1/17/2018

Manager Self Service (MSS) User Guide

Kent County

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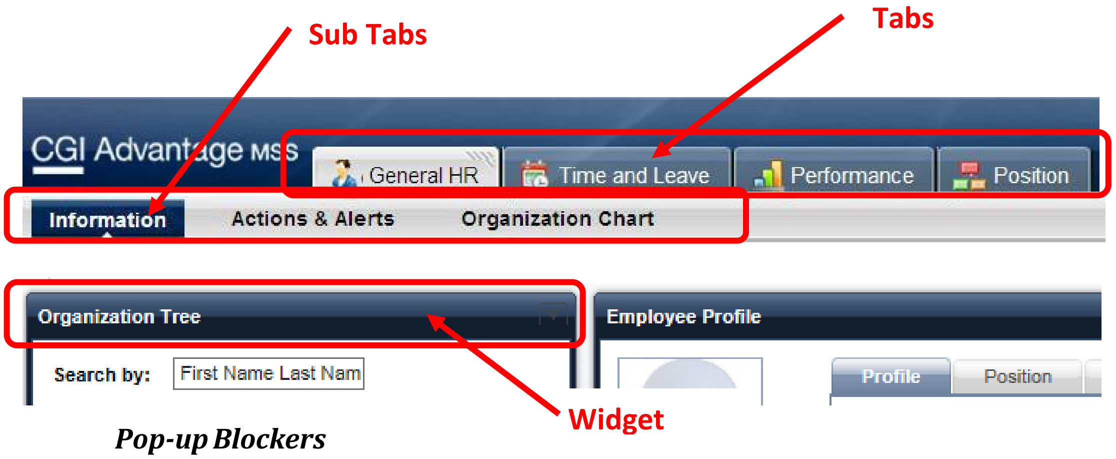
1. Manager Self Service (MSS)

A360 Manager Self Service (MSS) enables managers to easily access and take action on relevant data that is pertinent to their daily activities. This guide describes each of the features available within MSS.

A. Tabs/Sub Tabs/Widgets/Dashboards

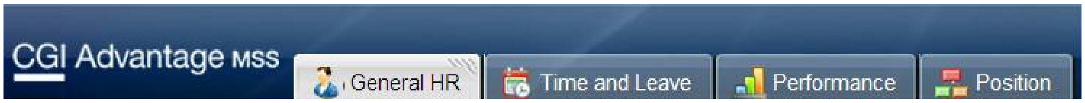
MSS is comprised of tabs, sub tabs, and widgets with data about your direct reports pertaining to General HR, Time and Leave, and Performance.


Sub Tabs
Tabs
CGI Advantage MSS
General HR
Time and Leave
Performance
Position
Information
Actions & Alerts
Organization Chart
Organization Tree
Search by:
First Name Last Nam
Employee Profile
Profile
Position
Widget

Pop-up Blockers

There are Browsers and Browser helper programs/toolbars that have a function to block Pop-Up ads. However, some pop-up blocking programs cannot distinguish between a pop-up ad and a useful new window. Please be aware that the MSS application uses “new browser windows” to display the online documentation. If you are using a pop-up ad blocker program and these windows do not display, then the pop-up blocker program will need to be disabled while using the MSS application.

2. General HR


CGI Advantage MSS
General HR
Time and Leave
Performance
Position

The General HR is organized into three sub-tabs covering the areas of Information, Actions & Alerts and Organization Chart.

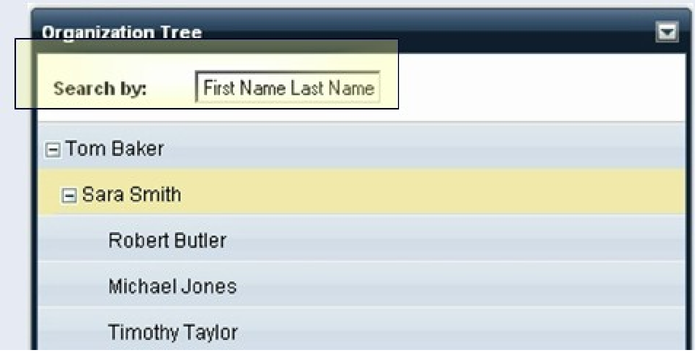
A. Information Sub Tab

The following widgets can be found on the Information sub tab:

- Organization Tree
- Employee Profile
- Employee Change Wizard – Not available at Go Live
- Employee Change Status – Not available at Go Live

I. Organization Tree

The Organization Tree widget displays the list of individuals that occupy positions that report to you. **This widget is used to select individuals for which data will be displayed in other widgets throughout MSS**. For example, when you select an employee in the Organization Tree, the Employee Profile widget will display details on the selected individual.

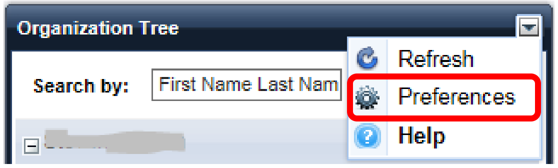

Organization Tree
Search by:
First Name Last Name
Tom Baker
Sara Smith
Robert Butler
Michael Jones
Timothy Taylor

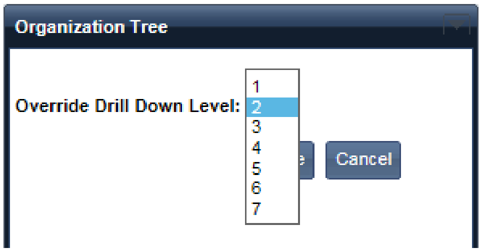
The reporting structure is based on the position, not the individual.

If the list of employees is incorrect, please contact Human Resources at 632-7440.

a. Organization Tree Preferences

Override Drill Down Level - The Organization Tree widget can be configured to show multiple levels of your direct reports. From the General HR Organization Tree widget, edit the widget's preferences. Select how many levels of your direct reports you wish to view on the Organization Chart. For example, if you choose “1” as your drill down level, you will see only the employees that report directly to you. If you choose a number greater than 1, you will see multiple levels (for example, the direct reports of the individuals who report to you). Save your selection and the Organization Tree will refresh based on your selection.

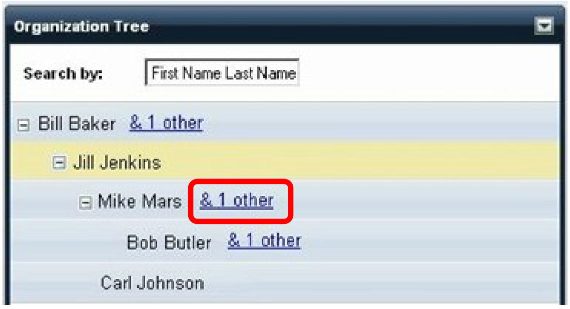

Organization Tree
Search by:
First Name Last Nam
[redacted]
Refresh
Preferences
Help


Organization Tree
Cancel

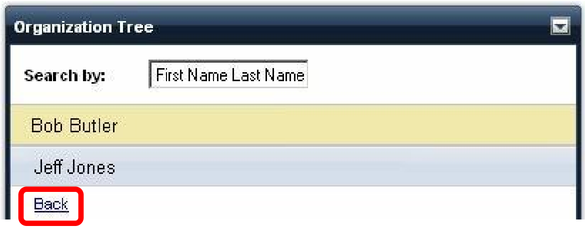
Override Drill Down Level: 1 2 3 4 5 6 7

b. Multiple Employees Filling a Position

If there are multiple employees for a position, the number of additional employees is displayed as a link next to the selected employee's name in the Organization Tree (for example, one additional employee will display as "& 1 other").


