

Employee HR and Payroll Self Service (ESS) Training Manual 2019

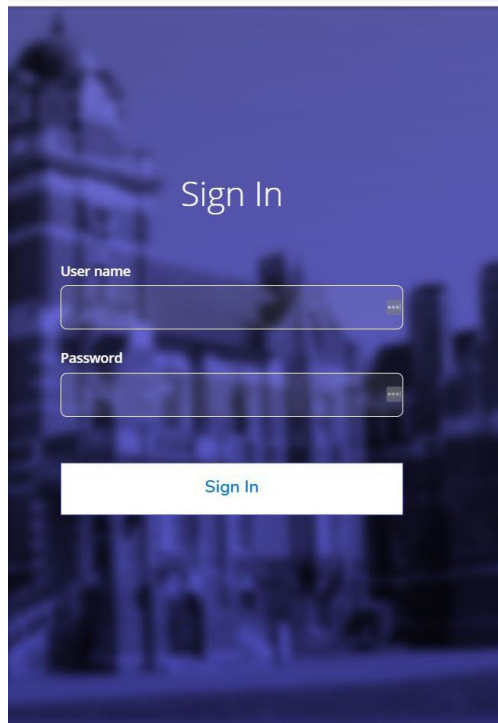


Introduction to Employee Self-Service (ESS)

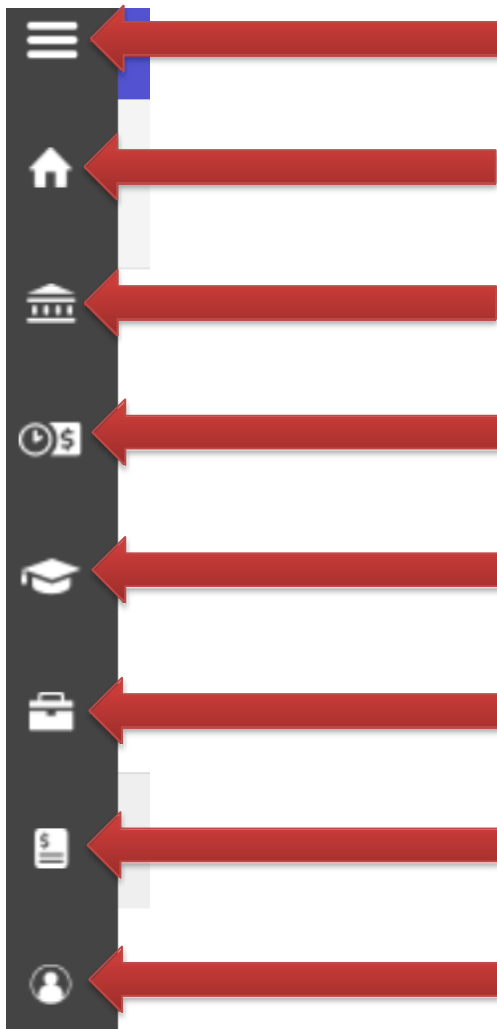
Employee Self-Service is a web-based portal that provides you with visibility to salary and benefit

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 (pay check advice), current and past W-2's, direct deposit information, leave balances, and more. Additionally, if you are a non-exempt employee, this is where you go to enter your time and where supervisors go to approve time for payment.

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.



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.



