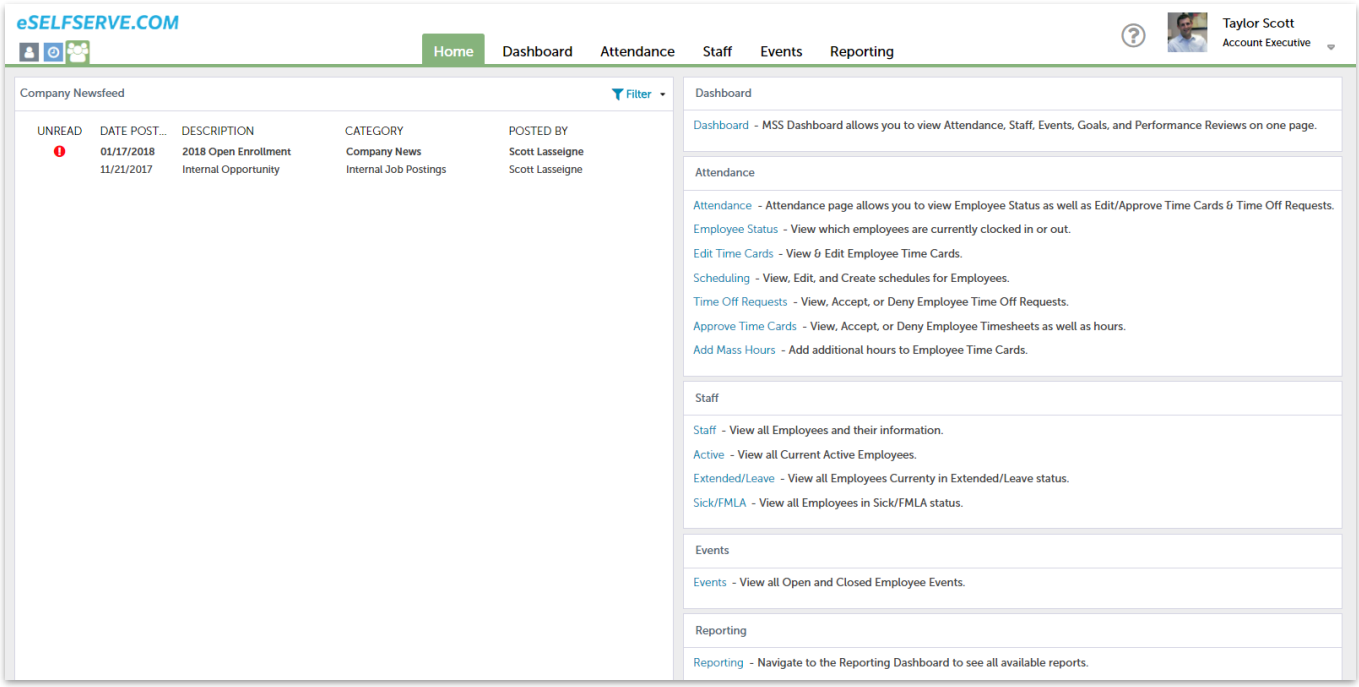
MSS Home Overview

Your Home page will display the Company Newsfeed and links to and descriptions of your MSS options.



Disclaimer: Please note that the visibility of alerts, consoles and pages is based on the features enabled for your company and security restrictions that may be in place. Therefore, not all functionality described in this document may be available to you.

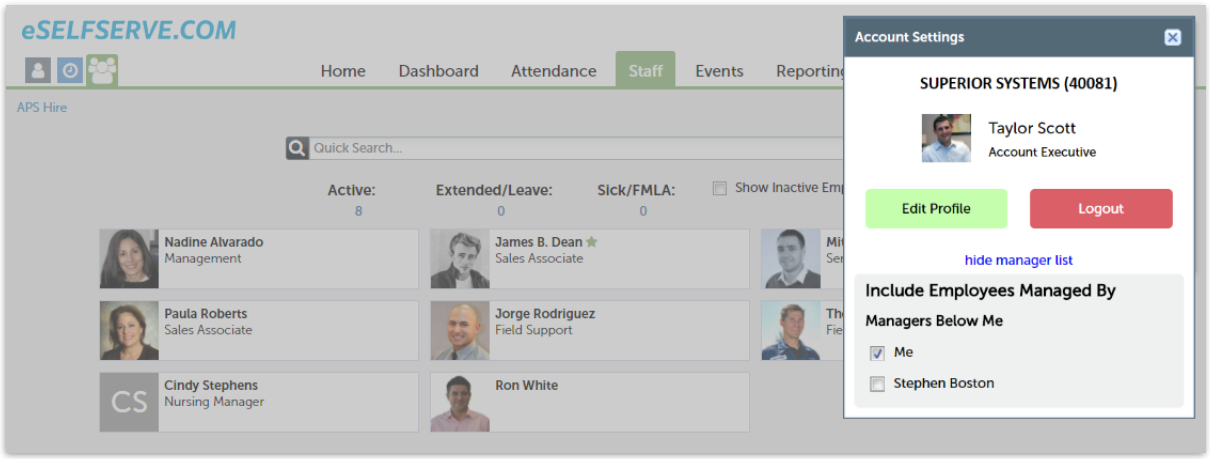
Switching Modes – In the upper left-hand corner of all pages, there are several icons that are used to switch modes:

Employee Mode – This mode is used for viewing and updating your personal information, viewing past vouchers or check stubs and other documents, enrolling in benefits and requesting time off.

Time Clock Mode – This mode is used for reporting your time via a Time Clock or Timesheet.

Manager Mode – This is your default login mode as a manager. Its features are described below.

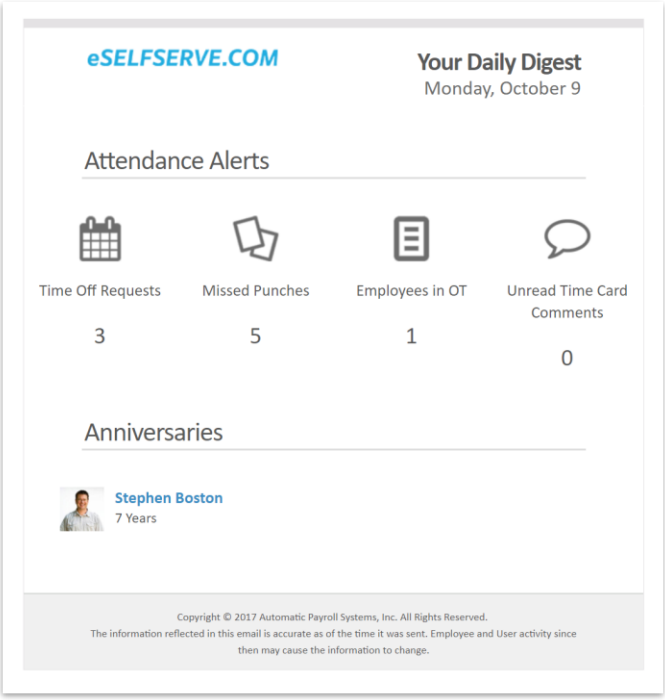
Account Settings – In the upper-right corner of all pages, your user profile will be displayed. Click on it to open the following menu:



This menu allows you to edit your profile and log out of the application. If you manage employees in more than one company, you are able to switch between companies from this menu. Additionally, you may use the hierarchy view to see employees managed by the employees you manage, if applicable.

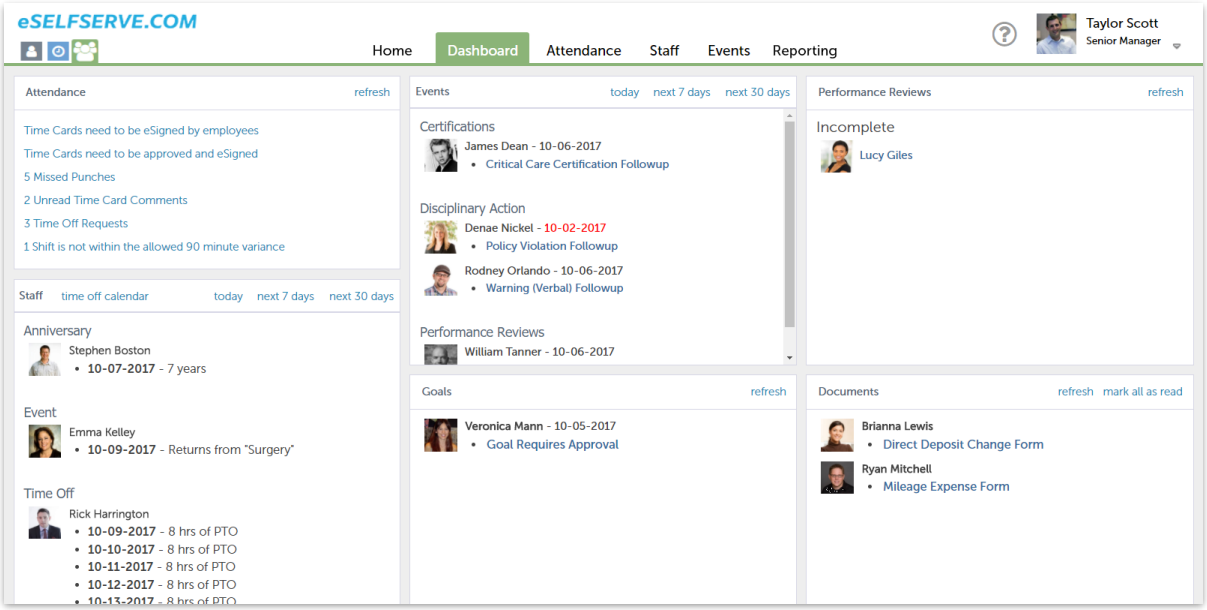
Edit Profile Options – You are able to change your User ID and password and add a personal email address. You may also update your email preferences and subscribe to the Daily Digest.

Daily Digest – The Daily Digest is a daily email sent to your personal address on file that highlights Attendance and Event items for the day. It also keeps you informed of Staff dates (birthdays, anniversaries, sick leave, vacation, etc.) for the day.



MSS Dashboard Overview

Your Dashboard displays Attendance alerts, upcoming Staff dates, Event alerts, and outstanding Performance Reviews, Goals, and Employee Documents.



Dashboard Console

The *Attendance* section of the Dashboard contains several alerts:

- The **Time Cards need to be approved** link will appear after the pay period has ended
- Missed Punches
- Pending Time Off Requests
- Employees in Overtime

Clicking on each alert will take you where you can respond to the alert, whether it is to approve time cards, correct missed punches or manage time off requests.

The *Events* section of the Dashboard will alert you to upcoming employee events and event follow-ups (if applicable). Clicking on each alert will take you to the employee's event page.

The *Staff* section of the Dashboard will notify you of upcoming dates related to your staff. Staff birthdays, work anniversaries and scheduled time off will appear here and be grouped by category.

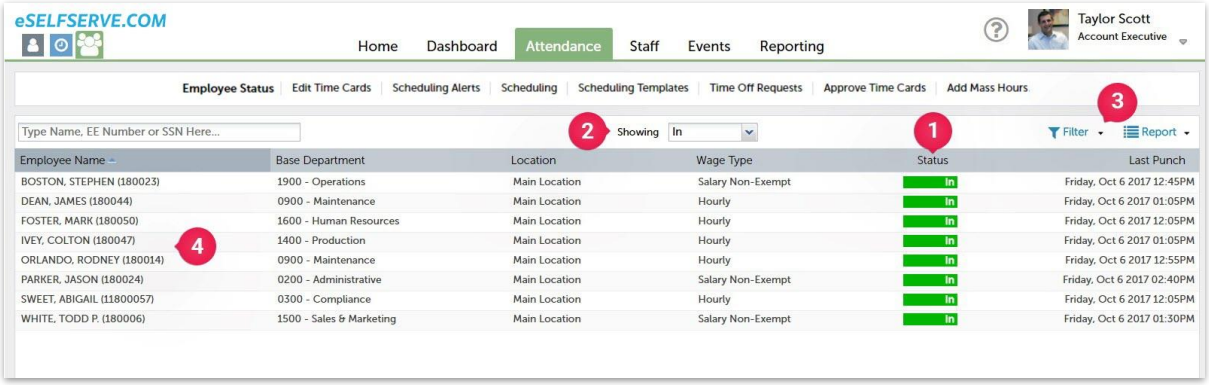
Other sections may include outstanding Performance Reviews, Employee Goals, and Employee Documents.

