



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

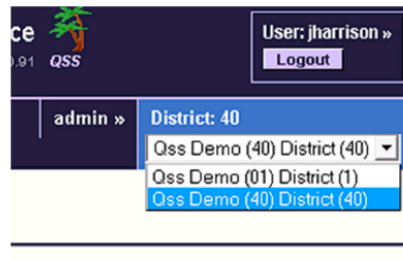


Figure 1-3, Current District

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

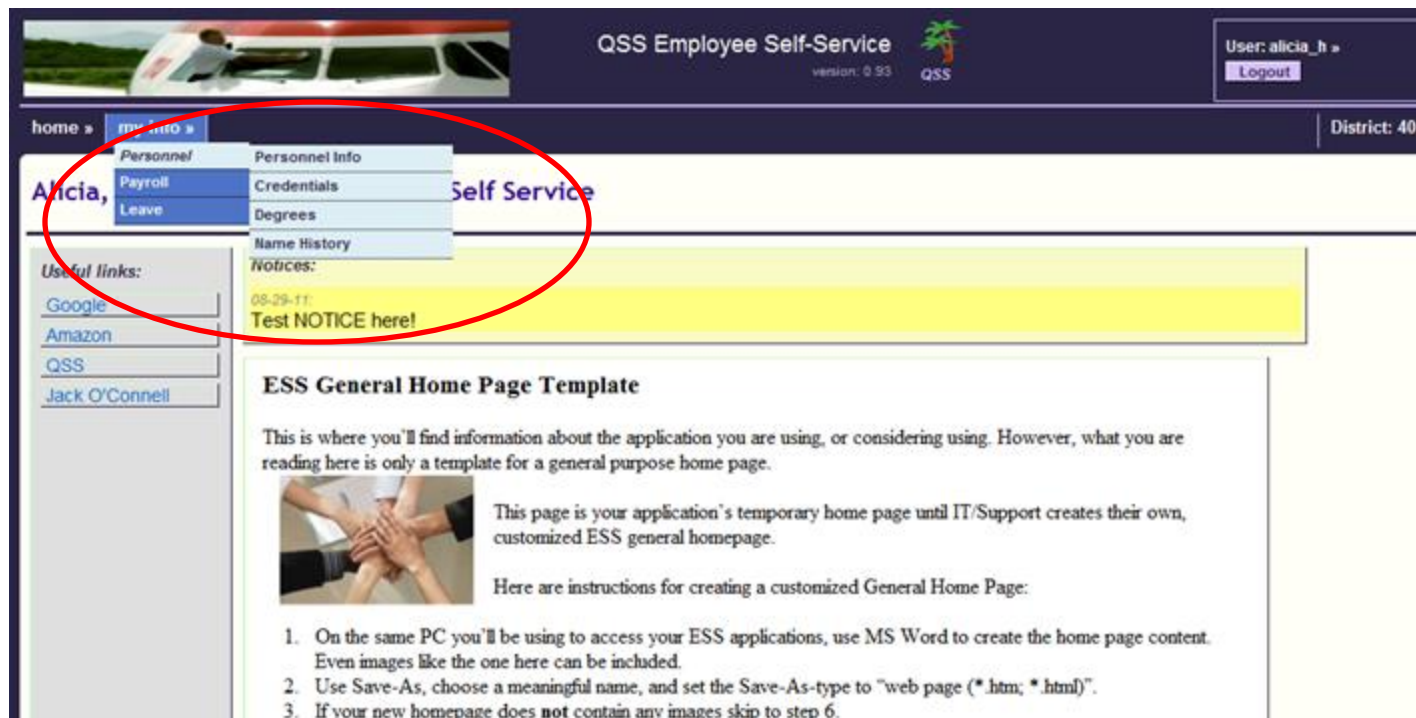
- Linux server – RedHat, SUSE
 - Often provisioned to become the version-L server, can be separate if desired
- MS SQLServer or PostgreSQL database
- Minisoft ODBC driver for Version H
- QSS access to Linux and db servers
- Client browsers – IE 8+, FireFox, Chrome



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



QSS Employee Self-Service
version: 0.93 QSS

User: alicia_h »
Logout


home » Personnel »
Alicia, Personnel Info
Payroll Credentials
Leave Degrees
Name History
Notices:
08-29-11:
Test NOTICE here!

Useful links:
Google
Amazon
QSS
Jack O'Connell

District: 40

ESS General Home Page Template

This is where you'll find information about the application you are using, or considering using. However, what you are reading here is only a template for a general purpose home page.