Organization Tree
Search by:
First Name Last Name
Bill Baker & 1 other
Jill Jenkins
Mike Mars & 1 other
Bob Butler & 1 other
Carl Johnson

When you select this link, the Organization Tree zooms in and you see all the individuals that occupy that position. For example, in the Organization Tree shown above, if you select the "& 1 other" link next to Bob Butler, the two employees that fill that position, Bob Butler and Jeff Jones are displayed in the zoomed in view, as shown in the image below.


Organization Tree
Back

Search by: First Name Last Name

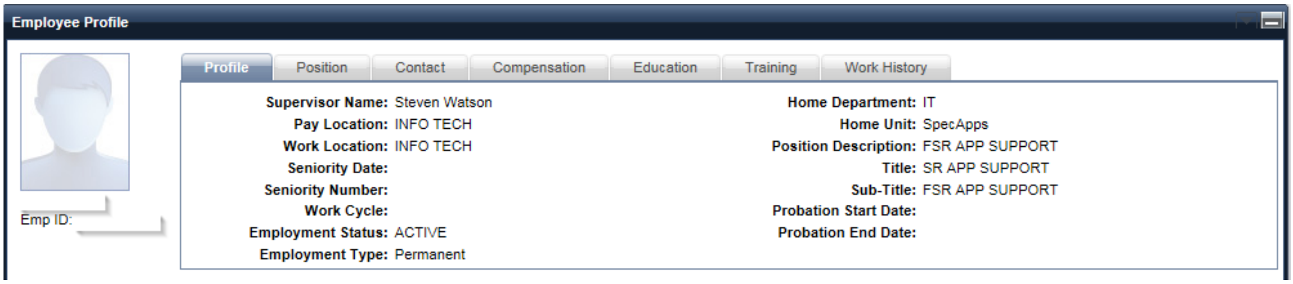
Bob Butler

Jeff Jones

You may then choose an individual from the zoomed in Organization Tree and this person will be displayed in any widgets that use the Organization Tree for selection. Once you have finished looking at this part of the hierarchy, you can select **Back** and return to the Organization Tree.

II. Employee Profile

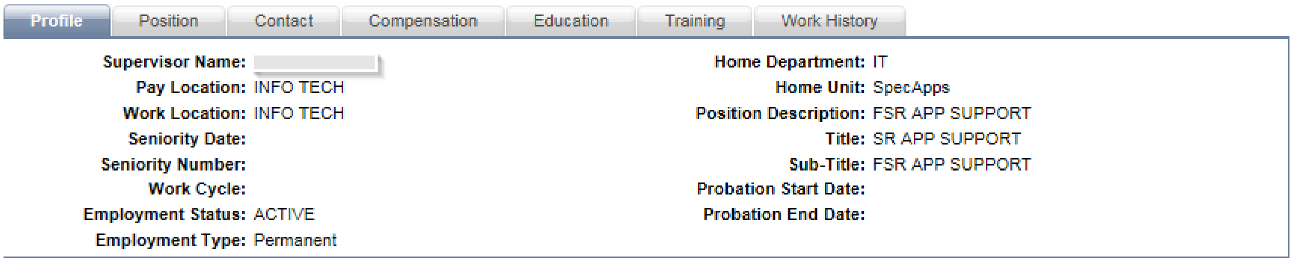
When you select an employee in the Organization Tree widget, you are able to view the employee-related information for that employee in the Employee Profile widget.


Employee Profile
Profile
Position
Contact
Compensation
Education
Training
Work History
Emp ID:

Supervisor Name: Steven Watson
Pay Location: INFO TECH
Work Location: INFO TECH
Seniority Date:
Seniority Number:
Work Cycle:
Employment Status: ACTIVE
Employment Type: Permanent
Home Department: IT
Home Unit: SpecApps
Position Description: FSR APP SUPPORT
Title: SR APP SUPPORT
Sub-Title: FSR APP SUPPORT
Probation Start Date:
Probation End Date:

a. Profile Tab

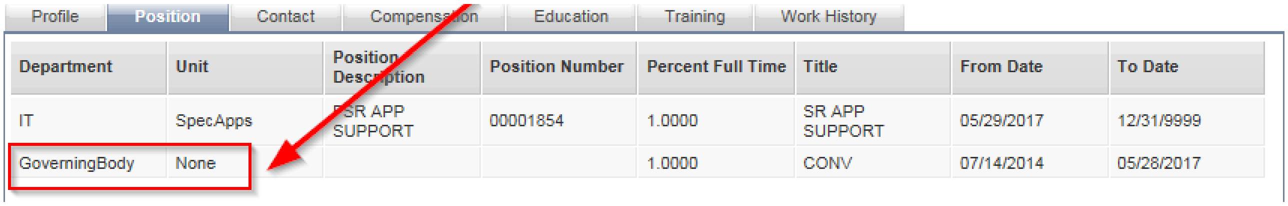
The **Profile** tab displays the selected employee's profile information.


Profile
Position
Contact
Compensation
Education
Training
Work History

Supervisor Name:
Pay Location: INFO TECH
Work Location: INFO TECH
Seniority Date:
Seniority Number:
Work Cycle:
Employment Status: ACTIVE
Employment Type: Permanent
Home Department: IT
Home Unit: SpecApps
Position Description: FSR APP SUPPORT
Title: SR APP SUPPORT
Sub-Title: FSR APP SUPPORT
Probation Start Date:
Probation End Date:

b. Position Tab

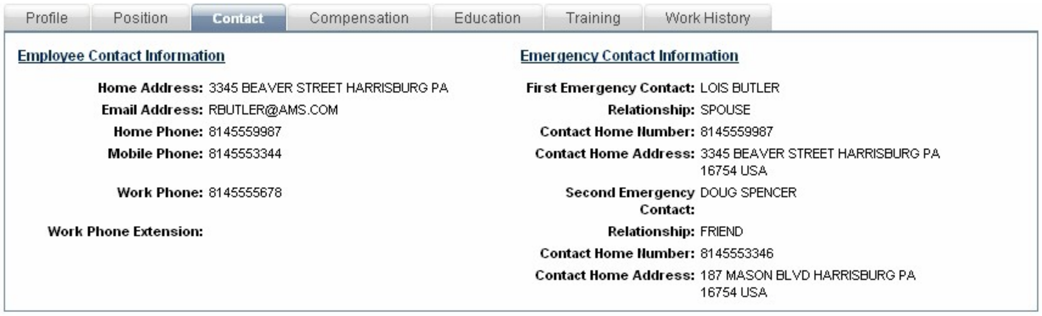
The **Position** tab displays the current and prior position details for the selected employee. Positions held prior to Go Live will not be displayed. GoverningBody entries are part of the conversion records at go live.