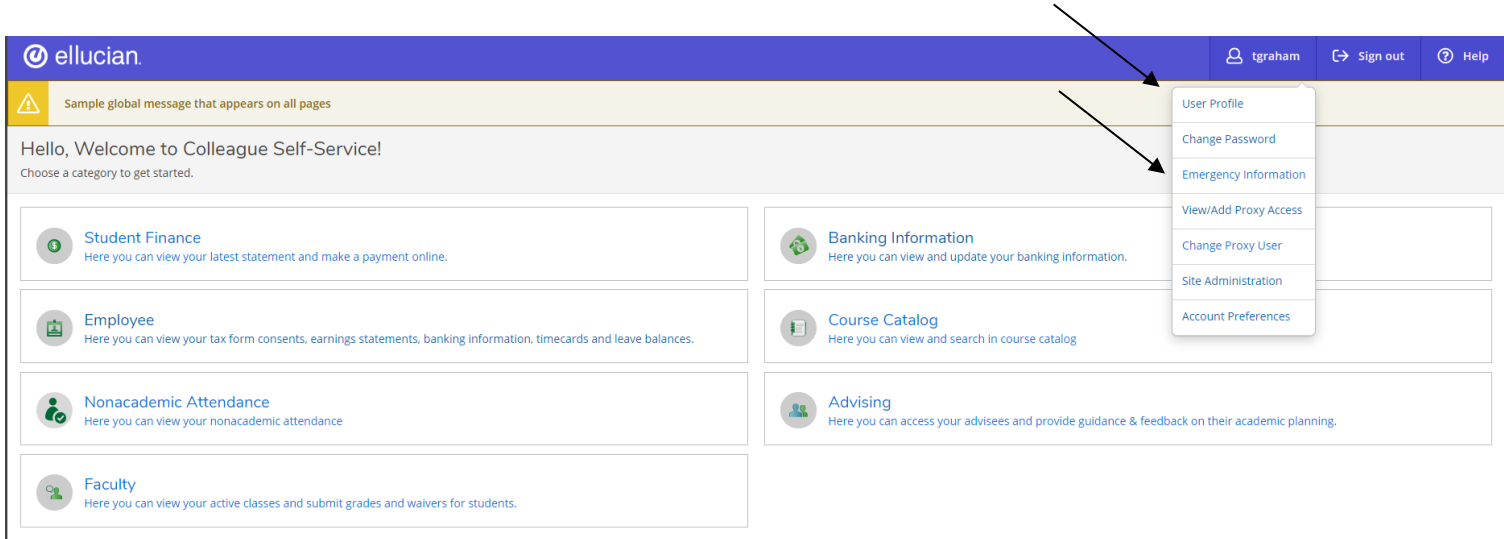
The image shows a vertical sidebar of icons on a dark background. From top to bottom, the icons are: a hamburger menu icon, a home icon, a building icon, a clock with a dollar sign icon, a graduation cap icon, a briefcase icon, a document with a dollar sign icon, and a person icon. Red arrows point from each icon to a corresponding text explanation on the right.

- 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's very important that you keep the information in your User Profile current. While you can view your address and phone number, you can NOT update these items from here; only your emergency contact information can be edited. To change your address or phone number, please contact Human Resources.

You may change your Emergency Information. It is also where you can enter any health conditions in case of an emergency.



The screenshot displays the ellucian self-service portal interface. At the top, a blue header bar contains the ellucian logo on the left and the user name 'tgraham', 'Sign out', and 'Help' on the right. Below the header is a yellow banner with a warning icon and the text 'Sample global message that appears on all pages'. The main content area begins with a greeting: 'Hello, Welcome to Colleague Self-Service! Choose a category to get started.' Below this are several category tiles: 'Student Finance', 'Employee', 'Nonacademic Attendance', 'Faculty', 'Banking Information', 'Course Catalog', and 'Advising'. A dropdown menu is open over the user name 'tgraham', listing options: 'User Profile', 'Change Password', 'Emergency Information', 'View/Add Proxy Access', 'Change Proxy User', 'Site Administration', and 'Account Preferences'. Two black arrows point from the text above to the 'User Profile' and 'Emergency Information' options in the dropdown menu.

Accessing Employee Features within ESS

Click on the tab labeled "Employee".

Hello, Welcome to Colleague Self-Service!
Choose a category to get started.

- Student Finance**
Here you can view your latest statement and make payment online.
- Employee**
Here you can view your tax form consents, earnings statements, banking information, timecards and leave balances.
- Nonacademic Attendance**
Here you can view your nonacademic attendance.
- Faculty**
Here you can view your active classes and submit grades and waivers for students.
- Banking Information**
Here you can view and update your banking information.
- Course Catalog**
Here you can view and search in course catalog.
- Advising**
Here you can access your advisees and provide guidance & feedback on their academic planning.

This is where you will find any and all information related to Taxes, Time Entry, Earning Statements, Leave Balances, Banking Information, Position History, Stipend History, Total Compensation, Time History, Time Approval and Employee Proxy.

Sample global message that appears on all pages

Welcome to Colleague Employee Self-Service!