This page is your application's temporary home page until IT/Support creates their own, customized ESS general homepage.

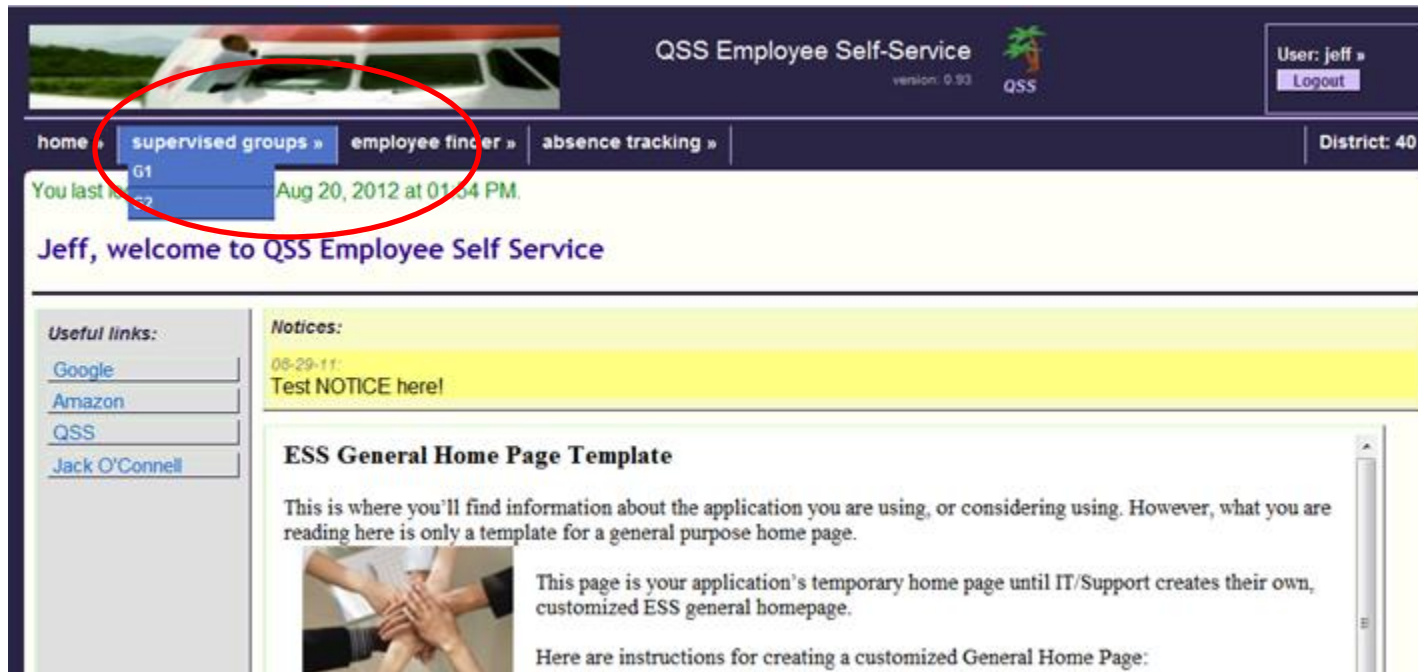
Here are instructions for creating a customized General Home Page:

1. On the same PC you'll be using to access your ESS applications, use MS Word to create the home page content. Even images like the one here can be included.
2. Use Save-As, choose a meaningful name, and set the Save-As-type to "web page (*.htm; *.html)".
3. If your new homepage does **not** contain any images skip to step 6.

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



The screenshot displays the QSS Employee Self-Service web application interface. At the top, there is a header with a logo on the left, the text "QSS Employee Self-Service" and "version: 0.93" in the center, and a user profile on the right showing "User: jeff" and a "Logout" button. Below the header is a navigation menu with items: "home", "supervised groups", "employee finder", and "absence tracking". The "supervised groups" item is circled in red. To the right of the navigation menu, it says "District: 40". Below the navigation menu, there is a message: "You last logged in on Aug 20, 2012 at 01:54 PM." Below this is a welcome message: "Jeff, welcome to QSS Employee Self Service". The main content area is divided into two columns. The left column has a section titled "Useful links:" with links for "Google", "Amazon", "QSS", and "Jack O'Connell". The right column has a section titled "Notices:" with a notice dated "08-29-11" that says "Test NOTICE here!". Below the notices is a section titled "ESS General Home Page Template" with a paragraph of text: "This is where you'll find information about the application you are using, or considering using. However, what you are reading here is only a template for a general purpose home page." Below this text is a small image of hands stacked together. To the right of the image is another paragraph: "This page is your application's temporary home page until IT/Support creates their own, customized ESS general homepage." Below this is a final paragraph: "Here are instructions for creating a customized General Home Page:".