Profile
Position
Contact
Compensation
Education
Training
Work History

Department	Unit	Position Description	Position Number	Percent Full Time	Title	From Date	To Date
IT	SpecApps	FSR APP SUPPORT	00001854	1.0000	SR APP SUPPORT	05/29/2017	12/31/9999
GoverningBody	None			1.0000	CONV	07/14/2014	05/28/2017

c. Contact Tab

The **Contact** tab allows you to view the contact details for the selected employee.



Employee Contact Information

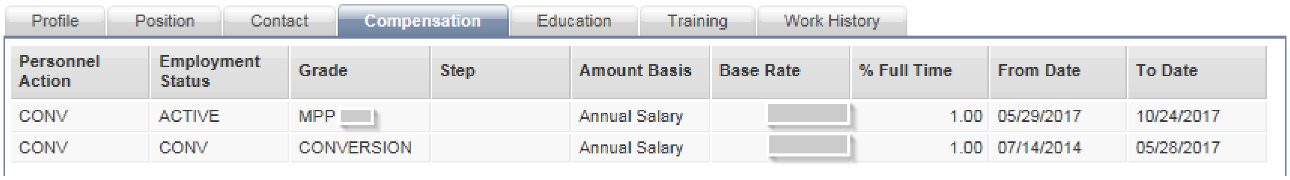
Home Address: 3345 BEAVER STREET HARRISBURG PA
Email Address: RBUTLER@AMS.COM
Home Phone: 8145559987
Mobile Phone: 8145553344
Work Phone: 8145555678
Work Phone Extension:

Emergency Contact Information

First Emergency Contact: LOIS BUTLER
Relationship: SPOUSE
Contact Home Number: 8145559987
Contact Home Address: 3345 BEAVER STREET HARRISBURG PA 16754 USA
Second Emergency Contact: DOUG SPENCER
Relationship: FRIEND
Contact Home Number: 8145553346
Contact Home Address: 187 MASON BLVD HARRISBURG PA 16754 USA

d. Compensation Tab

The **Compensation** tab allows you to view a selected employee's prior pay details. Only current position is brought over at Go Live. CONV is part of the conversion record at go live.



Personnel Action	Employment Status	Grade	Step	Amount Basis	Base Rate	% Full Time	From Date	To Date
CONV	ACTIVE	MPP [redacted]		Annual Salary	[redacted]	1.00	05/29/2017	10/24/2017
CONV	CONV	CONVERSION		Annual Salary	[redacted]	1.00	07/14/2014	05/28/2017

e. Education Tab – Not available at Go Live

f. Training Tab – Not available at Go Live

g. Work History Tab – Not available at Go Live

III. Employee Change Wizard – Not available at Go Live

IV. Employee Change Status – Not available at Go Live

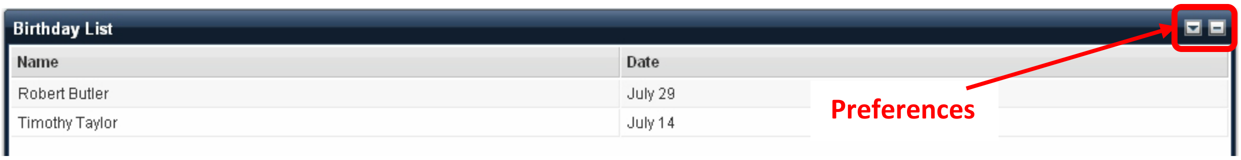
B. Actions & Alerts Sub Tab

The following widgets can be found on the Actions & Alerts sub tab:

- Birthday List
- Anniversary List
- Employee Change Worklist – Not available at Go Live
- Out of Office

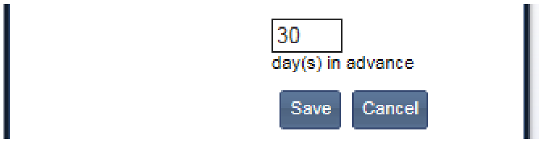
I. Birthday List

The Birthday List widget displays a list of your direct reporting employees' birthdays. You can set the number of days in advance of the employee's birthday you would like the employee to appear in the Birthday List through the widget preferences.



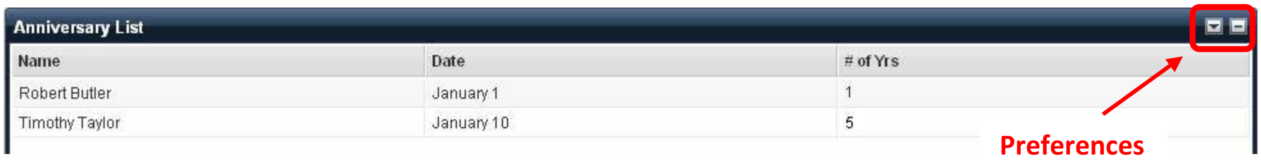
Name	Date
Robert Butler	July 29
Timothy Taylor	July 14

Set the **Display Birthday List** preference to the number of days in advance of an employee's birthday you would like the employee to appear in the Birthday List. For example, if you would like to know a month in advance when an employee will be celebrating their birthday, you would set this preference to 31 days. Values for this parameter must be between 0 and 365.


30
day(s) in advance

II. Anniversary List

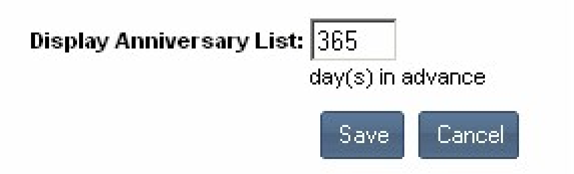
The Anniversary List widget displays the anniversaries of your direct reporting employees' hire date. The Anniversary List displays the employee's name, date of the anniversary, and number of years of service to the organization in order by date.



Name	Date	# of Yrs
Robert Butler	January 1	1
Timothy Taylor	January 10	5

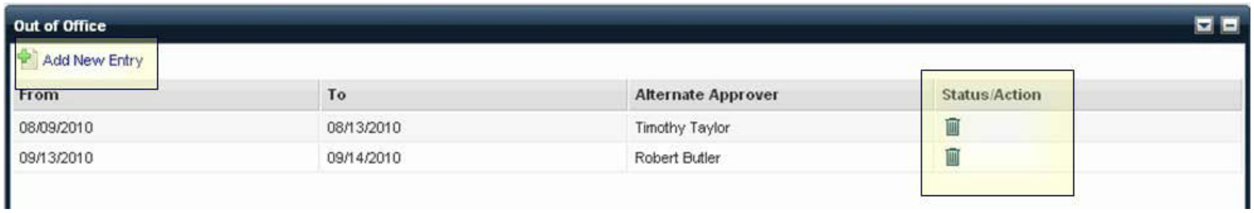
a. Anniversary List Preferences

Set the **Display Anniversary List** preference to the number of days in advance of the employee's anniversary you would like the employee to appear in the Anniversary List.


