QSS/OASIS Webinar

Employee Self Service (ESS)

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Agenda

- Why Web Apps?
- Why Employee Self Service?
- The ESS End-User Experience (demo)
- Setup and Administration
  - Requirements
  - Users and Security
  - Customization
- Development Roadmap
- Q&A

Why Web Apps?

- **Works everywhere**
  - No specific operating system
  - No pre-installed client software
- **Familiar to most people**
  - Less training required
- **Centralized Administration**
  - Easier to manage and control
- **Secure**

Why Employee Self Service?

- Without ESS:
  - User -> Phone/Email -> HR person -> Information
  - Business hours only
- With ESS:
  - User -> Their Computer -> Information
  - 365x7x24xEverywhere
  - Offers additional capabilities
    - Paperless operations, etc.

Employee Self Service

DEMO

Benefits of ESS

- Improve service and information available to employees

- Reduce time spent by Human Resources and Payroll staff answering employees' questions

- Improve the accuracy of employees' records

Benefits of ESS (cont.)

- Web based
  - □ no PC/client software to install/maintain
  - □ Internet Explorer, Firefox, Chrome
- Integrated with QSS/OASIS
  - □ Authentication
  - □ "Live" employee data
  - □ Config. data

Benefits of ESS (cont.)

- Easy, secure (HTTPS) access to employees' data from:
  - Desktop, kiosk, home
- Context-aware help
- Easy to customize and configure
  - Config via GUI, not separate files
  - Changes take effect immediately – no need to re-login

Benefits of ESS (cont.)

- Ability for certain users to see other employees' data:
  - □ "Group" supervisor
  - □ Right granted to user to see employees within own district
  - □ Right granted to user to see employees in different districts

Benefits of ESS (cont.)

- **QSS Support**
  - ☐ Eight hours of ESS installation and training bundled with purchase
  - ☐ We install ESS and Minisoft ODBC
  - ☐ Assist with security, AD and misc. config.
  - ☐ Quick problem resolution
  - ☐ Online, up-to-date documentation

ESS Getting Started Manual

- A guide and reference for the new ESS system administrator

- 80+ pages, many screen-shots, regularly updated

ESS Manual Contents

- Getting Started
- What has been Installed?
- Starting / Stopping ESS
- Customization Features
- Users, Logging-in, Registration
- Security, Roles, Groups

ESS Manual Contents (cont.)

- General Configuration
- Multi-district / County Office Considerations
- Active Directory Integration
- Using the Employee Finder
- Absence Tracking

ESS Manual Sample Page

Figure 1-3, Current District

The displayed district (40 above) is first clicked to reveal the list of districts, and then a district from that list can be selected. If no district is chosen, the original district can be clicked again to hide the drop-down list. This list is populated based on the logged-in user's role(s). Section 8, Multi-district / County Office Considerations, describes how to set up multiple districts.

The ADMIN User

The ADMIN user is special in that it has no roles, has full access to all ESS features, and cannot be deleted. This user is created when ESS is first installed. The ADMIN login name and password are the same as for QCC. Most of the screen shots in the rest of this document were captured when the logged-in user was "admin", and thus the top-right menu appears as below (where "admin" is highlighted).
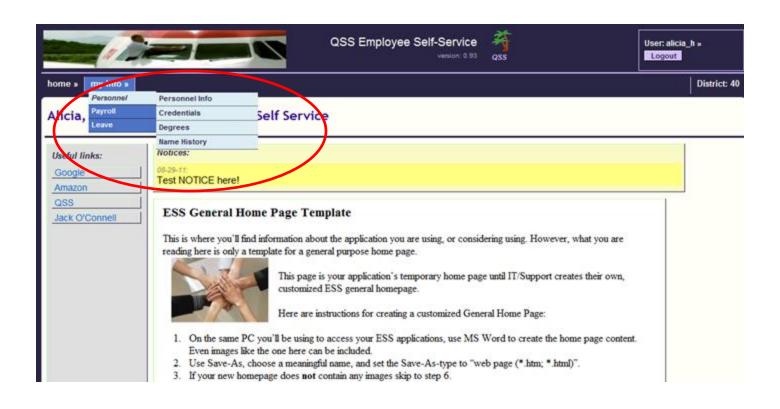
ESS Requirements