MSS **Attendance Overview**

The *Attendance* console allows you to manage your employees' time, respond to time off requests, approve time cards, and access employee reports.

Employee Status Page

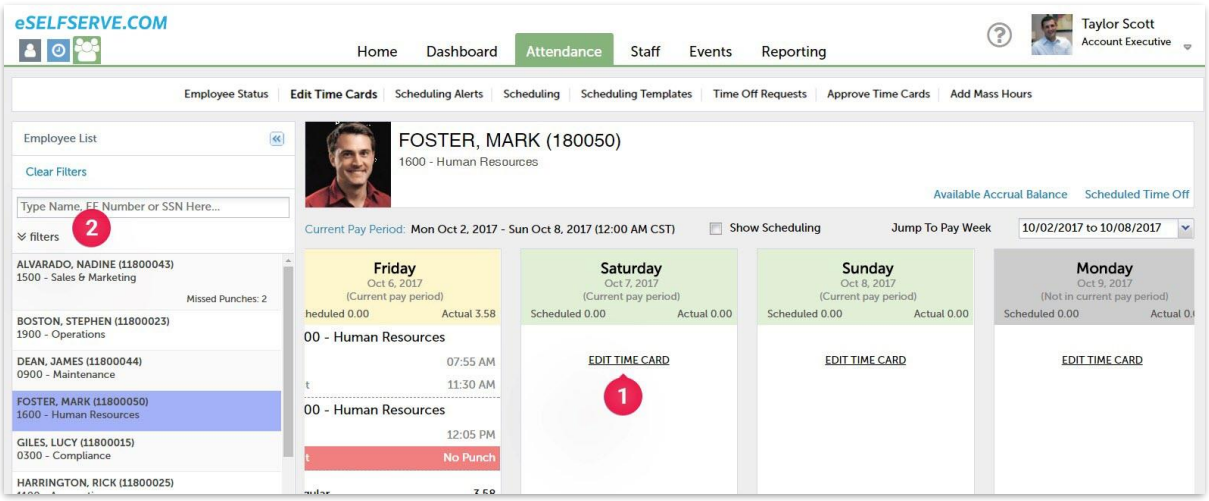
1. Quickly see the clock status of your employees.
2. Choose to see which employees are **In**, **Out**, **On Break**, or **All** to see everyone.
3. Filter the list using the menu in the upper-right corner.
4. Double-clicking on an employee will take you to that employee's Time Card.



Employee Status page under the Attendance tab

Edit Time Cards Page

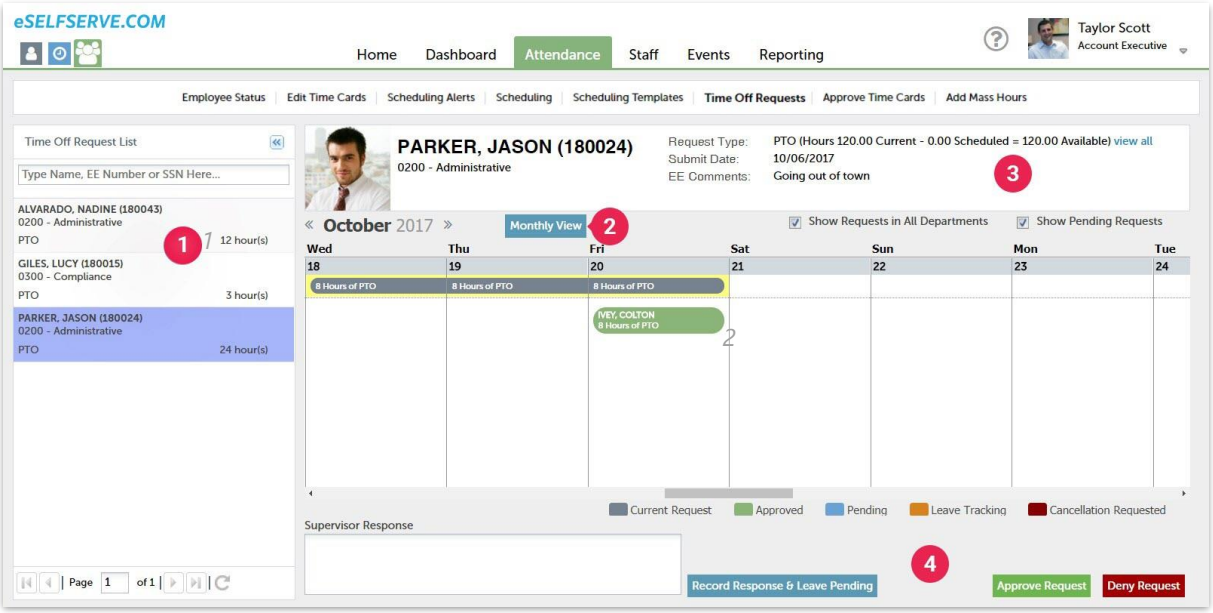
1. Click **EDIT TIME CARD** to add/edit shift information or manage additional pay items.
2. Search by an employee's name or number. Use the *filters* to display only employees who have missed punches.



Edit Time Cards page under the Attendance tab

Time Off Requests Page

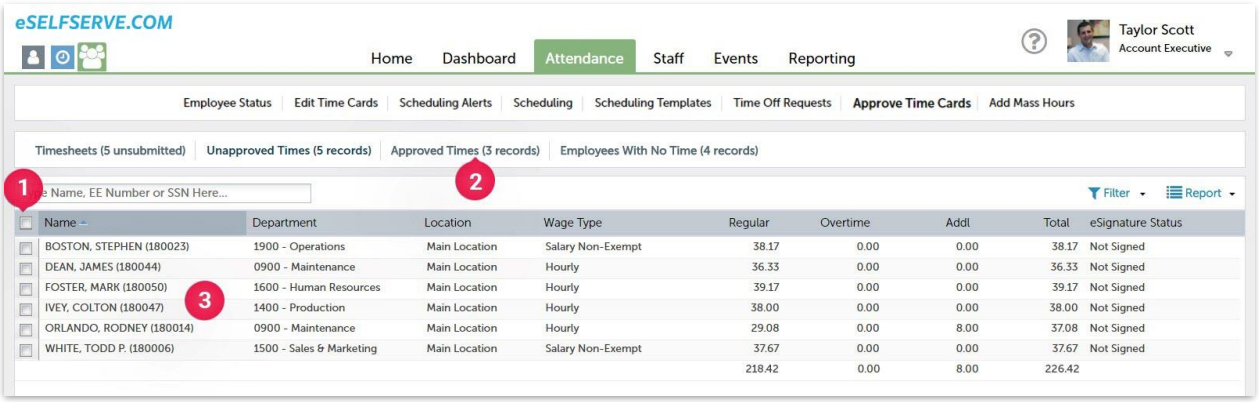
1. Choose an employee to review pending Time Off Requests that have been submitted.
2. Switch between a *Monthly* and *Weekly* view of the calendar.
3. The employee's requested days, as well as available leave balances will be here.
4. You may include a response and approve or deny the request. To leave the request as pending, select **Record Response & Leave Pending**.



Time Off Requests page under the Attendance tab

Approve Time Cards Page

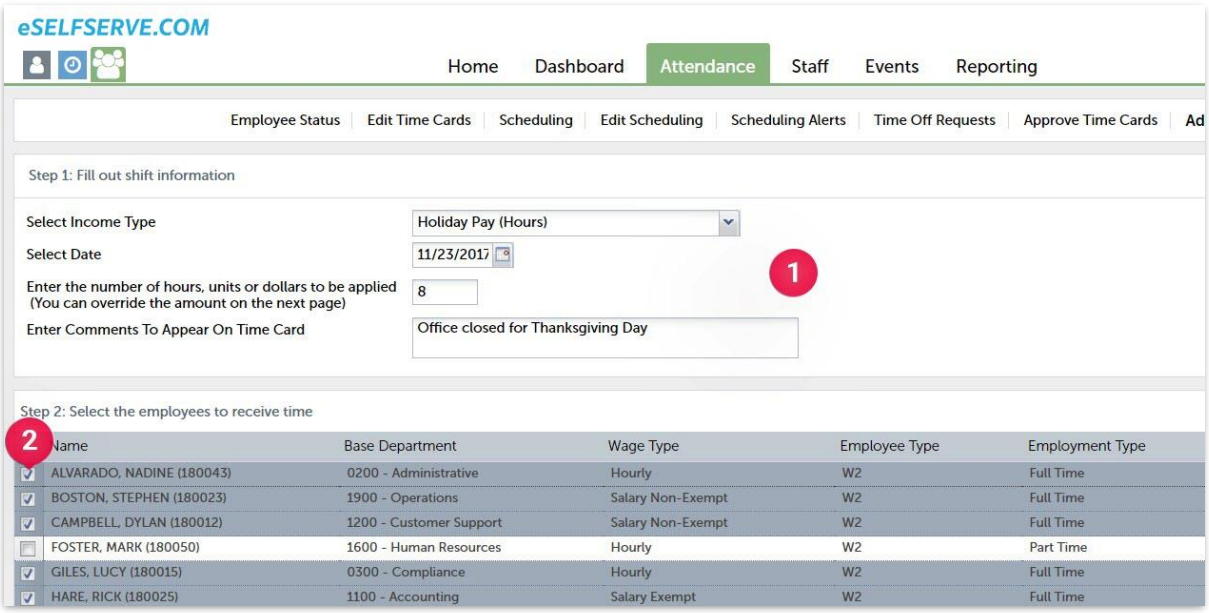
1. To approve time cards, check the employees whose times are correct and mark them as approved by selecting **Approve Checked Times** at the bottom of the page. To make changes to a time card before approving it, double-click the employee to go to the time card.
2. To make changes (prior to payroll) to time cards that you have previously approved, select the *Approved Times* tab. Check which employee time cards you need to make changes to and select **Unapprove Checked Times** at the bottom of the page. You may now edit the time cards.
3. Double-clicking on an employee will take you to that employee's time card.



Approve Time Cards page under the Attendance tab

Add Mass Hours Page

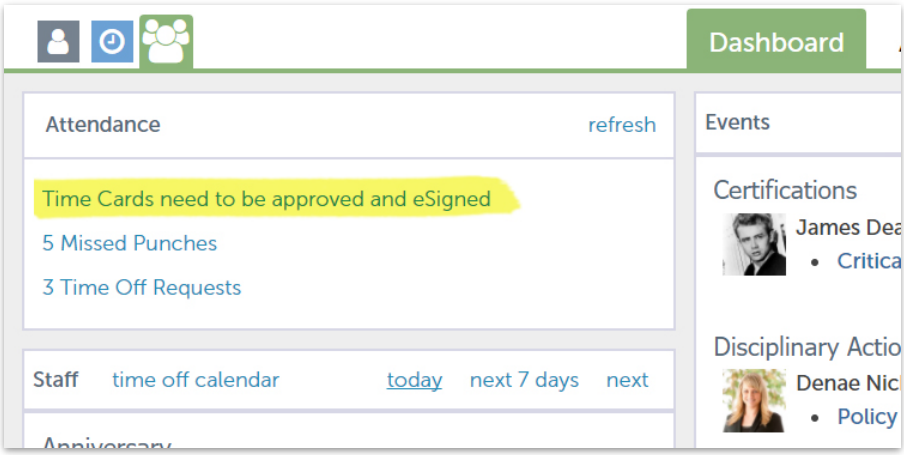
1. To assign hours to more than one employee at a time, first fill out the shift information in **Step 1**.
2. Check the employees you want to add hours to and click **Review Entries** at the bottom. Upon review, you can change the number of hours per employee by clicking the hours. Once you have reviewed the information on the next page, choose **Save** at the bottom.