Display Anniversary List: 365
day(s) in advance

III. Out of Office

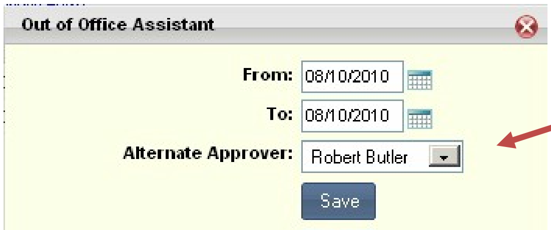
The Out of Office widget allows you to designate a period of time when you will be out of the office and to appoint an alternate approver that will be responsible for taking action on items requiring your approval while you are away.



From	To	Alternate Approver	Status/Action
08/09/2010	08/13/2010	Timothy Taylor	🗑
09/13/2010	09/14/2010	Robert Butler	🗑

a. Add New Entry

To add a new out of office entry, select **Add New Entry**. Enter the **From** and **To** dates that you will be out of the office, and select an **Alternate Approver,** then select **Save**. If you return to the office after the planned **To** date, the out of office entry will automatically disappear from the Out of Office widget and your work items will be routed to you once again.


Out of Office Assistant
Save

From: 08/10/2010
To: 08/10/2010
Alternate Approver: Robert Butler

The Alternate Approver list is system-generated based on reporting hierarchy.

b. Return to Office or Delete Out of Office Entry

If you wish to end the routing of your workflow items to the alternate approver, select the **Trash** 🗑 icon, under the **Status/Action** column, for the out of office entry.

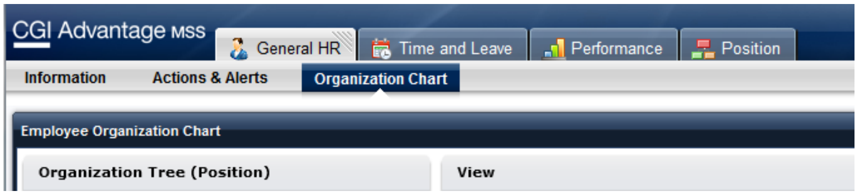
Note: *If work items have already been routed to the alternate approver prior to your return to office, they will not be re-routed back to you. For example, if you return to the office the day that timesheets are due, but some employees submitted their timesheets a day early, those timesheets would have already been routed to your alternate approver and will not be returned to you.*

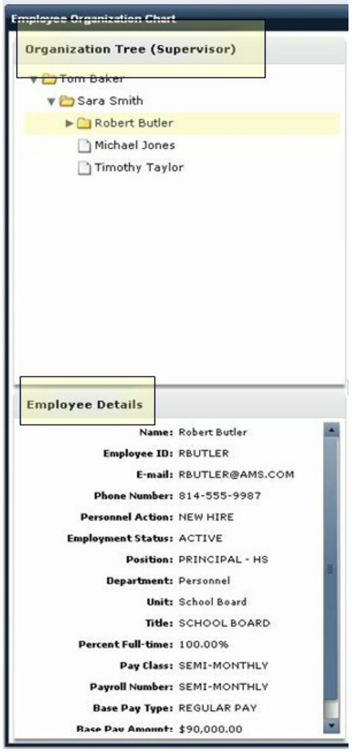
IV. Employee Change Worklist – Not available at Go Live

C. Organization Chart Sub Tab

I. Employee Organization Chart

This widget allows you to view your organization hierarchy.


CGI Advantage MSS
General HR
Time and Leave
Performance
Position
Information
Actions & Alerts
Organization Chart
Employee Organization Chart
Organization Tree (Position)
View


Employee Organization Chart
Organization Tree (Supervisor)
Tom Baker
Sara Smith
Robert Butler
Michael Jones
Timothy Taylor
Employee Details

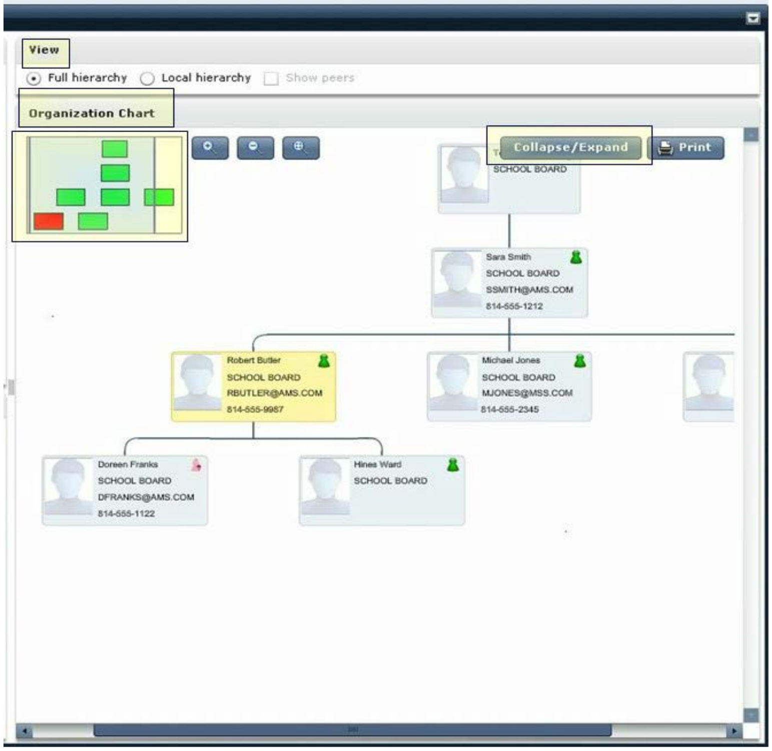
Name: Robert Butler
Employee ID: RBUTLER
E-mail: RBUTLER@AMS.COM
Phone Number: 814-555-9987
Personnel Action: NEW HIRE
Employment Status: ACTIVE
Position: PRINCIPAL - HS
Department: Personnel
Unit: School Board
Title: SCHOOL BOARD
Percent Full-time: 100.00%
Pay Class: SEMI-MONTHLY
Payroll Number: SEMI-MONTHLY
Base Pay Type: REGULAR PAY
Base Pay Amount: $90,000.00

a. Organization Tree Section

The Organization Tree section functions in a similar manner as the Organization Tree widgets that you see throughout the MSS application. You can navigate through your hierarchy and select employees to see the selection reflected in the Organization Chart. Additionally, when you select an individual in the Hierarchy, the Employee Details section will be populated with information for this specific employee.

b. Employee Details Section

This section is populated when you select an employee node in the chart or select an employee name from the hierarchy section of the widget. The Employee Details section displays the employee assignment and salary details for the selected employee.