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

QSS Employee Self-Service
version: 0.93 QSS

User: admin
Logout

home » employee finder » absence tracking » admin » District: 40

New search
Previous search


admin, QSS Employee Self Service

Useful links:
[Google](#)
[Amazon](#)
[QSS](#)
[Jack O'Connell](#)

Notes:
08-29-11
Test NOTICE here!

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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

home » employee finder » absence tracking »

New Group [[List groups](#) | [back](#)]

* indicates required fields

Group name: **Group abbr:**

Description:

Add supervisors:
(start typing last name)

	Name	Emp #	Type	Login
<input type="checkbox"/>	Bush, Lyndon	105420	Staff	oasisuser

Add screens: (drag screen name to re-order)

Personnel Pay Leave W2
 Credential Degrees NameHist

Add members:

Last name: **First name:** **Emp #:**

– and –

Gender: **Terminated:**

– and –

Site:

– and –

Leave group: – or –

Report code: – or –

Bargaining unit:



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

Aly Bush (emp# ████████) [search]

Leave Group: "Teacher (6A)"

Personnel Info | Pay History | Leave | W-2s | Credentials | Degrees | Name History

[calendar view](#) | [table view](#)

August 2012							today	<<	▶	>>
Sun	Mon	Tue	Wed	Thu	Fri	Sat				
29 * Sick Leave (0.5)	30	31	1	2	3	4				
5	6	7	8	9	10	11				
12	13	14	15	16	17	18				
19	20	21	22	23	24	25				
26	27	28	29	30	31	1				
2	3	4	5	6	7	8				

Leave Category	Balance (days)		Usage	Notes
	Actual	Avail	(days)	
Sick Leave	70.50	70.50	0.00	
Personal Necessity	0.00	0.00	0.00	Personal Necessity leave taken is also subtracted from Sick Leave.
Compelling Personal Importance	4.00	0.00	0.00	Capped by "Personal Necessity".

Absence Tracking – Leave Request

26	27
2	3

Status: Submit

Position: Teacher K-6 (Westward)

TK: Please select

Reason: Please select

Start: Please select

End: Personal Necessity (PN)

of days: School Business (SB)

Remark:

Submit Reset Cancel

Absence Tracking – Adding a Time-keeper

Add Time-keeper for District: Qss Demo (40) District (40) [[List TKs](#) | [back](#)]

Name: (to select a TK enter the 1st few letters of user's last name and click the matching row)

	Name	Emp #	Type	Login
<input type="checkbox"/>	Friday, Joe	110342	Staff	freaky

Sites:

- | | | | | |
|--|--|--|--|--|
| <input type="checkbox"/> Acclaim Charter -... | <input type="checkbox"/> Acclaim Charter -... | <input type="checkbox"/> Acclaim Charter -... | <input type="checkbox"/> Accounting | <input type="checkbox"/> Accounts Payable |
| <input type="checkbox"/> Adams, John Quinc... | <input type="checkbox"/> Assessment, Resaa... | <input type="checkbox"/> Assoc Superintend... | <input type="checkbox"/> Baumgartner, Elbi... | <input type="checkbox"/> Backer Elementar... |
| <input type="checkbox"/> Board Of Education | <input type="checkbox"/> Budget | <input type="checkbox"/> Business Svcs | <input type="checkbox"/> Cherry Pie High | <input type="checkbox"/> Child Welfare & A... |
| <input type="checkbox"/> Clairvoyant Eleme... | <input type="checkbox"/> Classic Elementary | <input type="checkbox"/> Clinton Elementary | <input type="checkbox"/> Community Relatio... | <input type="checkbox"/> Curriculum - Clas... |
| <input type="checkbox"/> Qualifications - E... | <input type="checkbox"/> Qualifications - E... | <input type="checkbox"/> Qualifications - G... | <input type="checkbox"/> Qualifications - I... | <input type="checkbox"/> Qualifications - I... |

Absence Tracking – Configuring Absence Reasons

Absence Reasons:

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



ESS Live Discussion

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