- Tax Information**
Here you can change your consent for e-delivery of tax information.
- Time Entry**
Here you can fill out your timecards.
- Earnings Statements**
Here you can view your earnings statement history.
- Employee Proxy**
Here you can delegate certain types of work tasks to another employee.
- Time History**
Here you can view your paid timecards.
- Position History**
Here you can view a list of your positions.
- Total Compensation Statement**
Here you can view your Total Compensation Statement.
- Banking Information**
Here you can view and update your banking information.
- Time Approval**
Here you can approve or reject timecards for the people you supervise.
- Faculty Contracts**
Here you can view your contract assignment details.
- Leave**
Here you can view your leave balances.
- Time History (Supervisor)**
Here you can view paid timecards for the people you supervise.
- Stipend History**
Here you can view a list of your stipends.

Employee Tax Information – W2’s

To view your Tax information click on the “Tax Information” box.



Tax Information

Here you can change your consent for e-delivery of tax information.

In this area you can set your preference for receiving your W-2. If you wish to receive them electronically then you can choose:

- Receive my W-2 only in electronic format or
- Withhold my consent and get your W-2 on paper.

Tax Information

[W-2 Information](#) [1095-C Information](#) [1098 Information](#)

Select an option below to set your preferences for receiving your electronic W-2:

Receive my W-2 only in electronic format

i By selecting this option, I agree to receive my official W-2 only in electronic format. I understand that by consenting to receive my W-2 in electronic format, I will not receive a paper W-2 statement. I understand that by consenting I will have access to view and print all of my prior, current and future W-2 statements until I remove my consent. I understand that I have the ability at any time to return to this form and remove my consent.

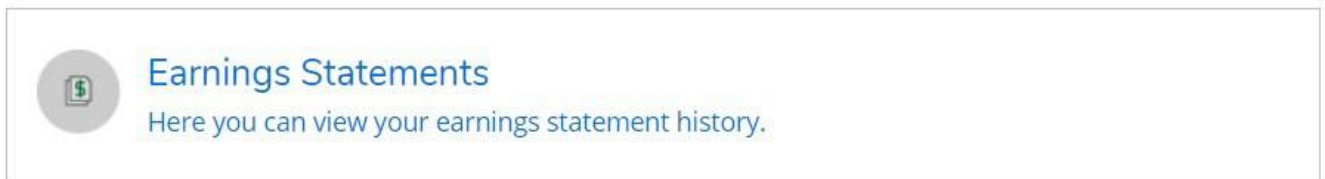
Withhold my consent

U I choose to withhold my consent and understand by doing so that I will not receive my official W-2 in electronic format. I also understand that by withholding my consent, I will not have access to prior or future W-2 statements electronically. I understand that I have the ability at any time to return to this form and consent to view my W-2 statements electronically.

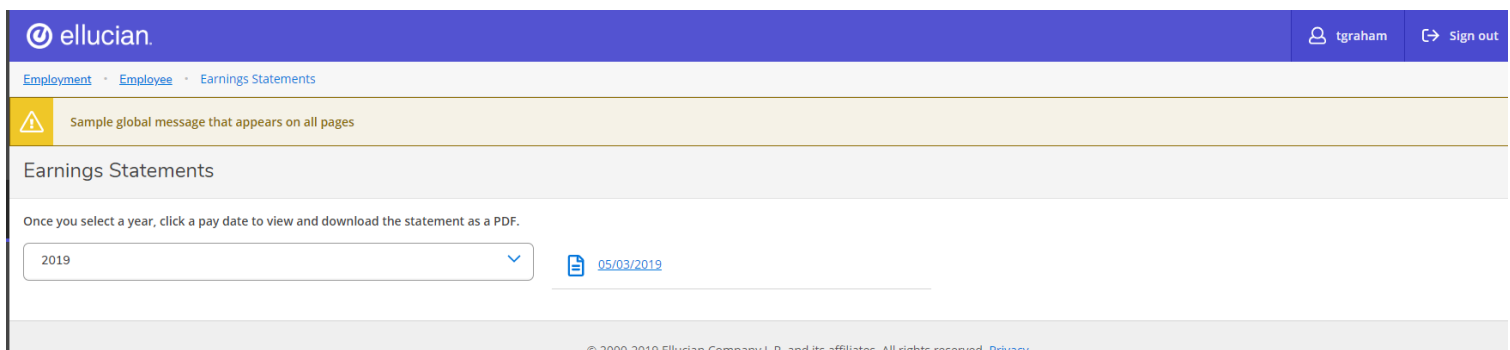
W-2 Statements		Electronic W-2 Consent History	
Tax Year	Notation	Date	Consent Status
		4/24/2019 1:28:25 PM	Consent Given

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.