View
● Full hierarchy
○ Local hierarchy
☐ Show peers
Organization Chart
Collapse/Expand
Print
SCHOOL BOARD
Sara Smith
SCHOOL BOARD
SSMITH@AMS.COM
814-555-1212
Robert Butler
SCHOOL BOARD
RBUTLER@AMS.COM
814-555-9987
Michael Jones
SCHOOL BOARD
MJONES@MSS.COM
814-555-2345
Doreen Franks
SCHOOL BOARD
DFRANKS@AMS.COM
814-555-1122
Hines Ward
SCHOOL BOARD

c. Organization Chart Section

This section displays a graphical view of your organization hierarchy for the logged in user. You can control the number of levels to display and the appointment ID/job for which you want to view the chart, by setting these parameters on the Organization Tree widget on the General HR tab.

d. Organization Chart Navigation

The following navigation features can be used on the Organization Chart:

Full Hierarchy - Displays the entire hierarchy with a zoom in/zoom out feature.

Local Hierarchy - For the selected employee, displays the manager above and his/her direct reports below. A single click on an employee shows it on the full view and a double click centers the local Organization Chart on this particular employee

Show Peers - *S*hows the employees that have the same superior.

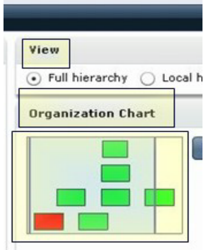
Zoom in/Zoom out - The zoom-in function can be triggered either by moving the chart around or by selecting a sub-set of employees.

Collapse/Expand - Allows you to increase or decrease the size of the organization chart to improve readability.

e. Organization Chart Navigator

If an employee is in an active employment status, then the nodes in the organization chart navigator are displayed in green.

If an employee is in an inactive employment status, then the nodes in the organization chart navigator are displayed in red.


View
● Full hierarchy
○ Local h
Organization Chart

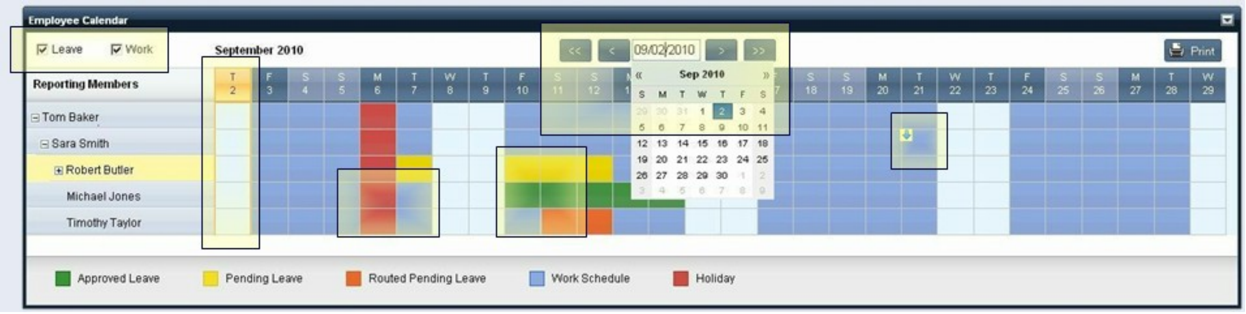
3. Time and Leave

The Time and Leave Management tab allows you to view and approve the time and leave requests and leave balances for your direct reports.

A. Calendar Sub Tab

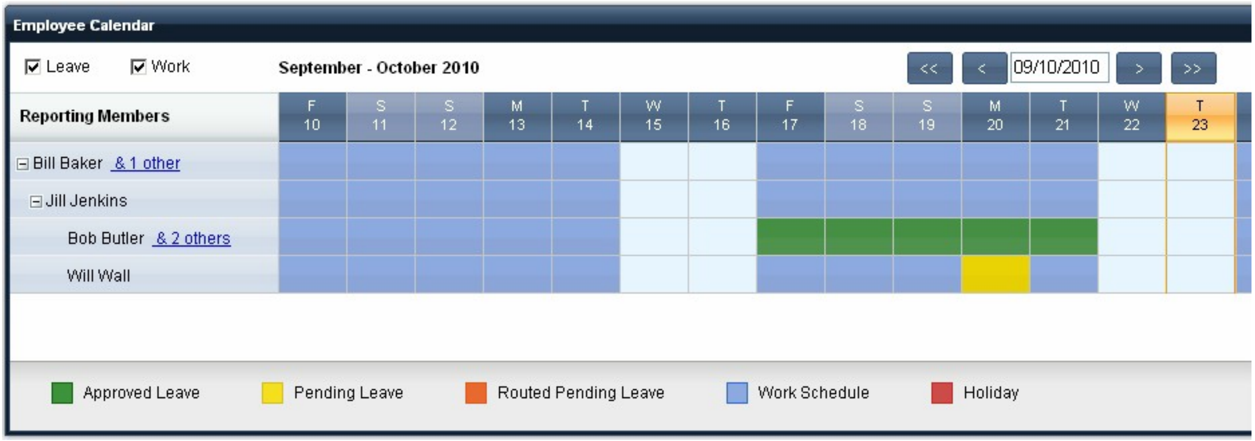
I. Employee Calendar

The Employee Calendar widget enables you to view time and leave data from your reporting hierarchy for your direct reporting employees. The calendar opens with a four week calendar format, beginning with the current date. The current date is highlighted with an orange border.

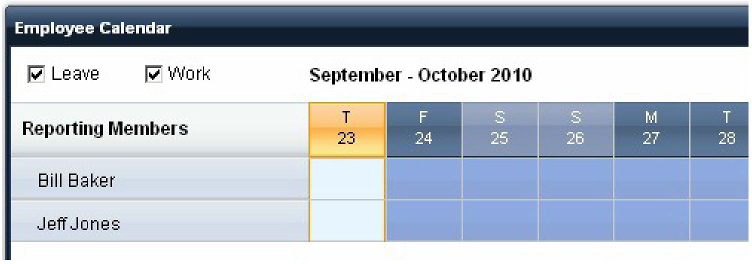

Employee Calendar
☑ Leave
☑ Work
September 2010
09/02/2010
Print
Reporting Members
Tom Baker
Sara Smith
Robert Butler
Michael Jones
Timothy Taylor
Sep 2010
Approved Leave
Pending Leave
Routed Pending Leave
Work Schedule
Holiday

a. Multiple Employees Filling a Position

If there are multiple employees for a position, the number of additional employees is displayed as a link next to the selected employee's name in the Organization Tree (for example, one additional employee will display as "& 1 other").


Employee Calendar
☑ Leave
☑ Work
September - October 2010
<<
<
09/10/2010
>
>>
Reporting Members
F 10
S 11
S 12
M 13
T 14
W 15
T 16
F 17
S 18
S 19
M 20
T 21
W 22
T 23
Bill Baker & 1 other
Jill Jenkins
Bob Butler & 2 others
Will Wall
Approved Leave
Pending Leave
Routed Pending Leave
Work Schedule
Holiday

When you select this link, the Organization Tree zooms in and you can see all the individuals that occupy that position. For example, in the Employee Calendar shown above, if you select the "& 1 other" link next to Bill Baker, the two employees that fill that position, Bill Baker and Jeff Jones, are displayed in the zoomed in view, as shown in the image below.



