialogue box.
Organizational Information

Information relating to the organisational units a manager has been assigned to, is displayed here.

The ‘Staffing Information’ view below displays more statistical information, including the number of vacant positions* within the organisational unit(s) in the SAP HR organisational structure.

*The number of vacancies is related simply to the number of empty positions within the organisational unit(s) in the SAP HR organisational structure and NOT an indication of the actual staffing vacancies.
Position Information

Information relating to the positions within the organisational units a manager has been assigned to is displayed here.

If a manager is assigned as the chief of more than one org unit, selecting ‘Positions from Organizational Structure’ from the drop-down menu will allow them to select a specific org unit to view.