Employee Leave Balances

In this area you will be able to view your Vacation and Sick/Personal balances. Click on "Leave".



Leave


Here you can view your leave balances.

Notice you can view what you have used and your overall balance in the graphic at the top of the screen. Details about accrual earnings, usage and adjustments are found below.

Leave

Leave Balance


Academics



Vacation (Hours)

0.00	109.00
Used	Balance

Sick



Sick (Hours)


0.00	76.00
Used	Balance

Leave - As Of 9/20/2019

Description	Starting Balance	Earned	Used	Adjustments	Balance
Vacation	109.00	0.00	0.00	0.00	109.00
Comp Time	0.00	0.00	0.00	0.00	0.00
Sick Leave - Hourly Biweekly	0.00	76.00	0.00	0.00	76.00
Floating Holiday	0.00	0.00	0.00	0.00	0.00

Time History for Employee

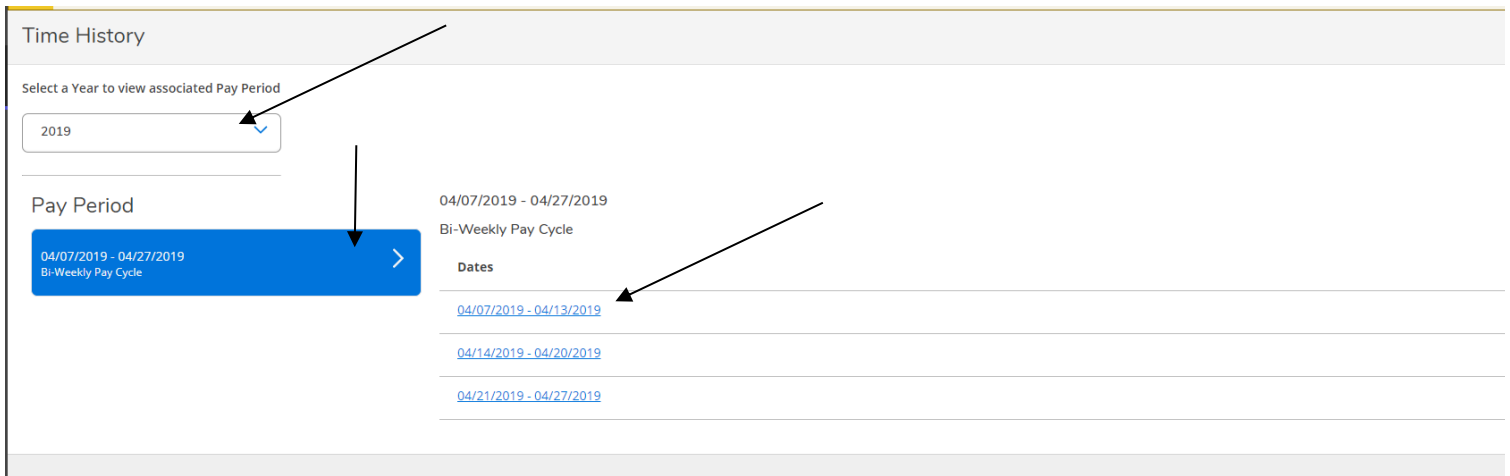
Select Time History



Time History

Here you can view your paid timecards.

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 time card by clicking the date range on the right side of the screen.



The screenshot shows the 'Time History' interface. At the top, there is a header 'Time History'. Below it, a section titled 'Select a Year to view associated Pay Period' contains a dropdown menu currently set to '2019'. An arrow points to this dropdown. Below the year selection is a 'Pay Period' section. It features a blue button with the text '04/07/2019 - 04/27/2019 Bi-Weekly Pay Cycle' and a right-pointing chevron '>'. An arrow points to this button. To the right of the button, the text '04/07/2019 - 04/27/2019 Bi-Weekly Pay Cycle' is displayed. Below this, a 'Dates' section lists three date ranges: '04/07/2019 - 04/13/2019', '04/14/2019 - 04/20/2019', and '04/21/2019 - 04/27/2019'. An arrow points to the first date range.