Employee Calendar

☑ Leave ☑ Work

September - October 2010

Reporting Members	T 23	F 24	S 25	S 26	M 27	T 28
Bill Baker						
Jeff Jones						

Select **Back** to return to the full view of the Employee Calendar.

b. Calendar Navigation

You can navigate either forward or backward through the calendar, either one day or four weeks at a time, by clicking on these navigation buttons (<<, < or >, >>). Click on the date to display a calendar where you can select a date.

c. Holidays/Work Days/Off Days

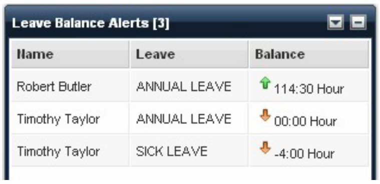
Holidays are highlighted in red, scheduled work days are highlighted in blue, and off days are white.

II. Employee Scheduling Wizard – Not available at Go Live

B. Actions & Alerts Sub Tab

I. Leave Balance Alerts

The Leave Balance Alerts widget provides notification when your direct reporting employees are approaching either their maximum or minimum leave thresholds. The maximum/minimum indicator displays an up arrow to represents that an employee is approaching the maximum for that leave type, a down arrow to represent that an employee is close to exhausting that leave type.



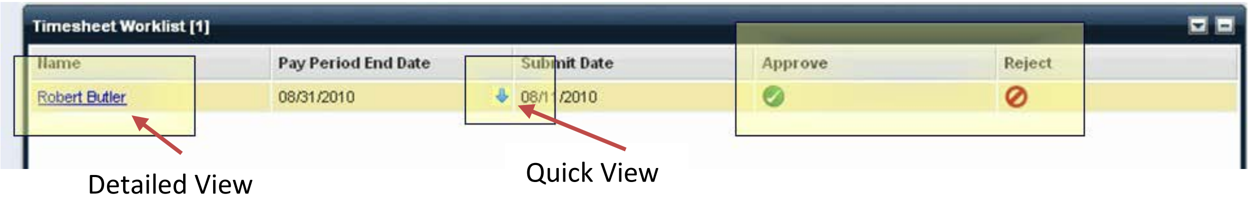
Leave Balance Alerts [3]

Name	Leave	Balance
Robert Butler	ANNUAL LEAVE	↑ 114:30 Hour
Timothy Taylor	ANNUAL LEAVE	↓ 00:00 Hour
Timothy Taylor	SICK LEAVE	↓ -4:00 Hour

II. Timesheet Worklist

The Timesheet Worklist widget displays pending timesheets which require action from you. Once a timesheet has been approved or rejected, it is removed from the worklist.

The display of employee timesheets depends on your assigned supervisory role. Note: If someone has assigned you as their "alternate approver" while they are out of the office, you will see timesheets from employees other than your direct reports.



Timesheet Worklist [1]

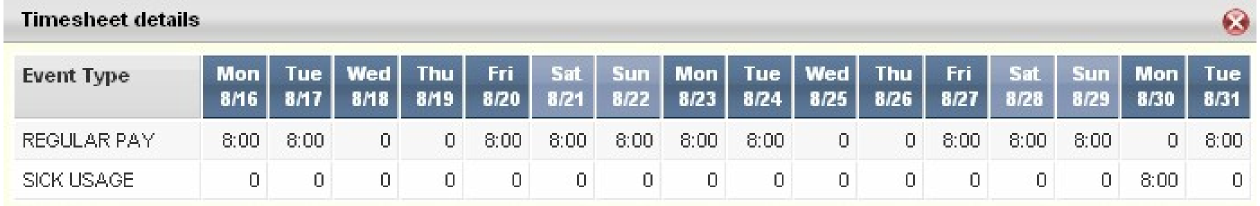
Name	Pay Period End Date	Submit Date	Approve	Reject
Robert Butler	08/31/2010	↓ 08/1 /2010	✓	⊘

a. View Timesheet Details in Read-Only Mode (Detailed View)

The employee name on the worklist is displayed as a hyperlink; click this link to view the timesheet in read-only mode. (Mangers cannot edit an employee's timesheet, only approve for submission or reject for employee correction). This view opens up a new window with timesheet details and employee comments.

b. Quick View

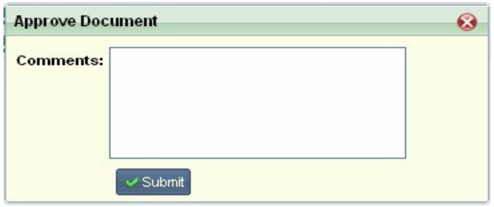
Mouse over the Pay Period End Date and select the down arrow to open a quick view, which displays the timesheet details. Select ⊗ to close this view.

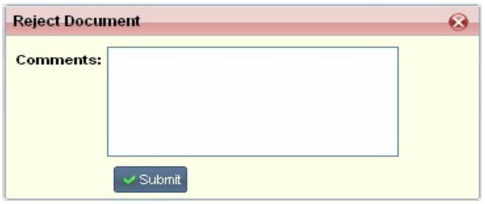


Event Type	Mon 8/16	Tue 8/17	Wed 8/18	Thu 8/19	Fri 8/20	Sat 8/21	Sun 8/22	Mon 8/23	Tue 8/24	Wed 8/25	Thu 8/26	Fri 8/27	Sat 8/28	Sun 8/29	Mon 8/30	Tue 8/31
REGULAR PAY	8:00	8:00	0	0	8:00	8:00	8:00	8:00	8:00	0	0	8:00	8:00	8:00	0	8:00
SICK USAGE	0	0	0	0	0	0	0	0	0	0	0	0	0	0	8:00	0

c. Approve/Reject Worklist Item

To approve or reject a worklist item, select either the **Approve** or **Reject** button, and an approve/reject comment box will pop up, depending on your selection. Comments are mandatory if the work item is being rejected. Select the **Submit** button to approve the item, or select ⊗ to cancel approve/reject action for that particular request. After a request is approved or rejected, the corresponding work item is removed from the worklist.

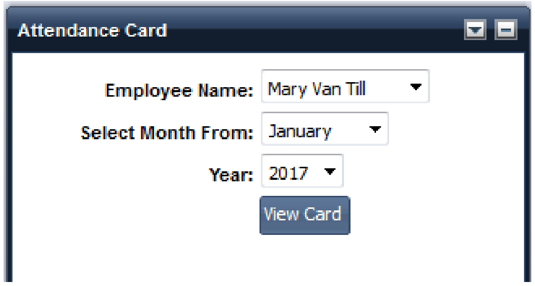




III. Attendance Card

The Attendance Card widget allows you to view an employee's leave usage over the course of a year.

When you open the Attendance Card widget, you are presented with Employee, Month, and Year selection drop down menus. Once you make your selection, select the **View Attendance Card** button and you will see an employee's leave details for a twelve-month period from the selected from date.



