Employee Self Service (ESS)

Presented by: Carol Livingston

**Employee Self Service (ESS)**

- **Trends in Self Service and Mobile Apps**
  - Paychex Whitepaper – In 2010, 80% American use Internet – more geographically diverse and tech savvy
  
  - Ceridian Whitepaper – In 2015, trends include:
    - unified, mobile, cloud-based Human Capital Mgmt systems
    - Tipping point for SaaS corporate systems
    - Payroll and workflow management are hot topics

  
  - Pew Research Center – In 2015, largest workforce is Millennials and they are changing the workforce – most tech savvy, digital sixth sense, multi-tasking, wired and connected 24x7

  
  - Online is more commonplace – shopping, banking, relationships, travel, RE research, university, tax filing
Employee Self Service (ESS)

• What is Employee Self Service?

- Web client
- Outlook

MS Dynamics GP Employee Self Service by version

<table>
<thead>
<tr>
<th>EMPLOYEE SELF SERVICE</th>
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</thead>
<tbody>
<tr>
<td>Dynamics GP 2013 R2</td>
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<tr>
<td>Purchase Requisition</td>
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<tr>
<td>Payroll Timecard</td>
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<tr>
<td>Project Timesheet</td>
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Workflow 2.0

RG Connect 2016 Breakthrough to Excellence
What is in GP 2013 R2 vs. GP 2015 R2

- **GP 2013 R2**
  - Purchase Requisition
  - Project Time and Expense
  - Enter timecards with approval workflow
  - Enter time on behalf of a user

- **GP 2015 R2**
  - View and Edit Employee Profile
  - Employee Paystubs
  - W4 withholding
  - Direct Deposit
  - Employee Benefits
  - Employee Skills and training
  - Print W2 form
  - Manager Team views

Employee Self-Service

- Web client users login with Windows login
- Business Portal and PDK Replacement (by GP2015)
- Mobile App – Time Management (Windows Tablet or PC, Apple, Android)
- GP2016 – HTML 5 (IE, Chrome, Safari, Edge) and Multi-device (Windows, iPad, Android)
Employee Self-Service

• New Employee Service User Type

• New ESS Security Roles – Employee and Manager

ESS Home Page

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Breakthrough to Excellence
**Purchase Requisition**

PURCHASE REQUISITION
- Replace existing Req Management
- Order items and goods
- Combine requisitions to a single PO
- Requisition Workflow

**Time Management**

Time Management
- Self-Service User
- Business Portal Time & Attendance Replacement
- Allows Entering ‘Time on Behalf Of’
- Approval Workflow
**Project Time and Expense**

**Employee Profile and Workflow**
Employee Paystubs

An employee can view or print their paystubs from the paystubs navigation list.

Employee Benefits View

Employee can view their benefits with employer and employee contributions.
**Employee Skills and Training**

**Employee Skills and Training & Workflow**

View and maintain employee's education and tests

Employee can view skills and training history

**W-4 View and Workflow**

**Employee W4 & Workflow**

Edit W4 information, add or change additional withholding, and update deductions

With workflow, route the W4 information to the desired users
**View W-2**

View W2 for ESS

With Employee Self Service W2, the employee can now view and print their own W2.

The action will display on the Time Management home page part.

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**Time Management App (Salary only)**

The Time Management app will allow GP Employees to enter Vacation and Sick time in Payroll or time off against Benefit Timecodes within HR.

The app is available for Windows 8, iOS iPad devices, and Android tablets.
Manager Team View

MANAGER TEAM PROFILE
Manager able to view and edit their team members data
Address, Dependents, Emergency Contacts and Position History

Manager Approval – Nav List

HRP PENDING APPROVAL NAV LIST
Navigation list for HRP Workflow Approvers
Displays all workflow tasks assigned to user for HRP Workflows
Complete workflow actions across active workflows

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Breakthrough to Excellence
**What is in GP2016 – Web Client**

**Feature of the Day**

**HTML Web Client**

- Any Browser
- Device Specific
- Enhanced UI

**Optimized for your role**

**ESS, Workflow, Web Client**

- Demo
**Benefit Self Service Prerequisites**

- Link Employee to User
- Employee Self Service
- Advanced HR or Extended Pack (if want to use Benefit Self Service)
- Web Client or Traditional Client (workstation)

**Benefits Self Service**

- Human Resource is not required; you can link directly to Payroll Benefit / Deduction codes.
- You can set validations that state you have to enroll in this plan prior to enrolling in the "higher" plan, like a prerequisite. This happens a lot with Life Insurance.
- Easier integration to Microsoft Excel for reporting purposes.
- You can separate out your health enrollments easier, such as Dental, Health, Vision (key for ACA!!)
- An improved Benefit Enrollment period window so you can easily roll out enrollment to a large group of employees or single onboarding.
Benefits Self Service

• Ability to attach multiple plan documents to a benefit, including Adobe Acrobat pdf's and Microsoft Word documents.

• User defined enrollment information

• You can now "return" the benefit enrollment back to an employee instead of having to delete it out, we now give you both options, awesome, who wants to re-key!

• More flexibility during the posting process for what benefits you want to post at a time, easier to administer.
Enrollment status list and action list

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Select records and export to Excel

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Breakthrough to Excellence
Planning for Employee Self Service on Web Client

- Need Web Components (IIS Web Site, Session Host/Service/Central Service, MS Dynamics GP Web Client runtime, Web Management Console)
- Plan for Deployment options (Single Machine, Scale out, Multitenant)
- Web Client Security Prerequisites (Security Groups, User Accounts)
- Web Client Server Software
- Web Client Security Certificates and SSL

Web Client and ESS Gotchas

- ESS Roles need to scripted for GP 2013 and GP 2015
- Setup or import Self Service Users (if large number – need script for import into SQL)
- ESS Manager can only view My Team - Employee Profile and Skills and Training
- Integration Manager not available for GP 2013 and GP 2015
- Third Party challenges with web client (Mekorma MICR, Integrity Data Email Suite)
Resources:

- Benefits Self Service
  https://www.youtube.com/watch?v=gSl3ANOZZAE&feature=youtu.be
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  https://www.youtube.com/watch?v=d0GPhYW07gk

Thank you!