Time Entry and Approval

Employee Time Entry

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

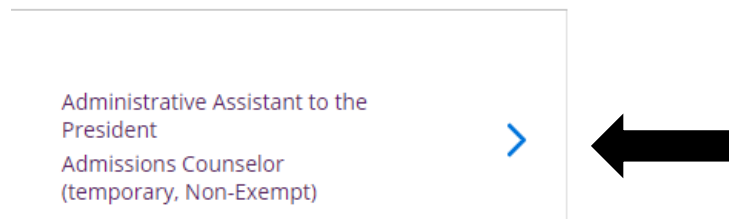


1. Select the pay period and click the blue arrow on the far right to open the timesheet.

In this example, the person has one job.

07/07/2019 - 07/13/2019 Due by: 8/19/2019 11:00 AM Total: 40.00 Hours	Submitted	Clerk, Ap Long Title	>
07/14/2019 - 07/20/2019 Due by: 8/19/2019 11:00 AM Total: 40.00 Hours		Clerk, Ap Long Title	>
07/21/2019 - 07/27/2019 Due by: 9/2/2019 11:00 AM Total: 40.00 Hours	Approved	Clerk, Ap Long Title	>
07/28/2019 - 08/03/2019 Due by: 9/2/2019 11:00 AM Total: 64.00 Hours	Approved	Clerk, Ap Long Title	>
09/15/2019 - 09/21/2019 Due by: 10/28/2019 11:00 AM Total: 0.00 Hours		Clerk, Ap Long Title	>

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



- Enter Time Worked. Some positions require detailed time entry, others only summed hours per day. Your time will save automatically. There is a Save button but you don't really need it.

Summary time entry view

Pay Period 09/15/2019 - 09/28/2019
[All Time Sheets](#)

Week 09/15/2019 - 09/21/2019
 40.00 Total hours

Saved at 1:52 PM [Save](#) [View Leave Balances](#)

ZAPMA62102CLER • Clerk, Ap Long Title
 Ingram, Vikki L. • AP Manager • Main Campus
 46.00

Earn Type	Sun 9/15	Mon 9/16	Tue 9/17	Wed 9/18	Thu 9/19	Fri 9/20	Sat 9/21	Total
Work Schedule							0.01	0.01
Regular Pay		8.00	8.00	8.00	8.00	8.00		40.00
+ Additional Time								
Position Total Hours:	0.00	8.00	8.00	8.00	8.00	8.00	0.00	40.00

[Comments](#) [Submit for Approval](#)

Detail time entry view (time in and out)

To

Week 09/22/2019 - 09/28/2019
 39.50 Total hours

Saved just now [Save](#) [View Leave Balances](#)

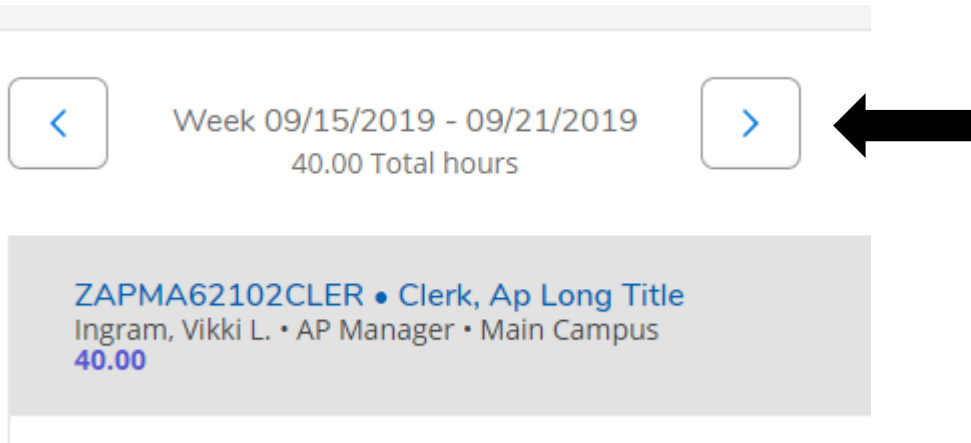
ZAPMA62102CLER • Clerk, Ap Long Title
 Ingram, Vikki L. • AP Manager • Main Campus
 39.50