Add Mass Hours page

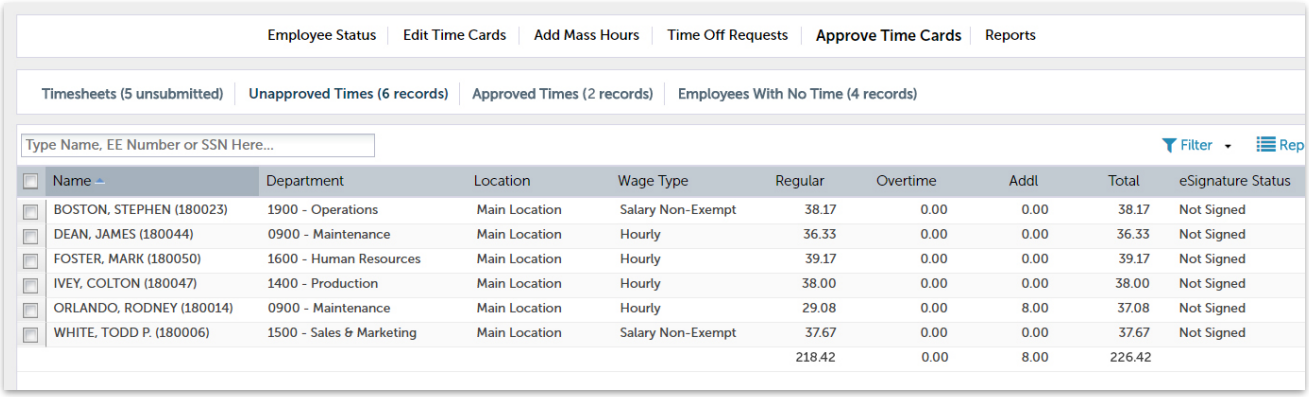
MSS **eSigning Time Cards**

At the end of the pay period you will be prompted to approve and electronically sign (eSign) your employees' time cards. You will see the alert on your dashboard in Manager Self-Service.



Dashboard in MSS

Click on the alert to go to the *Approve Time Cards* page.

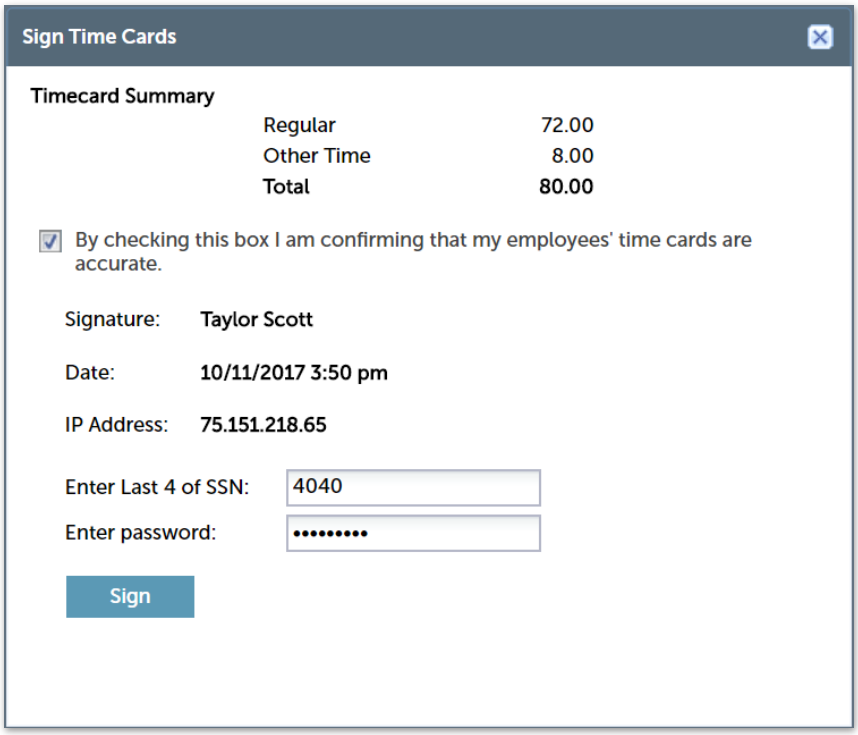


Name	Department	Location	Wage Type	Regular	Overtime	Addl	Total	eSignature Status
BOSTON, STEPHEN (180023)	1900 - Operations	Main Location	Salary Non-Exempt	38.17	0.00	0.00	38.17	Not Signed
DEAN, JAMES (180044)	0900 - Maintenance	Main Location	Hourly	36.33	0.00	0.00	36.33	Not Signed
FOSTER, MARK (180050)	1600 - Human Resources	Main Location	Hourly	39.17	0.00	0.00	39.17	Not Signed
IVEY, COLTON (180047)	1400 - Production	Main Location	Hourly	38.00	0.00	0.00	38.00	Not Signed
ORLANDO, RODNEY (180014)	0900 - Maintenance	Main Location	Hourly	29.08	0.00	8.00	37.08	Not Signed
WHITE, TODD P. (180006)	1500 - Sales & Marketing	Main Location	Salary Non-Exempt	37.67	0.00	0.00	37.67	Not Signed
				218.42	0.00	8.00	226.42	

Approve Time Cards Screen

Select the time cards you wish to approve and choose **Approve Checked Times**. You will be prompted to eSign your employees' time cards.

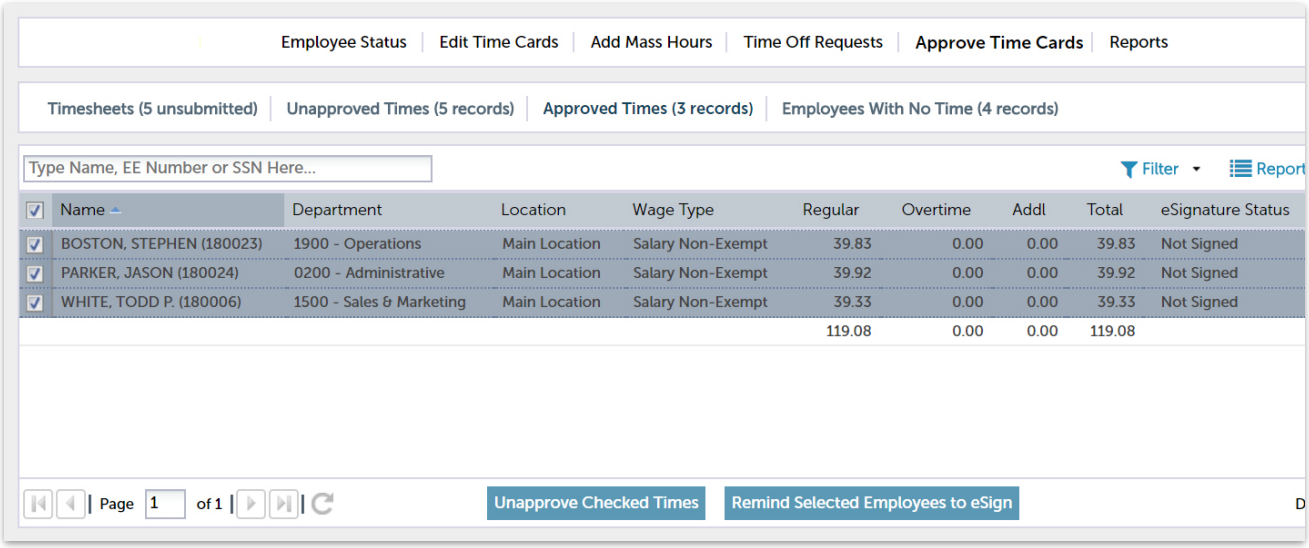
Enter the last four digits of your SSN and your eSELFSERVE.COM password into the respective boxes and choose **Sign**. Your employees will then be prompted to eSign their own time card.



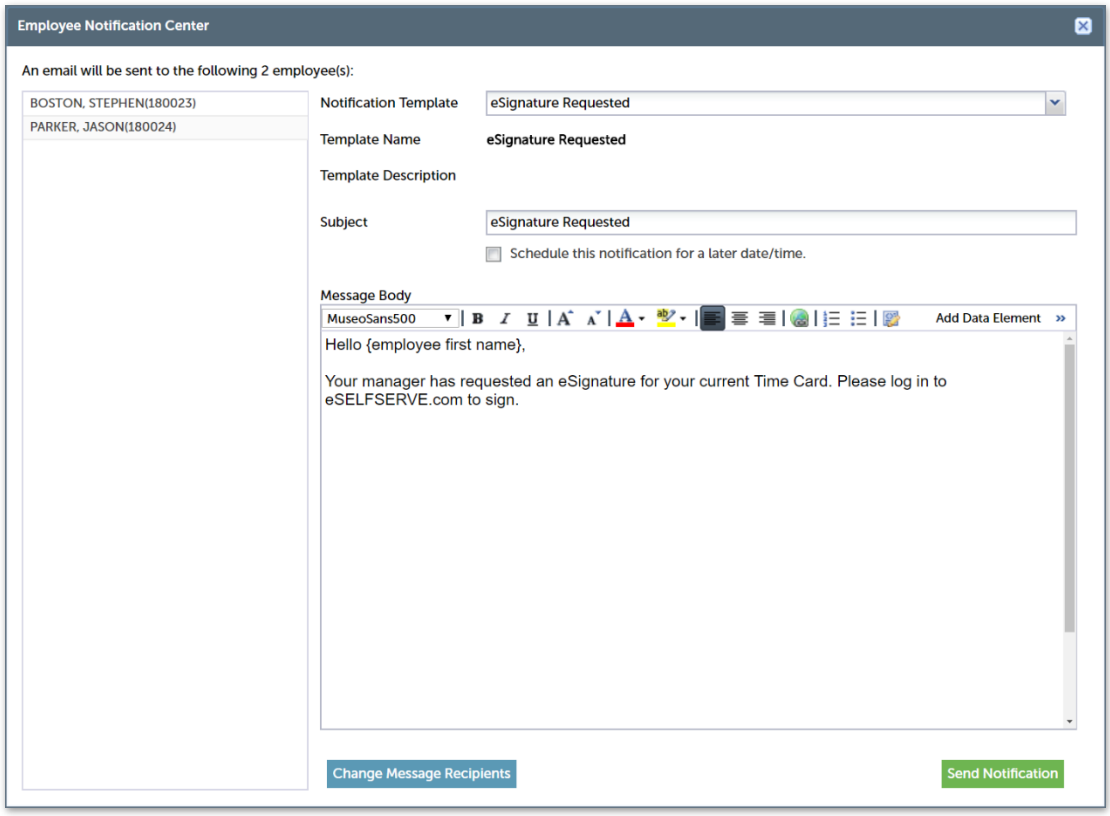
eSign Time Cards Screen in MSS

> **NOTE:** If you unapprove a time card, your eSignature and the employee's eSignature will be removed, and the process will repeat.

Once you approve and eSign your employees' time cards, you can send a reminder to employees to eSign their time cards from the *Approved Times* tab.



Choose **Remind Selected Employees to eSign**. This will open the *Employee Notification Center*.