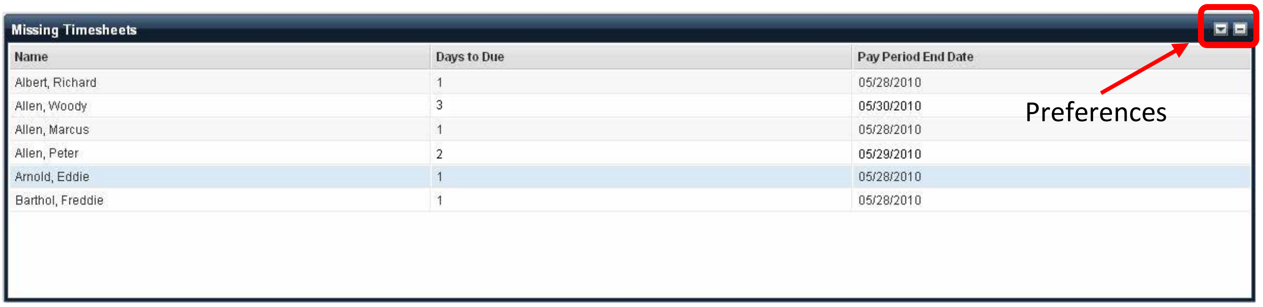
Employee Name: Mary Van Till
Select Month From: January
Year: 2017

IV. Leave Request Worklist – Not in use at Go Live

The Leave Request Worklist widget displays pending leave requests which are in review. Once a leave request has been approved or rejected, it is removed from the worklist.

V. Missing Timesheets

The Missing Timesheets widget provides you with notification alerts when a direct reporting employee fails to submit their timesheet by the pay period due date. A positive number displayed in **Days to Due** represents the number of days left before the timesheet is due. A negative number represents the number of days that a timesheet is past due.



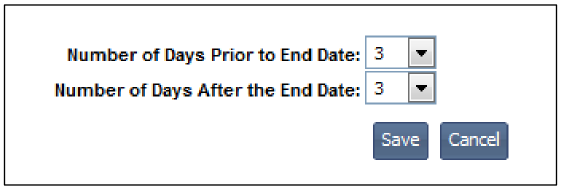
Missing Timesheets

Name	Days to Due	Pay Period End Date
Albert, Richard	1	05/28/2010
Allen, Woody	3	05/30/2010
Allen, Marcus	1	05/28/2010
Allen, Peter	2	05/29/2010
Arnold, Eddie	1	05/28/2010
Barthol, Freddie	1	05/28/2010

Preferences

d. Missing Timesheets Preferences

The following are the preferences that can be defined for the Missing Timesheets widget:



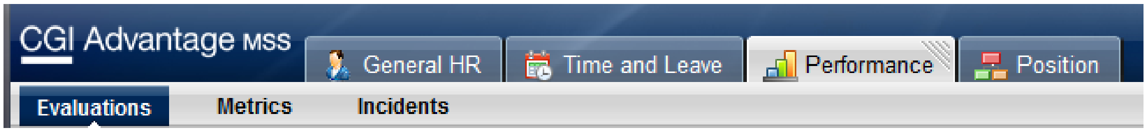
Number of Days Prior to End Date: 3

Number of Days After the End Date: 3

- **Number of Days Prior to End Date** - use this to define the number of days prior to the employee's timesheet due date that you wish to be notified of the missing timesheet. For example, If you specify that **Number of Days Prior to End Date** = 2 and the employee has not submitted their timesheet two days prior to the due date, then you will get an alert.
- **Number of Days After the End Date** - use this to define the number of days after the timesheet due date you wish to display alerts. For example, if the timesheet is due May 1st and the **Number of Days After the End Date** is set to 5, you will see the timesheet alerts for missing timesheets until May 5th. On May 6th, the alert will no longer appear.

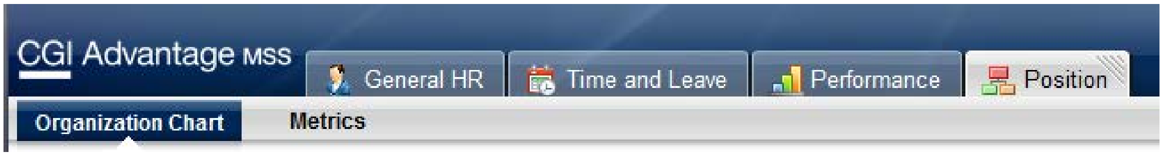
*Note: If the **Number of Days Prior to End Date** and **Number of Days After the End Date** parameters are set to 0, you will only be notified on the timesheet due date if any timesheets have not been submitted.*

4. Performance – Not available at Go Live


CGI Advantage MSS
General HR
Time and Leave
Performance
Position
Evaluations
Metrics
Incidents

The Performance Management tab and sub tabs allow you to update, view and approve performance expectations and evaluations for your direct reports.

5. Position

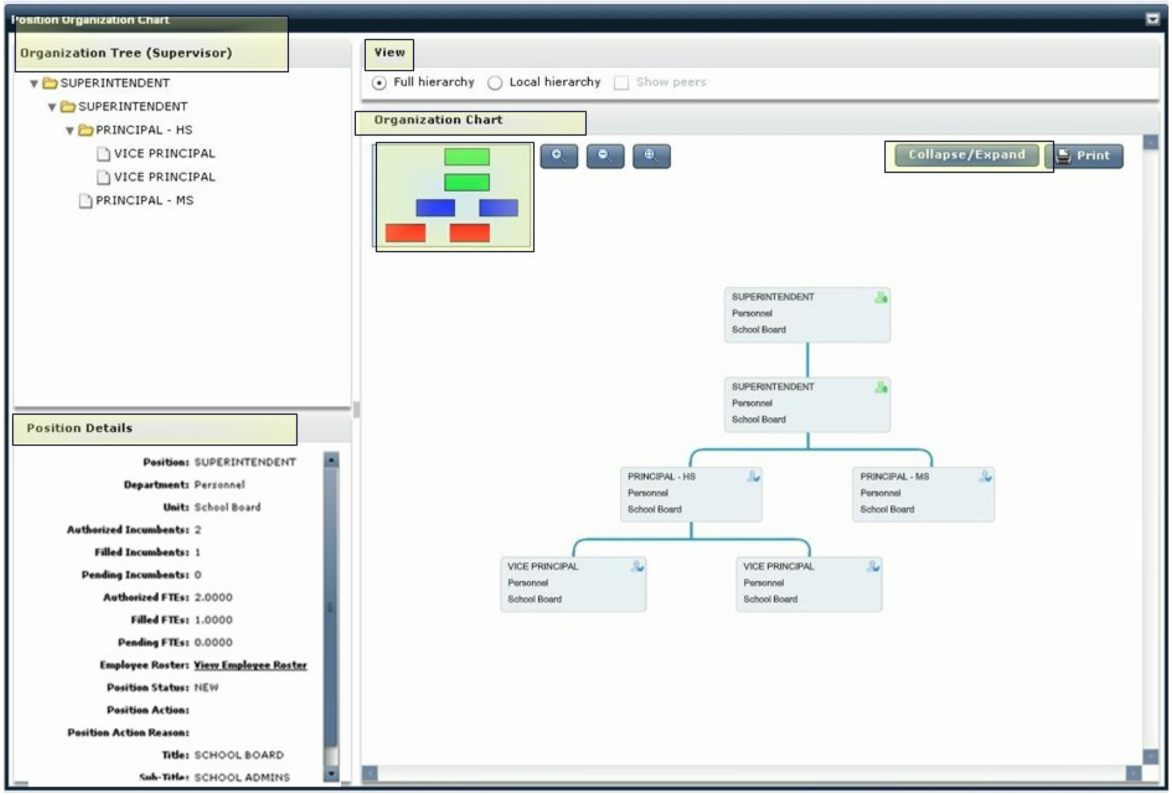

CGI Advantage MSS
General HR
Time and Leave
Performance
Position
Organization Chart
Metrics

The Position Management component of Advantage MSS provides the managers with the visual representation of the employee human resource information and the organization's position hierarchy information.