Earn Type	Sun 9/22	Mon 9/23	Tue 9/24	Wed 9/25	Thu 9/26	Fri 9/27	Sat 9/28	Total
Work Schedule							0.01	0.01
Regular Pay	00:00 AM	8:00 AM	8:00 AM	9:00 AM	00:00 AM	8:00 AM	00:00 AM	31.50
	00:00 AM	12:00 PM	11:30 AM	4:30 PM	00:00 AM	12:00 PM	00:00 AM	
		1:00 PM	12:30 PM	+		1:00 PM		
		5:00 PM	5:00 PM			5:00 PM		
		- +	- +			+		
Sick					8.00			8.00

[Remove Sick](#)

/

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.



Week 09/15/2019 - 09/21/2019
40.00 Total hours

ZAPMA62102CLER • Clerk, Ap Long Title
Ingram, Vikki L. • AP Manager • Main Campus
40.00

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.



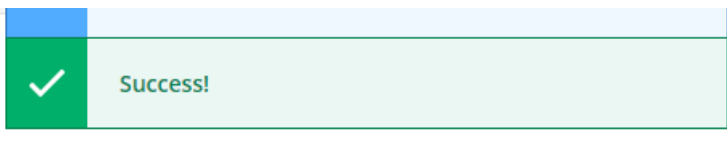
Week 09/15/2019 - 09/21/2019
40.00 Total hours

Position Total Hours:

0.00	8.00	8.00	8.00	8.00	8.00	8.00	0.00	40.00
------	------	------	------	------	------	------	------	-------

Buttons: + Additional Time, Comments, Submit for Approval, Saved, Save, View Leave Balances


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.

Position Total Hours: 0.00 5.0

Comments Return Timecard to Edit



Entering in Vacation/Sick or other Leave Time

1. From your timecard, Select "+ Additional Time".

Pay Period 09/15/2019 - 09/28/2019

< All Time Sheets

< Week 09/15/2019 - 09/21/2019 40.00 Total hours >

Saved at 1:52 PM Save View Leave Balances


ZAPMA62102CLER • Clerk, Ap Long Title
Ingram, Vikki L. • AP Manager • Main Campus
40.00

Earn Type	Sun 9/15	Mon 9/16	Tue 9/17	Wed 9/18	Thu 9/19	Fri 9/20	Sat 9/21	Total
Work Schedule							0.01	0.01
Regular Pay		8.00	8.00	8.00	8.00	8.00		40.00


+ Additional Time

Position Total Hours: 0.00 8.00 8.00 8.00 8.00 8.00 0.00 40.00

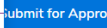
Comments Submit for Approval



2. Select the earnings type you wish to enter

Earn Type	Sun
Regular Earnings	<input type="text"/>
Choose Earn Type 	

Sick/Personal	
Vacation	
Jury Duty	
Funeral	
Personal Time	
Holiday/Weather Closing	



Enter the number of hours on the day of the week in which you took the leave. For this example, we will select funeral leave. Enter the number of hours. You can add other leave types by clicking “+ Additional Time” and repeating the process. Once you are done, you may exit the timecard (remember your time saves automatically) or you can click Save. If you have finished entering time for the pay week, click “Submit for Approval”.

Pay Period 09/15/2019 - 09/28/2019
[All Time Sheets](#)

Week 09/15/2019 - 09/21/2019
 40.00 Total hours

Saved at 1:52 PM Save View Leave Balances

ZAPMA62102CLER • Clerk, Ap Long Title
 Ingram, Virki L. • AP Manager • Main Campus
 40.00