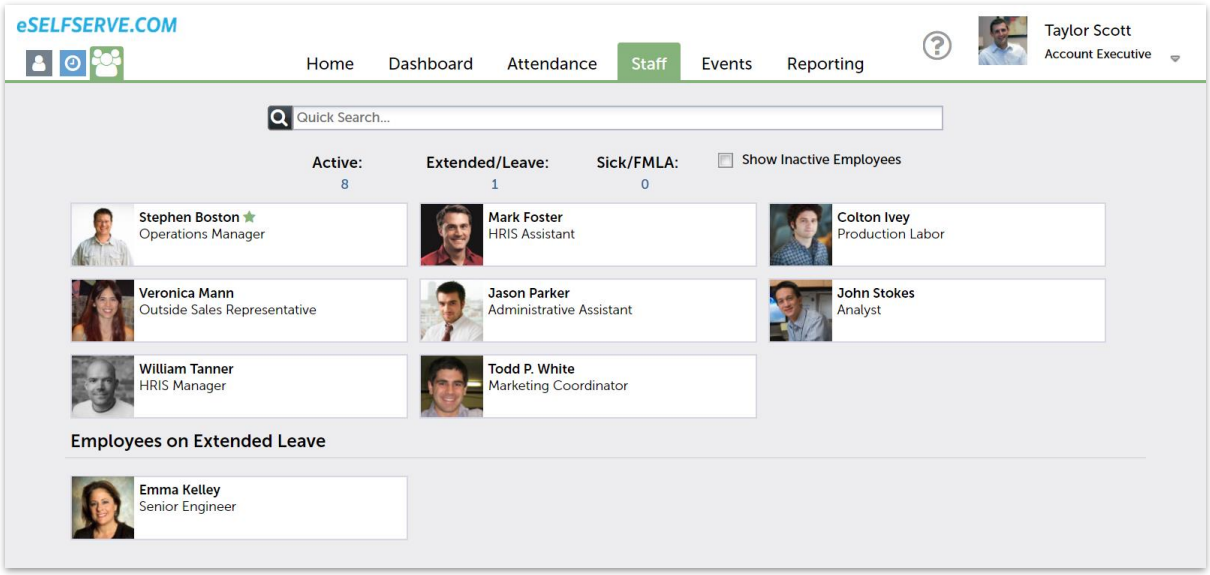


Employee Notification Center

Edit the message or send as is. You can also schedule the notification to go out at a later time. Only employees with email addresses can be sent messages.

NOTE: You must correct all missed punches and manage all time off requests before you can approve and eSign employee time cards.

The *Staff* tab shows all employees in your group. A star indicates that person is also a manager of employees. To see the employees in that person's group, from your User Profile, check the box next to that person. Those employees will now be included in your view. Click an employee to access that employee's record.



Staff list as shown on the Staff tab

The following staff pages are available based on the services your company subscribes to and your security role:

The *Demographics* page allows you to view basic demographic information about an employee, including contact information, general work information (Base Department, Job Title, etc.) and emergency contact information.
The *Attendance* page provides the same functionality as the *Edit Time Card* page.

The *Pay* page provides information on YTD compensation, check stubs and vouchers, and tax forms.

The *Accruals* page provides information on an employee's current accrual balances.

The *Benefits* page provides information on an employee's current and pending enrollments in benefit plans.

The *Events* page allows you to view Events that have been created for the employee. You may also add and edit Events based on your company's settings.

The *Assets* page allows you to view and edit records for company assets that have been issued to the employee.

The *Rates & Deductions* page allows you to view information related to the employee's earnings and/or deductions.

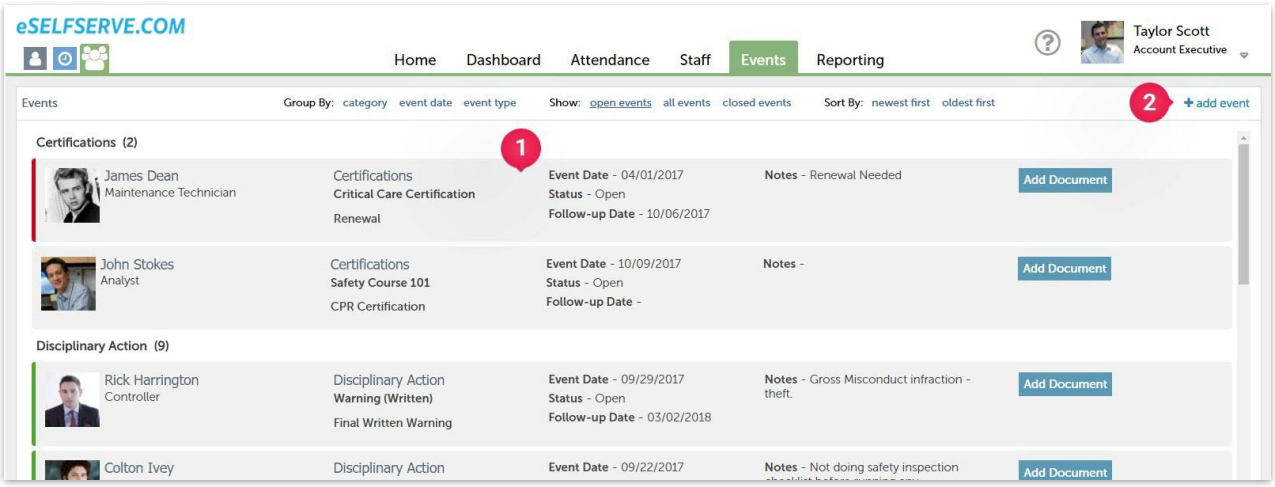
The *Documents* page allows you to view and upload employee documents.

The *Reviews* page allows you to conduct and manage Performance Reviews for that employee.

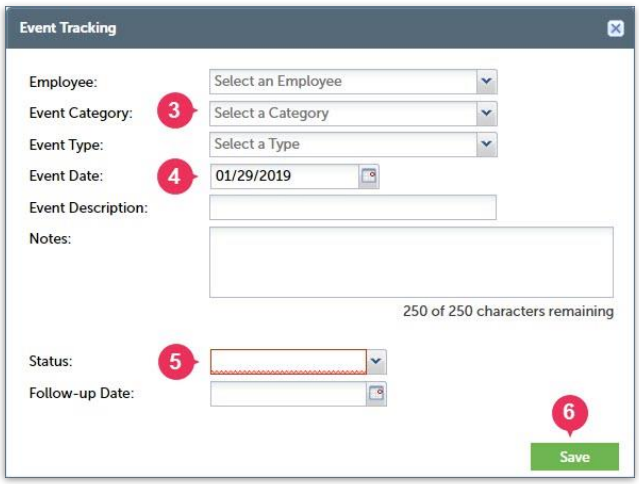
The *Events* tab allows you to see events scheduled for your employees. You may also add events and/or edit current events based on your permissions. Events are ordered by category and are color-coded:

- GREEN means the Event is *Open* and due in the future.
- RED means the Event is *Open* and due or past due.
- No color means the Event is *Closed* and no further action is needed.

1. Click an Event to view its details. Open Events can be edited; Closed Events are locked. You may still view details, but you cannot edit the Event.
2. To add an Event, choose + add event.



3. An Event Tracking window will pop up. Choose the *Employee*, *Event Category* and *Event Type* from the drop-down menus.
4. Select the date of the event, add a *Description* and *Notes*.
5. Mark the *Status* as **Open** if the event will be completed in the future or **Closed** if no further action is required. Include a *Follow-up Date* if necessary.
6. **Save** the event. It will now appear in your list and on that employee's record under *Events*.



NOTE: You may also add an event for an employee through the *Events* tab of the employee's record.

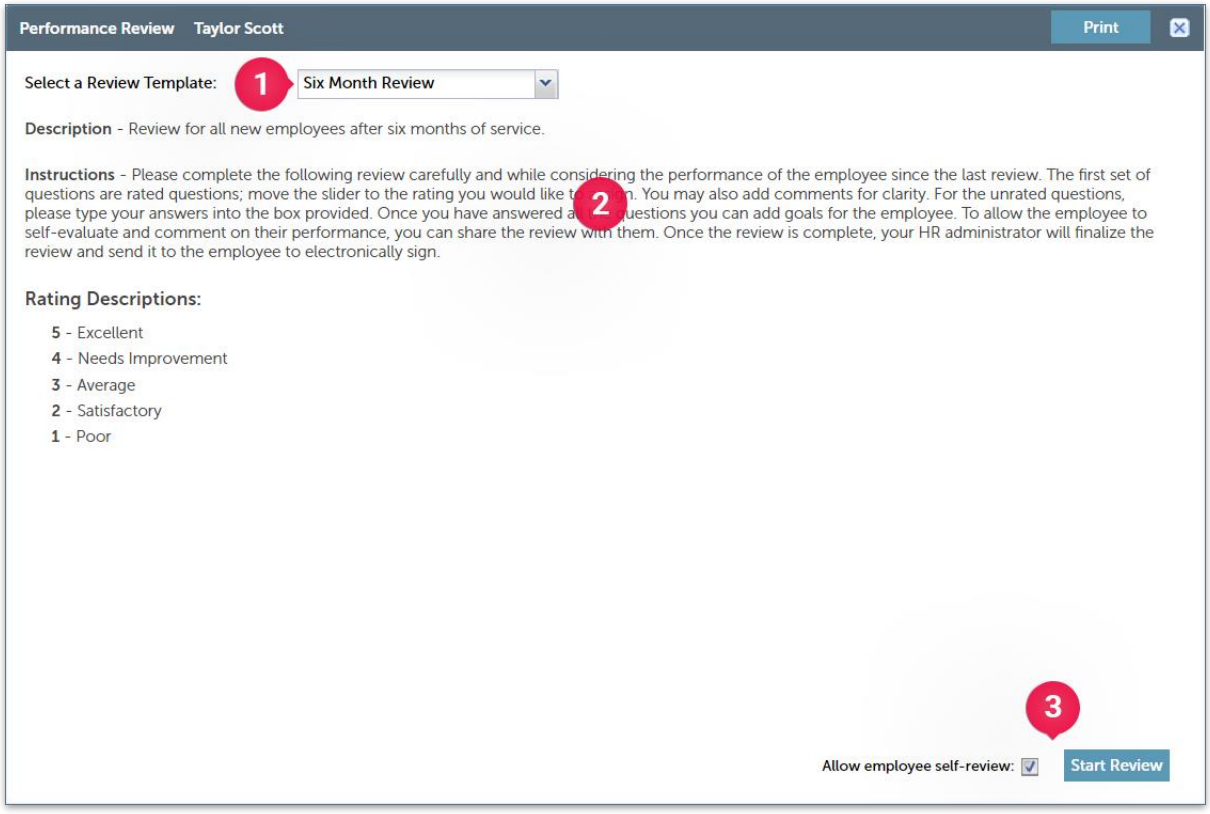
You can view and conduct goal-based *Performance Reviews* for your managed employees in Manager Self-Service. Notifications of scheduled reviews will appear on your dashboard under *Events*. Clicking the event will bring you directly to it in the employee's record. All reviews must be approved and committed by HR. This document will guide you through conducting a Performance Review.

CONDUCTING A PERFORMANCE REVIEW

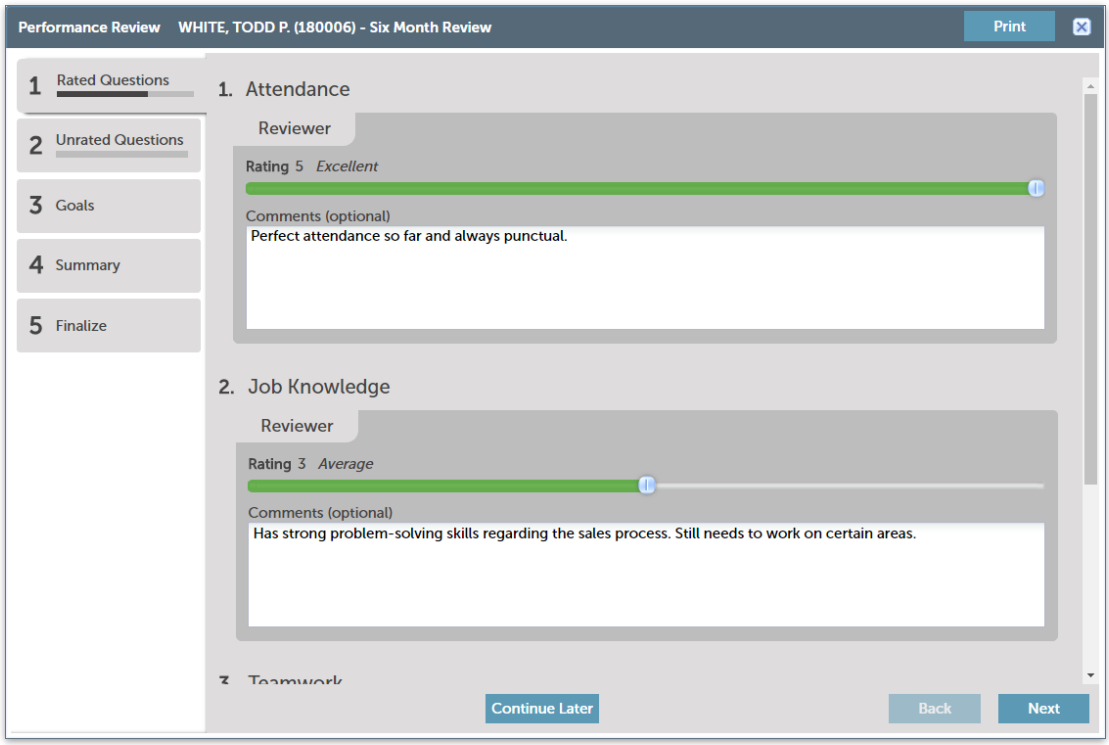
To start a performance review, go to the *Reviews* section of the employee record. Click +add review beside *Reviews*.