- Linux server – RedHat, SUSE
  - Often provisioned to become the version-L server, can be separate if desired
- MS SQLServer or PostgreSQL database
- Minisoft ODBC driver for Version H
- QSS access to Linux and db servers
- Client browsers – IE 8+, FireFox, Chrome

End-user Perspectives

- Ordinary users see only their own data
  - Personnel info, pay, leave, W2, credentials, degrees, name history
  - Data screens above can be hidden
  - No ability to see data for other employees
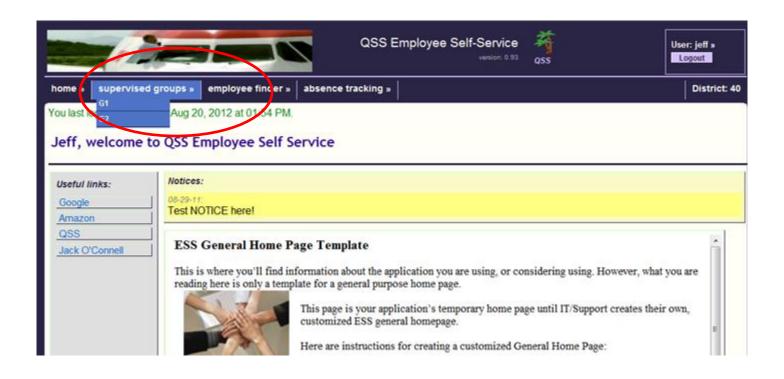 - Can't alter any ESS settings

End-user Perspectives – Ordinary User

End-user Perspectives (cont.)

- Group supervisor: a user who is a supervisor of an employee group:
    - Access to same employee data
    - Restrict viewable screens per group
    - Grant access to data of employees supervised by members of supervisor's group, ex:
        - S1 supervises G1, S2 belongs to G1 and supervises G2: S1 can be permitted to see members of G2 – not default
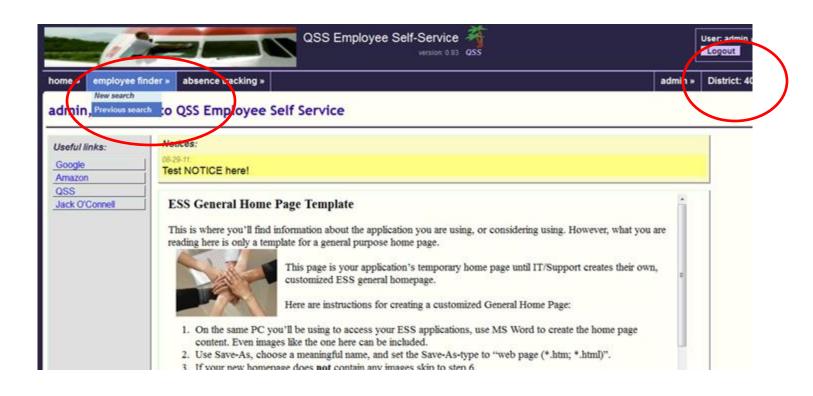
End-user Perspectives – Group Supervisor

End-user Perspectives (cont.)

- "Power user": a user assigned 1 or more higher powered rights:

    - ☐ Right to see employees within own district

    - ☐ Right to see employees in own and other districts

    - ☐ These rights should not be assigned to a "default" role

End-user Perspectives – "Power" User

ESS User-types

- Staff users:
  - Regular district employees (w/o QCC access)
- QCC users:
  - Users with access to QCC
  - QCC authentication used to access ESS
  - Must have Emp-No set for the QCC user id
- Guest users:
  - Non-employees
  - Can be disabled

ESS Users (cont.)

- Default role per user-type
- Same user for all QSS web apps, but
  - Roles are app-specific
- Active Directory (AD) login available
- Auto-registration for QCC users
- Explicit registration for Staff / Guests
  - Must register even if using AD login

ESS Users (cont.)

- **Staff / Guest passwords local to ESS**
  - ☐ Many password rules available
    - Password hints, one-use passwords, etc.
  - ☐ All passwords are 1-way encrypted
    - Admin. cannot see passwords
- **QCC user passwords managed in QCC**

Security –
Rights, Roles, Groups

- Rights:
  - Permissions / "capabilities" which control features of ESS
  - Assigned to one or more roles
  - Ex.: "PersData" if set, allows user to see any employee in same district

Security (cont.)