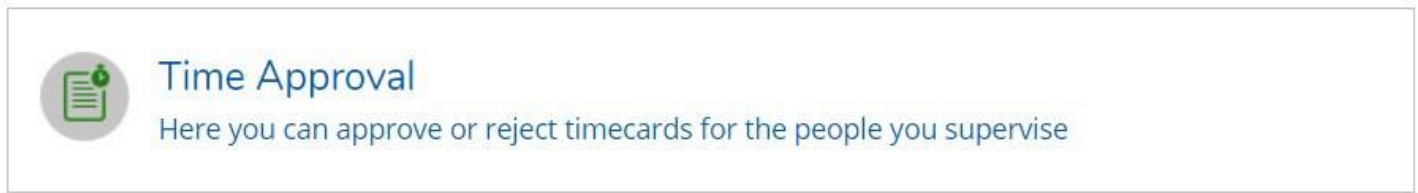
Earn Type	Sun 9/15	Mon 9/16	Tue 9/17	Wed 9/18	Thu 9/19	Fri 9/20	Sat 9/21	Total
Work Schedule							0.01	0.01
Regular Pay		8.00	8.00	8.00	8.00	8.00		40.00
Position Total Hours:	0.00	8.00	8.00	8.00	8.00	8.00	0.00	40.00

+ Additional Time

Comments Submit for Approval

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.

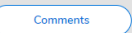



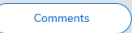
All of the employees that you are a time approver for will show up in one list.

Timecards

Pay Period Ending 09/28/2019 Bi-Weekly Pay Cycle Due by: 10/29/2019 5:00 PM	Total Hours	Regular Hours	Overtime Hours	Additional Hours	
Graham, Riley - 0005364 09/15/2019 - 09/28/2019 No Time Entered					Approve Reject Comments
∨ Total Hours	0.00	0.00	0.00	0.00	
Simpson, Major - 0005366 09/15/2019 - 09/28/2019 No Time Entered					Approve Reject Comments
∨ Total Hours	0.00	0.00	0.00	0.00	

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.

Timecards

Pay Period Ending 09/28/2019 Bi-Weekly Pay Cycle Due by: 10/29/2019 5:00 PM	Total Hours	Regular Hours	Overtime Hours	Additional Hours				
Graham, Riley - 0005364 09/15/2019 - 09/28/2019 No Time Entered								
 Total Hours	0.00	0.00	0.00	0.00				
Simpson, Major - 0005366 09/15/2019 - 09/28/2019 No Time Entered								
 Total Hours	0.00	0.00	0.00	0.00				

You can click on the dates next to the employee to view 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.

Pay Period Ending 09/28/2019
Bi-Weekly Pay Cycle
Due by: 10/29/2019 5:00 PM

Graham, Riley - 0005364 [09/15/2019 - 09/28/2019](#)

Time Approval - Graham, Riley
[< Time Approval](#)

Week 09/15/2019 - 09/21/2019 0.00 Total hours Not Complete >

Saved Save Other Actions Approve

ZCRIMADMASST • Administrative Assistant
Graham, Tracy • Criminology • Main Campus
0.00 | Not Complete

Earn Type	Sun 9/15	Mon 9/16	Tue 9/17	Wed 9/18	Thu 9/19	Fri 9/20	Sat 9/21	Total
Work Schedule	0.00	8.00	8.00	8.00	8.00	8.00	0.00	40.00
Regular Pay	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	0.00
	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	
+ Additional Time								
Position Total Hours:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

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.

Time Approval - Graham, Riley

< Time Approval

Week 09/15/2019 - 09/21/2019
0.00 Total hours
Not Complete

Saved Save Other Actions Approve

ZCRIMADMASST • Administratice Assistant
Graham, Tracy • Criminology • Main Campus
0.00 | Not Complete

Earn Type	Sun 9/15	Mon 9/16	Tue 9/17	Wed 9/18	Thu 9/19	Fri 9/20	Sat 9/21	Total
Work Schedule	0.00	8.00	8.00	8.00	8.00	8.00	0.00	40.00
Regular Pay	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	0.00
	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	
+ Additional Time								
Position Total Hours:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

If your employee forgets to add leave to their timecard, you can add it for them or reject the timecard, sending it back for them to edit. Click "+ Additional Time" to edit time.

After you click on "+ Additional Time" choose the description that matches the time you need to enter for the employee. Key in the hours on the date the leave was used.