1. Choose the template you will be using from the drop-down menu.
2. Instructions from HR will appear here.
3. Select **Allow employee self-review** if you would like the employee to self-review. Both you and the employee will be able to complete the review simultaneously. The employee will not see your comments. You may or may not see the employee's comments, depending on the settings set by HR.

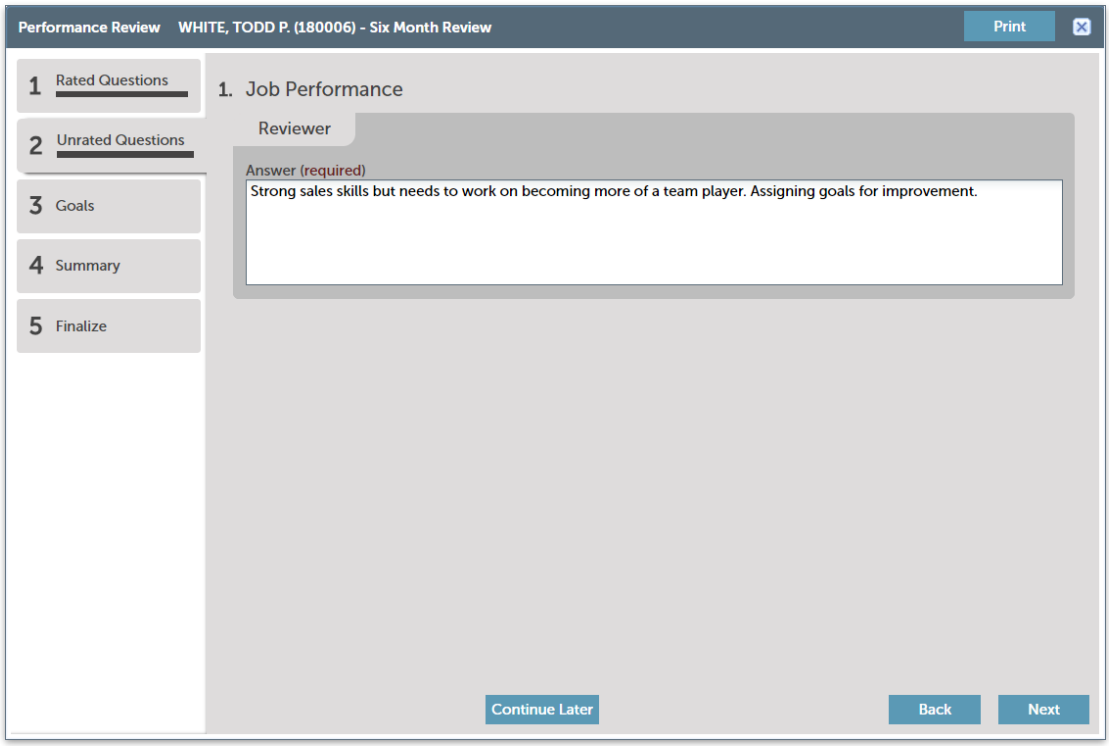
Select **Start Review** to begin.



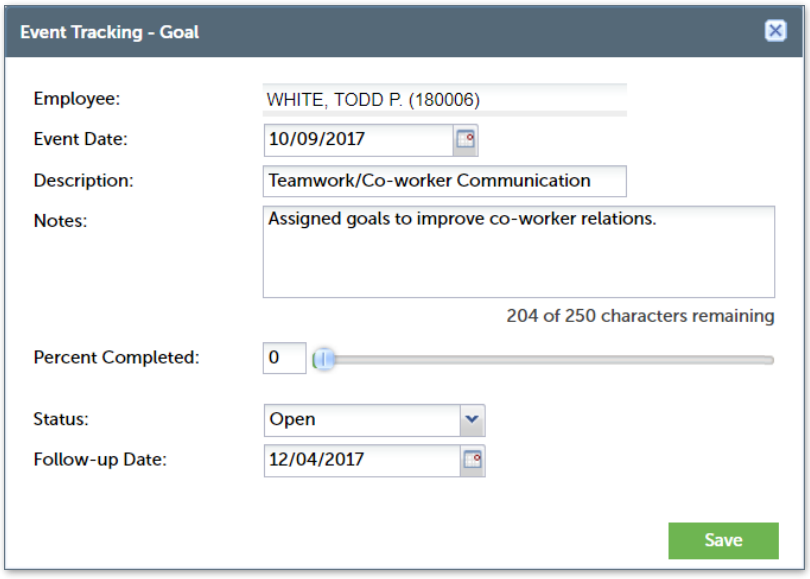
Complete each section in order to proceed. For *Rated Questions*, move the slider to the number you would like to assign and add comments. Choose **Next** to proceed or **Continue Later** to save the review in order to complete it later.



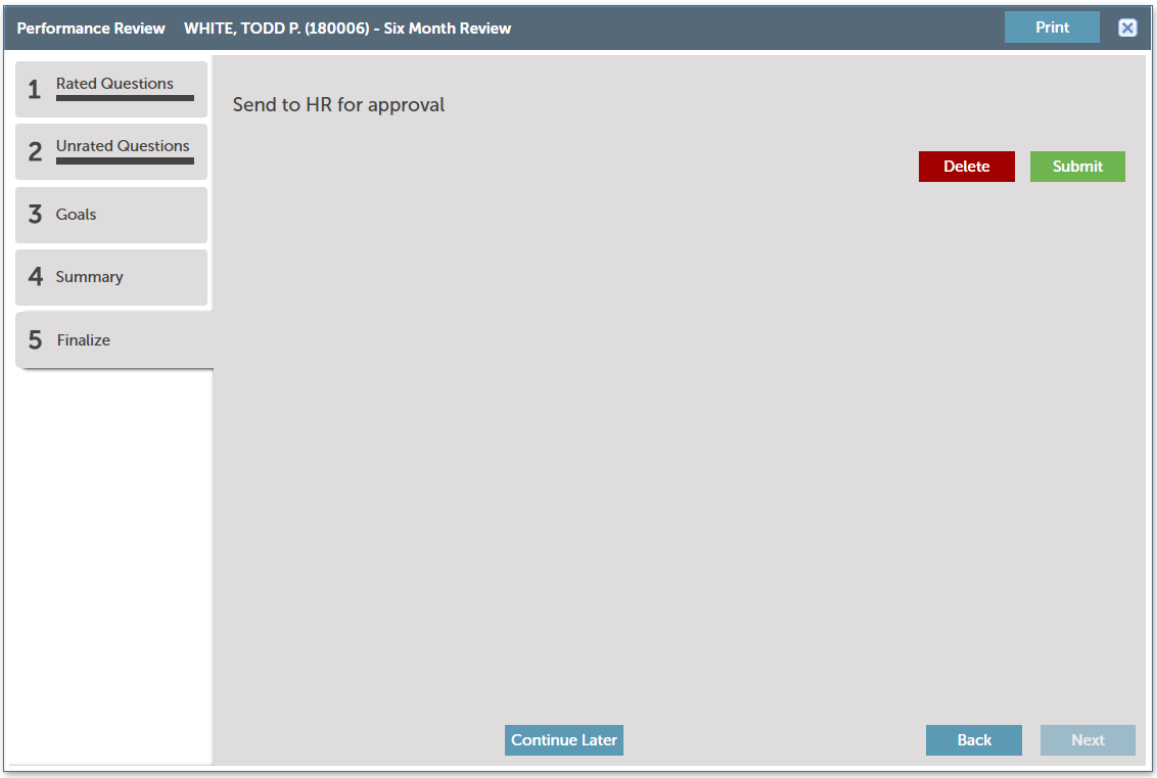
For *Unrated Questions*, type your answer into the box.



To add *New Goals* (optional), click + add goal. Fill in the information and click **Save**. The goals will now appear on the review. They will read *Unapproved* until the review is approved and committed by HR. You can change the *Percent Complete* once the goal has been submitted by going to the *Goals* section of the employee's *Reviews* tab.

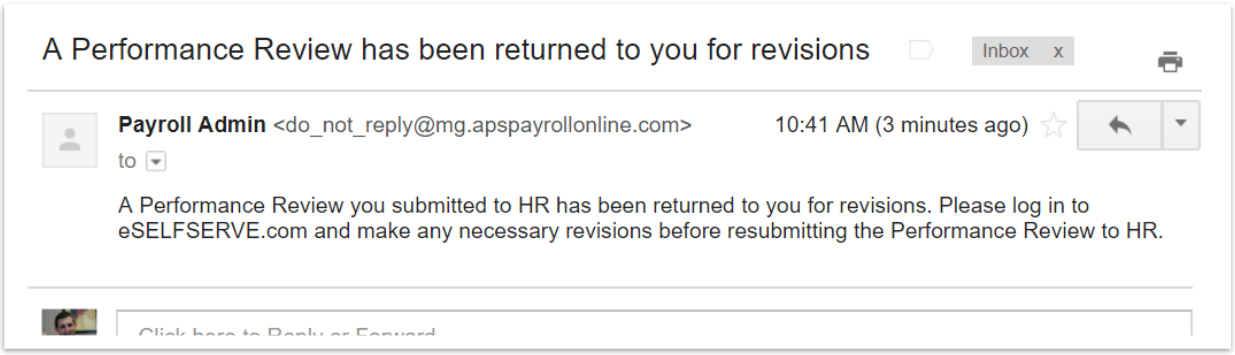


To complete the review, review the information in the *Summary* tab and choose **Next** to go to the *Finalize* tab. Choose **Submit** to send the review to HR for approval.



The review will now appear under *Reviews* on the employee record. The status will read *Pending HR Approval* or *Employee to Comment* until it is approved and committed by HR or the self-review is completed by the employee.

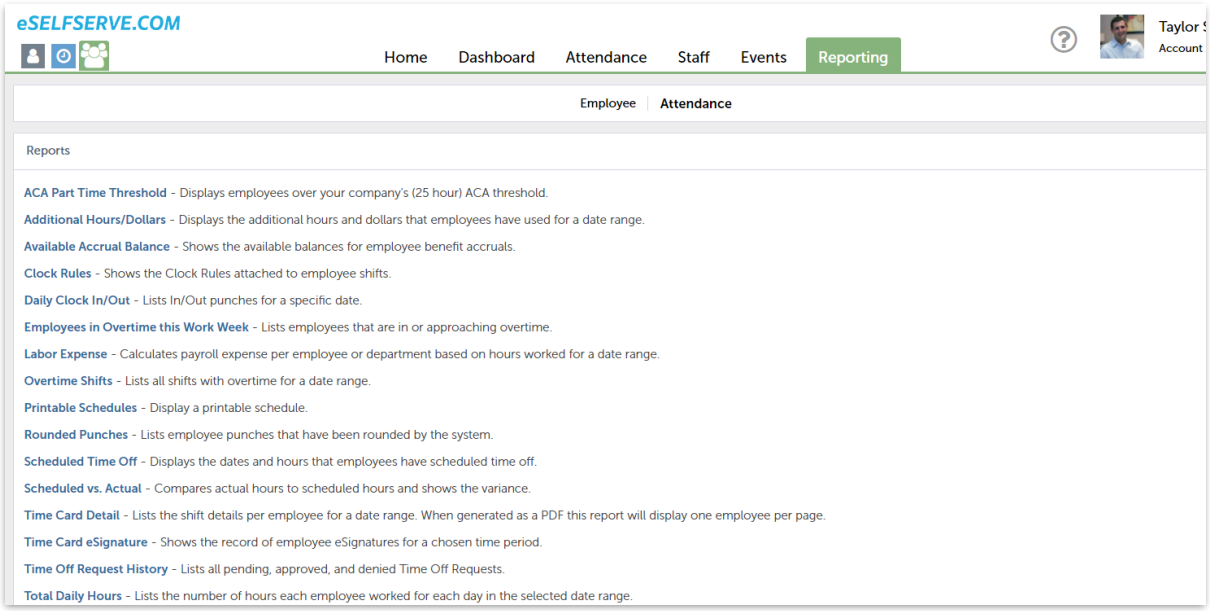
After reviewing the submitted performance review, HR may return it to you for changes. If so, you will receive an email notification.