- Roles:
  - ☐ Collection of rights
  - ☐ Assigned to one or more users
  - ☐ Can assign multiple roles to a single user
  - ☐ District specific
  - ☐ App specific
  - ☐ All roles are defined by customer
  - ☐ Default role can be set per user-type

Security (cont.)

- Groups:
  - District-specific collections of employees
  - Assigned one or more "supervisors"
  - Assigned ESS emp data screens
  - Group supervisor automatically has access to the designated screens for all group members
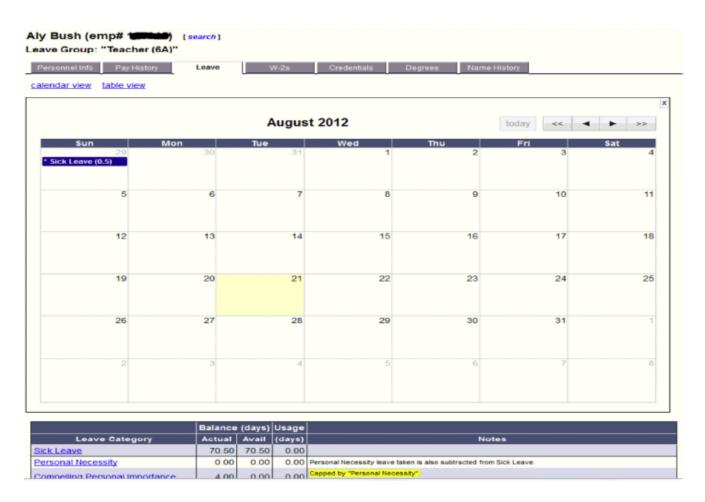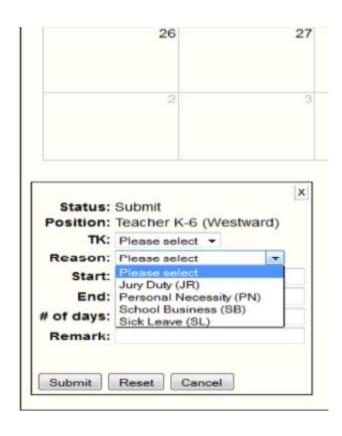
Adding a Group

Absence Tracking

- Bundled with ESS, initially disabled
- End-user can request / record leave activity via leave calendar
- Time-keeper notification and approval
- Export to QSS/OASIS leave module
- Many configuration options

Absence Tracking – Leave Calendar

Absence Tracking – Leave Request

Absence Tracking – Adding a Time-keeper

Absence Tracking – Configuring Absence Reasons

Absence Reasons:

AR	Enable ☐	Display Name	DB Name	Show activity ☐	Show LV req ☐	AR type
A0	☑	Accrual Bucket 0	Accrual Bucket 0	☑	☐	? ▾
A1	☑	Accrual Bucket 1	Accrual Bucket 1	☑	☐	? ▾
A2	☑	Accrual Bucket 2	Accrual Bucket 2	☑	☐	? ▾
A3	☑	Accrual Bucket 3	Accrual Bucket 3	☑	☐	? ▾
A4	☑	Accrual Bucket 4	Accrual Bucket 4	☑	☐	? ▾
A5	☑	Accrual Bucket 5	Accrual Bucket 5	☑	☐	? ▾
A6	☑	Accrual Bucket 6	Accrual Bucket 6	☑	☐	? ▾
A7	☑	Accrual Bucket 7	Accrual Bucket 7	☑	☐	? ▾
A8	☑	Accrual Bucket 8	Accrual Bucket 8	☑	☐	? ▾
A9	☑	Accrual Bucket 9	Accrual Bucket 9	☑	☐	? ▾
AC	☑	Admin Cpi	Admin Cpi	☑	☐	? ▾
AP	☑	Admin Pn	Admin Pn	☑	☐	? ▾
AS	☑	Admin Sick Leave	Admin Sick Leave	☑	☑	Usage ▾
AD	☑	Administrative Leave	Administrative Leave	☑	☐	? ▾

ESS Live Discussion

- Customization
- Security and Groups
- Users
- Configuration
- Leave config.
- Absence tracking config.
- Q & A