Time Approval - Graham, Riley

Week 09/15/2019 - 09/21/2019
0.00 Total hours
Not Complete

ZCRIMADMASST • Administrative Assistant
Graham, Tracy • Criminology • Main Campus
0.00 | Not Complete

Earn Type	Sun 9/15	Mon 9/16	Tue 9/17	Wed 9/18	Thu 9/19	Fri 9/20	Sat 9/21	Total
Work Schedule	0.00	8.00	8.00	8.00	8.00	8.00	0.00	40.00
Regular Pay	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	0.00
	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	00:00 AM	

+ Additional Time

Position Total Hours: 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00 0.00

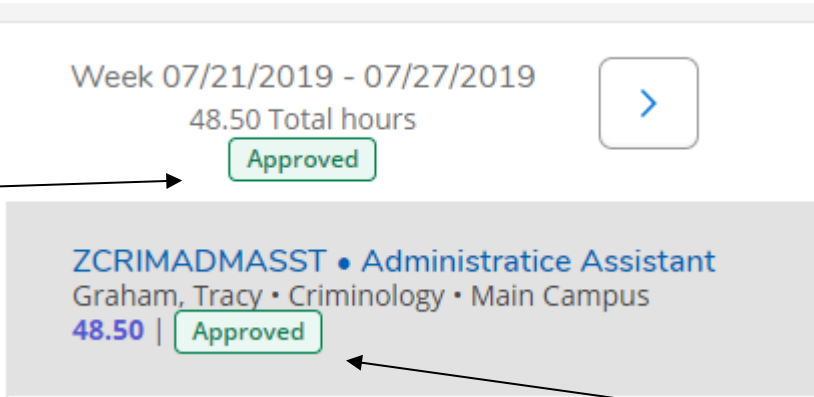
Holiday

On Call

After you add the additional time, if you need to remove it you can click on "Remove".

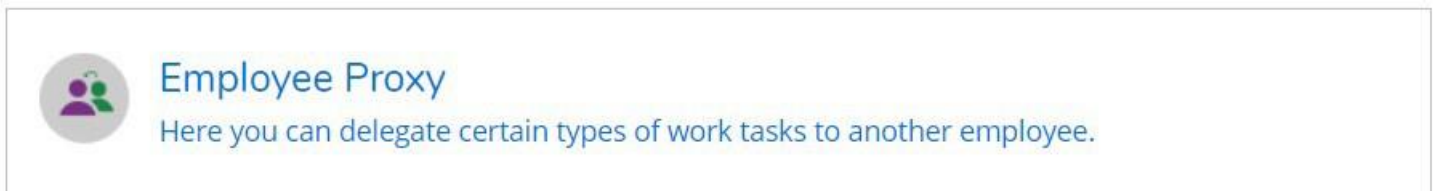


Once you have approved the timecard, green "Approved" boxes will appear and you are done with the employee.



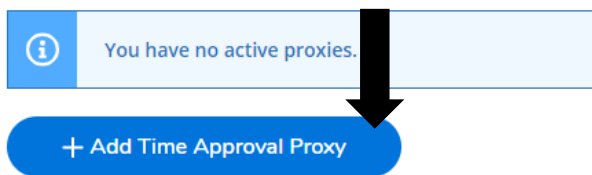
Set up a Timecard Proxy Approver

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



Click "+ Add Time Approval Proxy"

Add 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.

Add Time Approval Proxy

Employee Search

Search input: peggy burns

0000022
Ms. Peggy X. Burns



Cancel

Add Proxy

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

Employee Proxy

Add Proxy

Employee	Proxy Access	Effective Date	End Date	
 Lise Simpson	Time Approval	7/10/2019		
 Ms. Peggy X. Burns	Time Approval	7/24/2019		



+ Add Time Approval Proxy

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Time History for Supervisor



Time History (Supervisor)

Here you can view paid timecards for the people you supervise.

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

Time History (Supervisor)

Financial Information

Search for Employee

Employee Name or ID



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 time card by clicking the date range on the right side of the screen.

Select a Year to view associated Pay Period

2019



Pay Period

07/28/2019 - 08/10/2019
Bi-Weekly Payroll



07/14/2019 - 07/27/2019
Bi-Weekly Payroll



06/30/2019 - 07/13/2019
Bi-Weekly Payroll



06/16/2019 - 06/29/2019
Bi-Weekly Payroll



07/28/2019 - 08/10/2019

Bi-Weekly Payroll

Dates

[07/28/2019 - 08/03/2019](#)

[08/04/2019 - 08/10/2019](#)

Logging Off

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