After you make the requested changes, you must resubmit the review. Once HR approves the review, it will be sent to the employee to electronically sign, and the status will read *Awaiting Employee Signature*.

When the employee has viewed and signed the review, the status will read *Complete* and the date completed will appear. No further action is necessary.

Use the *Reporting* tab to access Employee and Attendance reports.



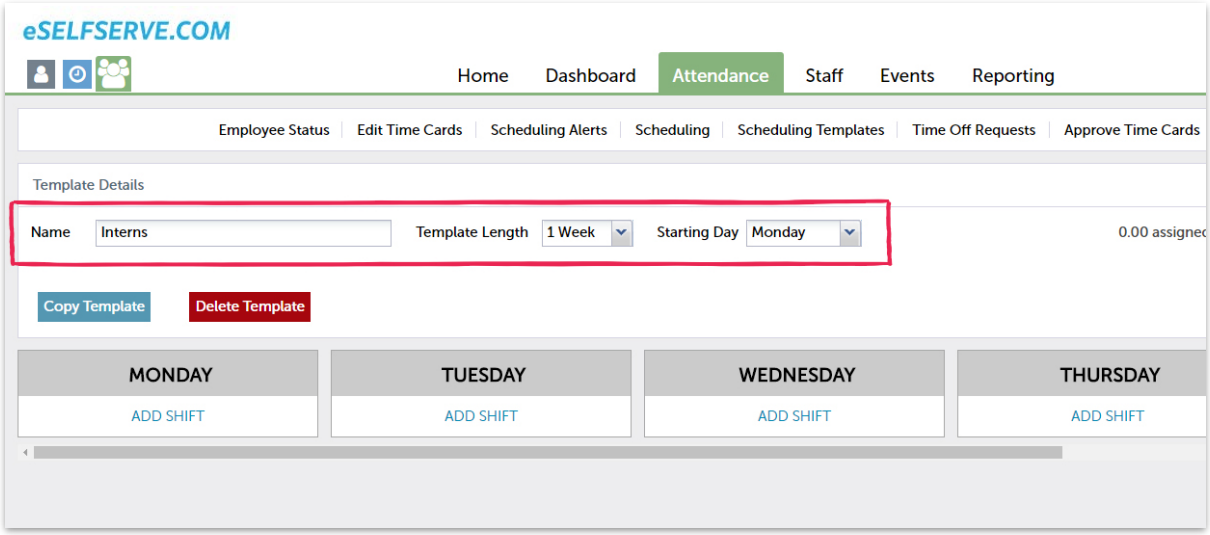
Reporting tab

- Run several reports related to Attendance, such as *Employees in Overtime this Work Week* and *Time Card Detail*.
- Choose the report, fill in desired information, and **Run Report**.
- You may download as a PDF or print directly from the console.

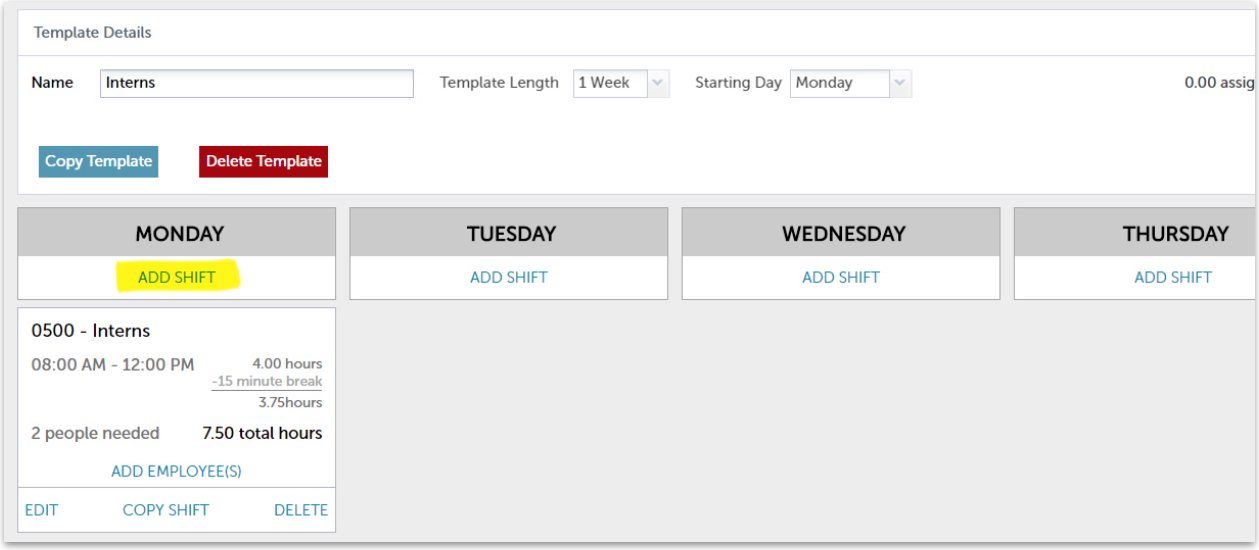
Creating Scheduling Templates

> NOTE: You will create a template to use for employee schedules. Templates do not include specific dates. They do include shifts and employee assignments.

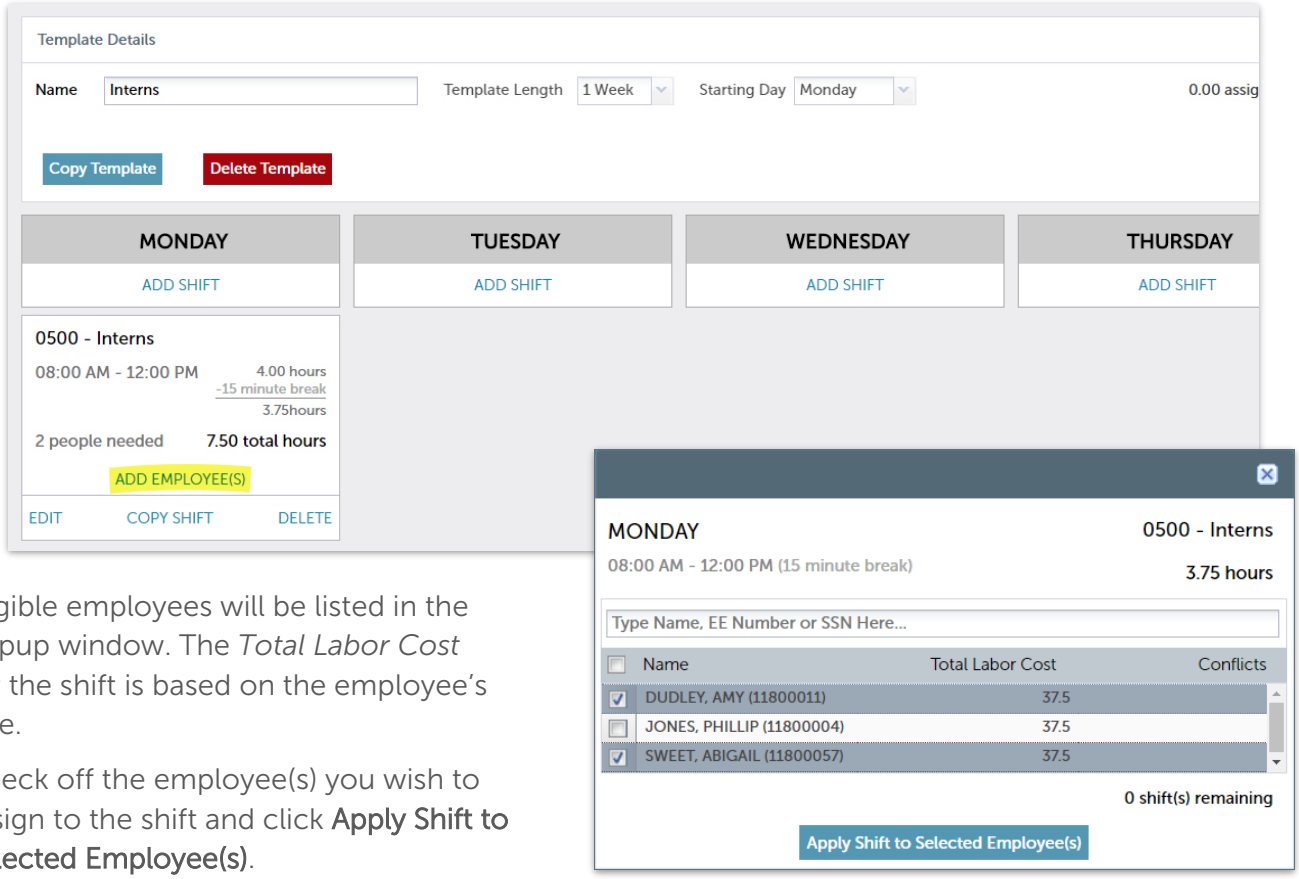
Go to **Attendance** > **Scheduling Templates** and click **Create Template**. Fill in the template *Name*, *Template Length*, and *Starting Day*.



Add shifts for each day to fill in the template. You will select the *Department*, *Start* and *End* times, *Break* time, and number of *People Needed* for each shift. **SAVE** when complete.



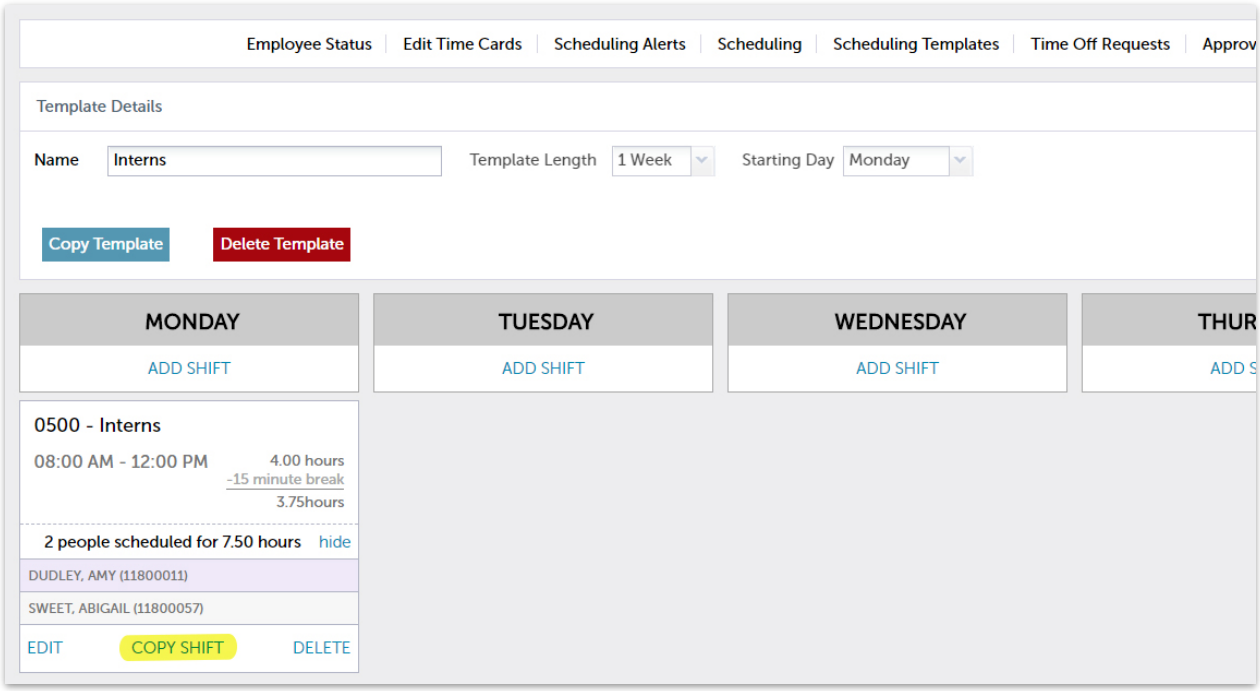
Click **ADD EMPLOYEE(S)** to assign employees to the shift.