A. Organization Chart Sub Tab

I. Position Organization Chart

This widget allows you to view the reporting relationships of the positions in the organization.

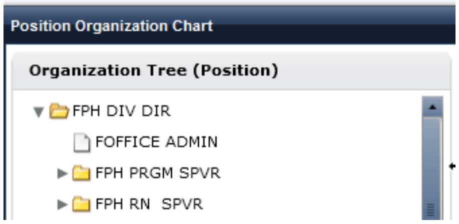

Position Organization Chart
Organization Tree (Supervisor)
SUPERINTENDENT
SUPERINTENDENT
PRINCIPAL - HS
VICE PRINCIPAL
VICE PRINCIPAL
PRINCIPAL - MS
View
Full hierarchy
Local hierarchy
Show peers
Organization Chart
Collapse/Expand
Print
SUPERINTENDENT
Personnel
School Board
SUPERINTENDENT
Personnel
School Board
PRINCIPAL - HS
Personnel
School Board
PRINCIPAL - MS
Personnel
School Board
VICE PRINCIPAL
Personnel
School Board
VICE PRINCIPAL
Personnel
School Board
Position Details

● Full hierarchy ○ Local hierarchy ☐ Show peers

Position: SUPERINTENDENT
Department: Personnel
Unit: School Board
Authorized Incumbents: 2
Filled Incumbents: 1
Pending Incumbents: 0
Authorized FTEs: 2.0000
Filled FTEs: 1.0000
Pending FTEs: 0.0000
Employee Roster: View Employee Roster
Position Status: NEW
Position Action:
Position Action Reason:
Title: SCHOOL BOARD
Sub-Title: SCHOOL ADMINS

a. Organization Tree Section

The Hierarchy section functions in a similar manner as the Organization Tree widgets that you see throughout the Manager Self Service application. You can navigate through your hierarchy and select positions to see the selection reflected in the Organization Chart. Additionally, the Position Details section will be populated with information for this specific position.



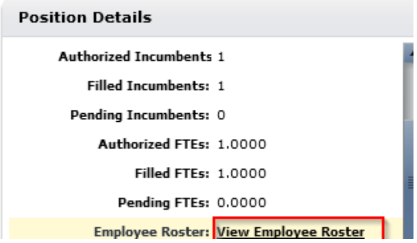
Position Organization Chart

Organization Tree (Position)

- FPH DIV DIR
  - FOFFICE ADMIN
  - FPH PRGM SPVR
  - FPH RN SPVR

b. Position Details Section

Each position box on the Position Organization Chart contains basic information about the position. To view more detailed information about a position, select the position box and the detailed information will display in the **Position Details** section.

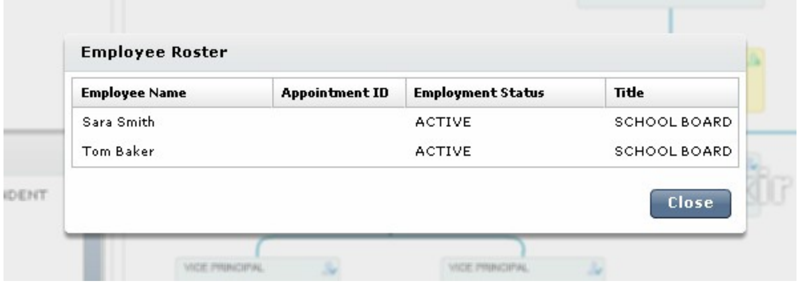


Position Details

Authorized Incumbents 1
Filled Incumbents: 1
Pending Incumbents: 0
Authorized FTEs: 1.0000
Filled FTEs: 1.0000
Pending FTEs: 0.0000
Employee Roster: View Employee Roster

c. View Employee Roster

Select **View Employee Roster** from the **Position Details** section to open the Employee Roster, which displays employees that are assigned to the position.



Employee Roster

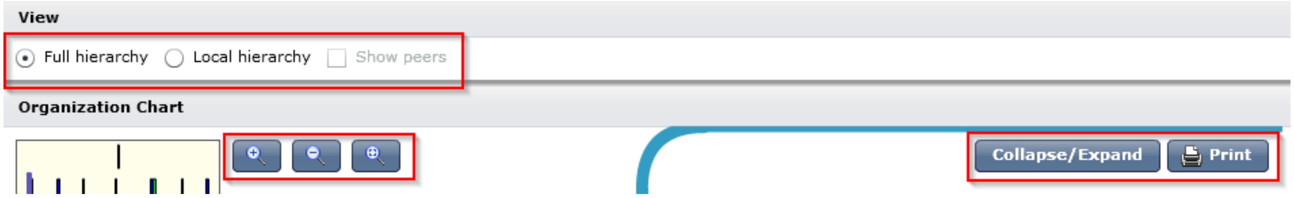
Employee Name	Appointment ID	Employment Status	Title
Sara Smith		ACTIVE	SCHOOL BOARD
Tom Baker		ACTIVE	SCHOOL BOARD

d. Organization Chart Section

The Organization Chart section displays a graphical view of your organization hierarchy. This section displays the organization chart for the logged in user. Users can control the number of levels to display, position or supervisor based reporting hierarchy (if applicable at your site), and the appointment ID/job for which they want to view the chart, by setting these parameters on the Organization Tree widget on the General HR tab.

e. Organization Chart Navigation

The following **View** features can be used on the Organization Chart:


View
● Full hierarchy
○ Local hierarchy
☐ Show peers
Organization Chart
Collapse/Expand
Print

Full Hierarchy - Displays the entire hierarchy with a zoom in/zoom out feature.

Local Hierarchy - For the selected employee, displays the manager above and his/her direct reports below. A single click on an employee shows it on the full view and a double click centers the local Organization Chart on this particular employee.

Show Peers - Shows the employees that have the same superior.

Zoom in/Zoom out - The zoom-in function can be triggered either by moving the chart around or by selecting a sub-set of employees.

Collapse/Expand - Allows you to increase or decrease the size of the organization chart to improve readability.

B. Metrics Sub Tab – not available at Go Live