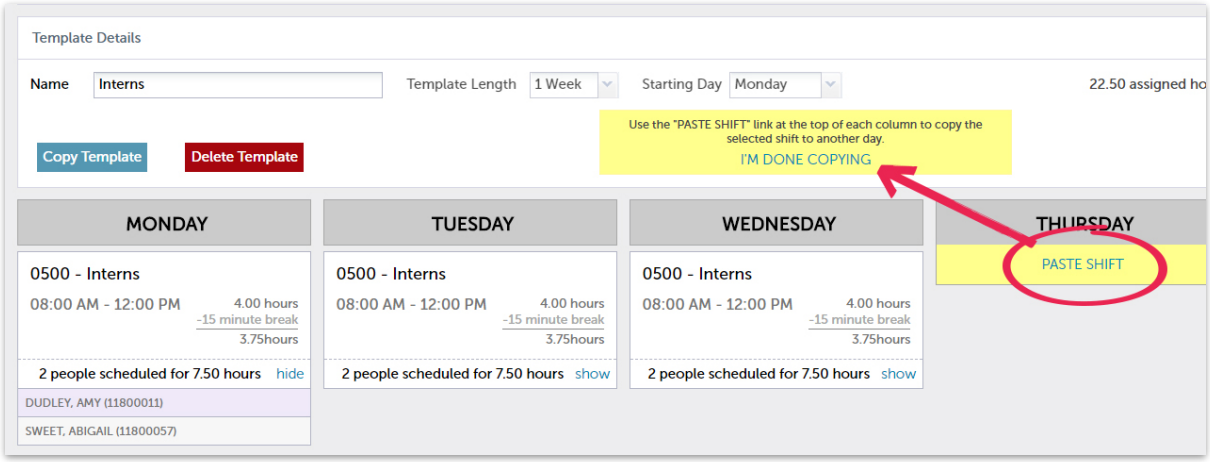
Eligible employees will be listed in the popup window. The *Total Labor Cost* for the shift is based on the employee's rate.

Check off the employee(s) you wish to assign to the shift and click **Apply Shift to Selected Employee(s)**.

To copy shifts from day to day, click **COPY SHIFT**. Employee assignments will carry over when copying shifts.



Click **PASTE SHIFT** on the days you wish to copy the shift to and click **I'M DONE COPYING** at the top when finished.



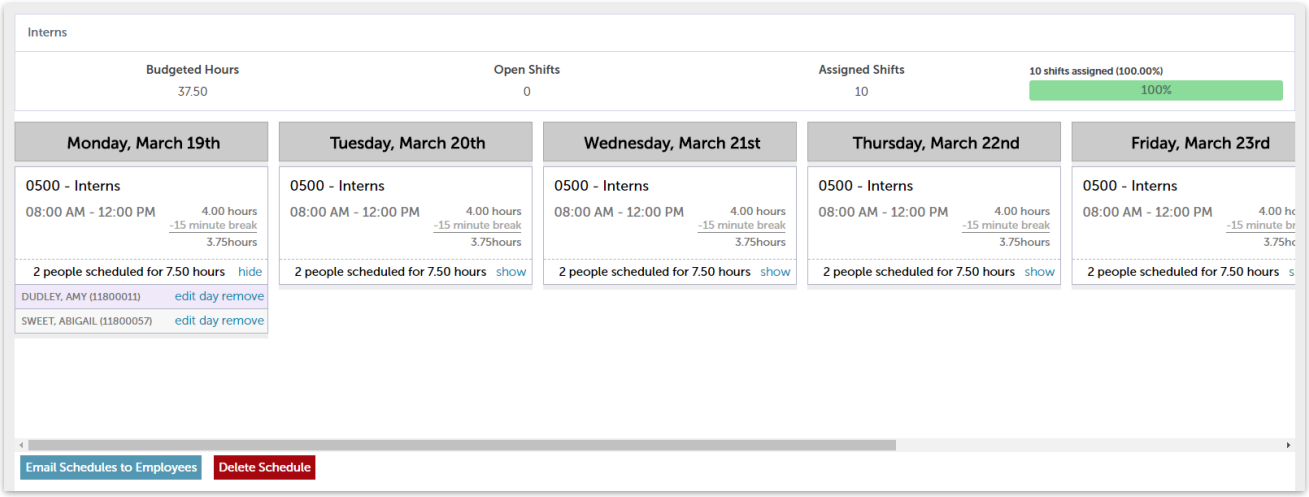
Use the *EDIT* and *DELETE* links to make changes to or delete shifts.

> **NOTE:** Be sure to fil out the template completely. If you create a two-week template and only fill out the first week, the second week of every schedule created with this template will be blank.

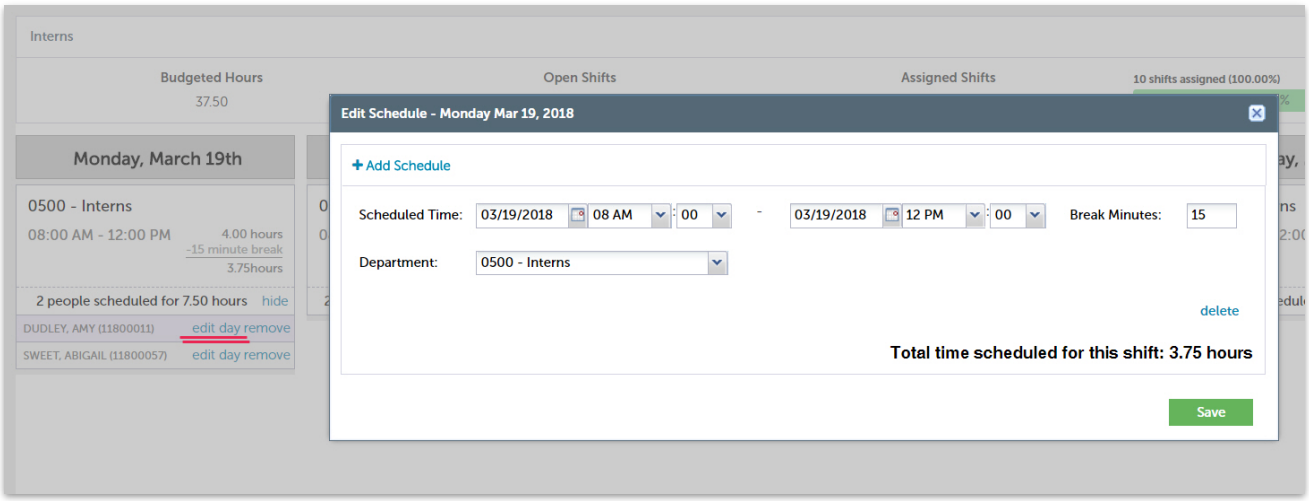
You can always come back and make changes to templates as needed for new schedules.

Creating Employee Schedules

Go to **Attendance** › **Scheduling** and click **Create Schedule**. Choose the template you would like to use to create the schedule and then choose the date range to be covered.

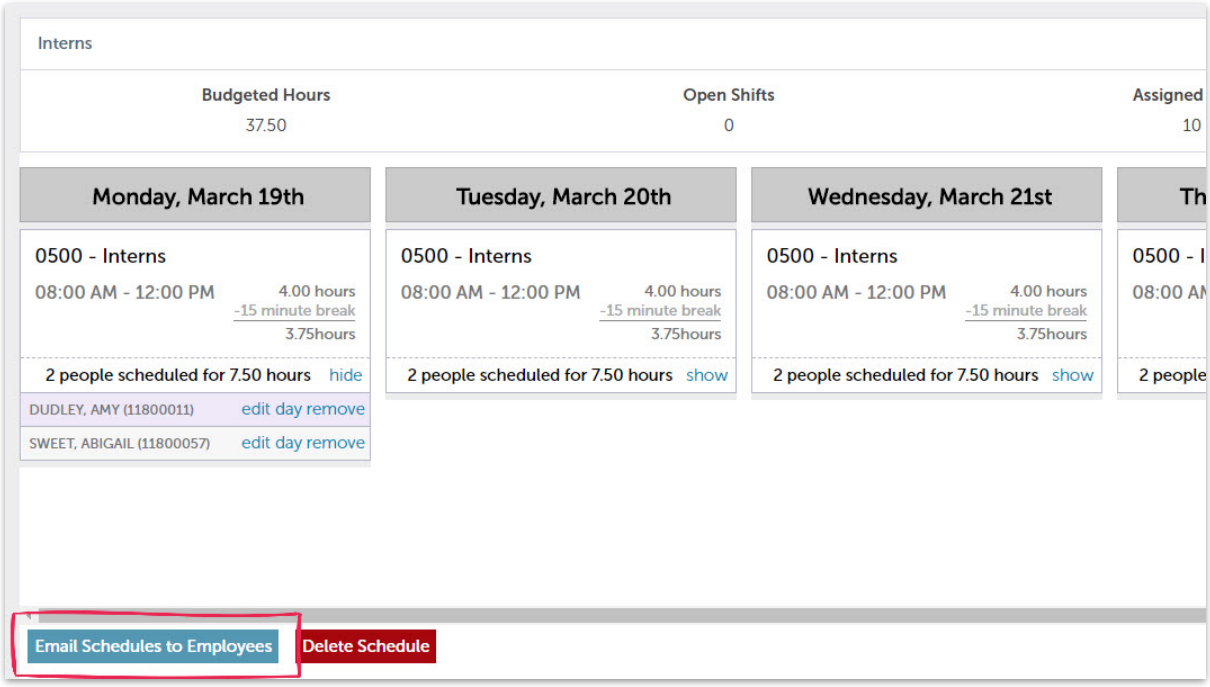


Since you assigned employees on the template, employees will be assigned on the schedule. You can update an employee's scheduled time if they are already on the schedule by clicking **edit day** on the shift you need to adjust.



NOTE: Changes made on the schedule will not flow back to the template.

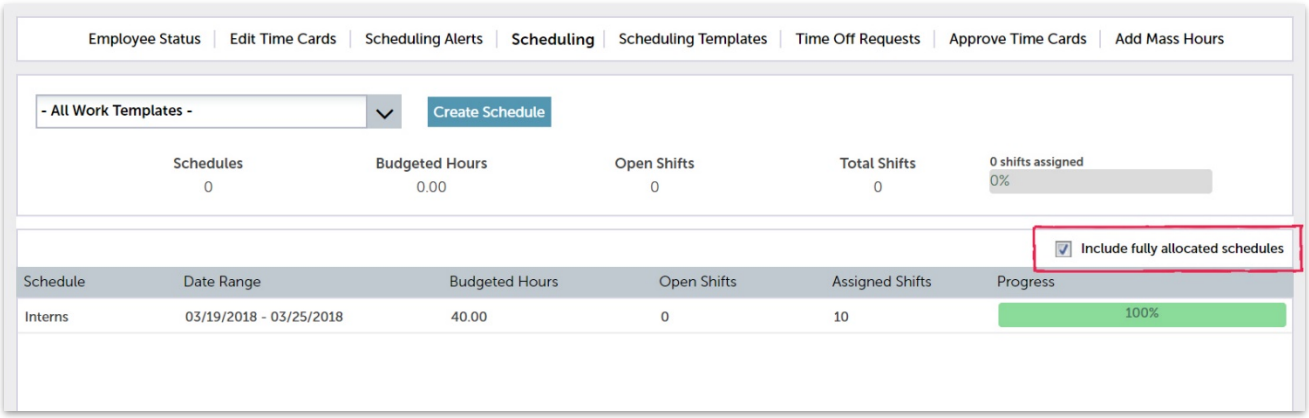
Click the **Email Schedules to Employees** button to send each employee an email of their personal schedule.



Employees can also log in to eSELFSERVE.COM to see their personal schedules.

Viewing and Editing Employee Schedules

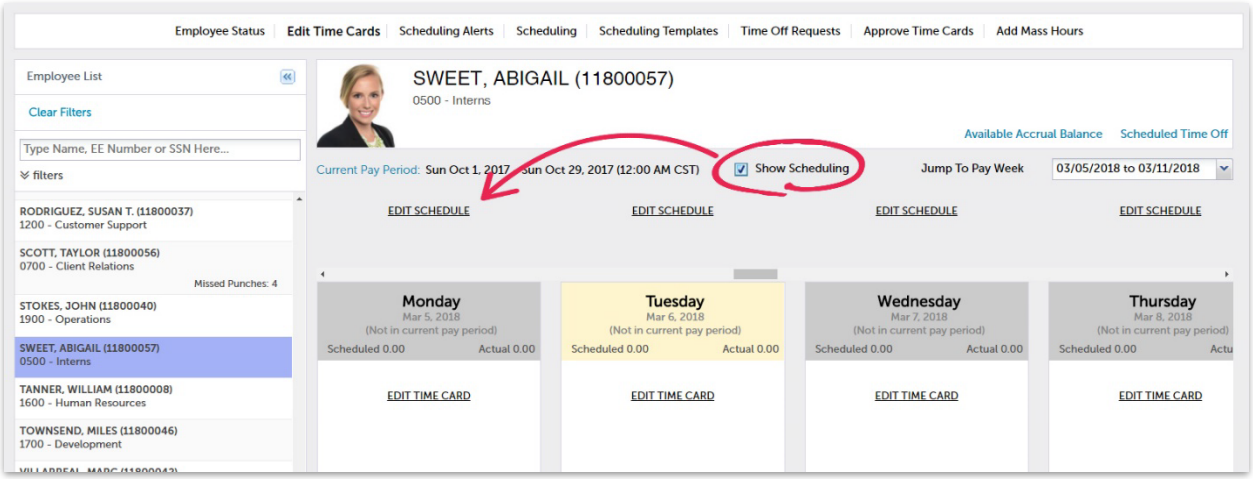
By default, only partially allocated schedules show on your *Scheduling* page. To view created schedules, check the *Include fully allocated schedules* box.



Double-click a schedule to view and make changes.

If you need to add an additional shift to a schedule that has already been created, add the schedule to the employee from their time card:

Go to **Attendance** > **Edit Time Cards** and select the desired employee from the list on the left. Check *Show Scheduling* and click **EDIT SCHEDULE**.



> **NOTE:** Added shifts will not flow back to the schedule but will show on the scheduling reports.

Existing scheduled time for employees will show on the time card if the *Show Scheduling* box is checked.

> **NOTE:** Edits made to employee schedules from the time card will only flow back to the schedule if the employee/shift was first on the schedule.

The BEST PRACTICE for editing existing schedules will be to

1. Add what is needed via the employee time cards
2. Adjust the scheduling template if the changes need to be reflected moving forward
3. Use the updated template to create future schedules

Scheduling Alerts

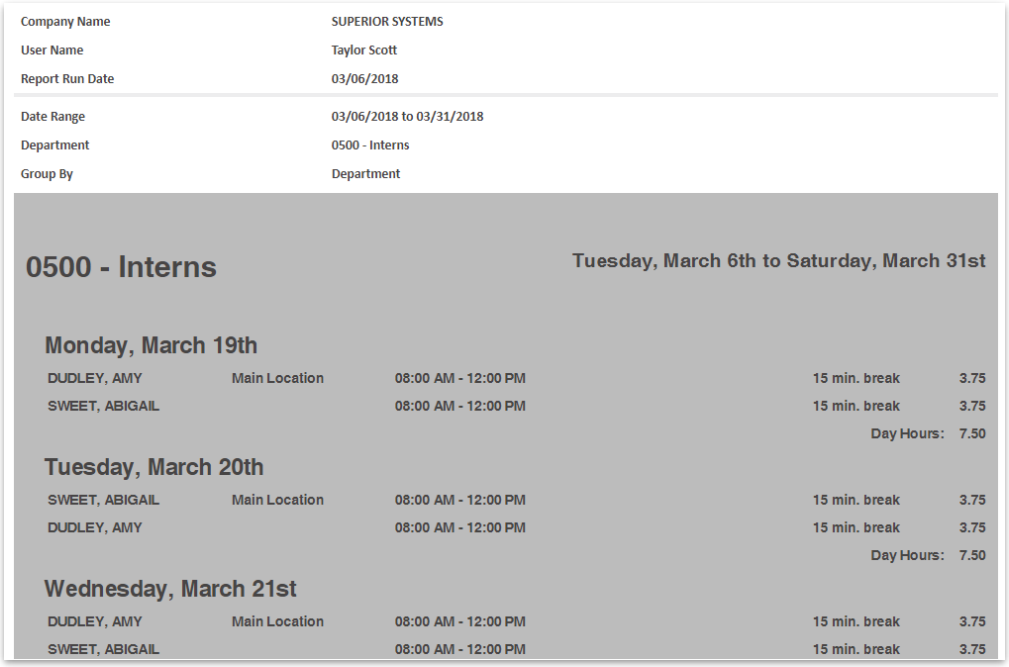
Attendance > Scheduling Alerts will show you the following alerts:

- **Absent** – Employees who are scheduled but have not clocked in.
- **Late** – Employees who have clocked in after the specified number of minutes set by your administrator
- **Conflicts** – Shows any upcoming overlapping shifts on recurring schedules.
- **Variances** – Employees whose actual shift time varies from their schedule by the number of minutes specified by your administrator.
- **Exceptions** – Employees who have clocked in to a department other than the one they are scheduled.

Scheduling Reports

Go to **Reporting > Attendance**.

The *Printable Schedules* report will show scheduled shifts for an entered date range. The information reflects what is on employee time cards.



Company Name	SUPERIOR SYSTEMS
User Name	Taylor Scott
Report Run Date	03/06/2018
Date Range	03/06/2018 to 03/31/2018
Department	0500 - Interns
Group By	Department

0500 - Interns — Tuesday, March 6th to Saturday, March 31st

Monday, March 19th

DUDLEY, AMY	Main Location	08:00 AM - 12:00 PM	15 min. break	3.75
SWEET, ABIGAIL		08:00 AM - 12:00 PM	15 min. break	3.75
			Day Hours:	7.50

Tuesday, March 20th

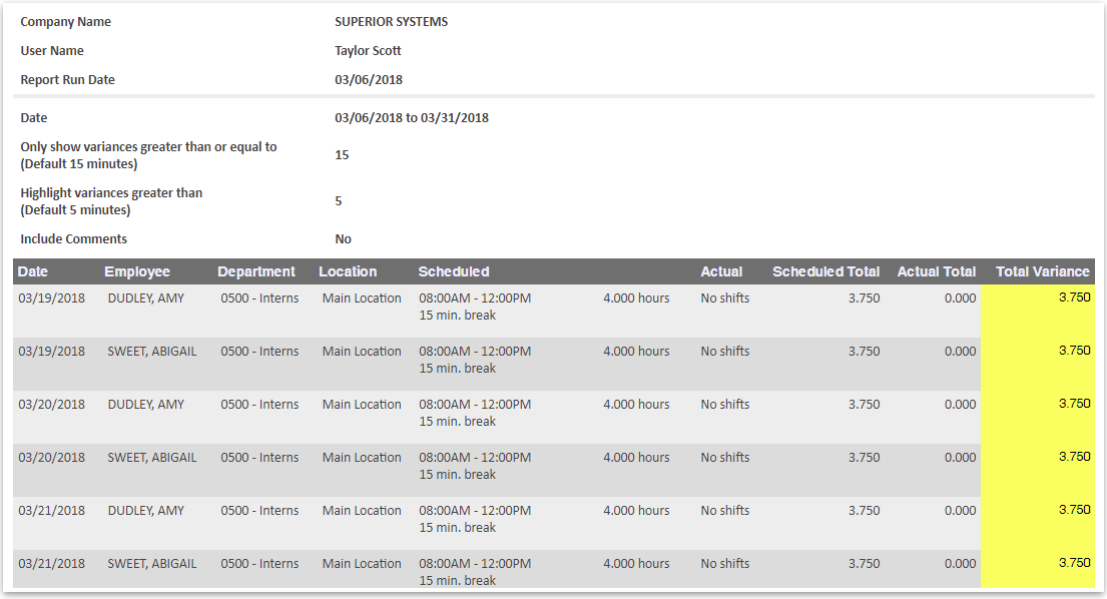
SWEET, ABIGAIL	Main Location	08:00 AM - 12:00 PM	15 min. break	3.75
DUDLEY, AMY		08:00 AM - 12:00 PM	15 min. break	3.75
			Day Hours:	7.50

Wednesday, March 21st

DUDLEY, AMY	Main Location	08:00 AM - 12:00 PM	15 min. break	3.75
SWEET, ABIGAIL		08:00 AM - 12:00 PM	15 min. break	3.75

(Report shown grouped by Department)

The *Scheduled vs. Actual* report will list employee shifts that vary from their scheduled shifts. You have the option to show only certain variances and highlight certain variances.



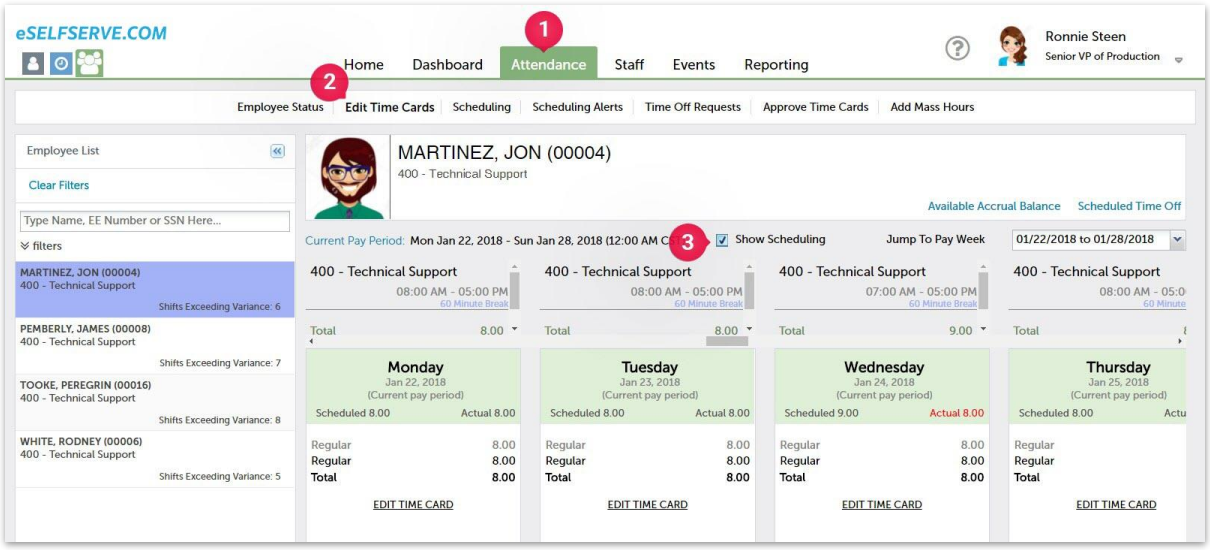
Company Name	SUPERIOR SYSTEMS
User Name	Taylor Scott
Report Run Date	03/06/2018
Date	03/06/2018 to 03/31/2018
Only show variances greater than or equal to (Default 15 minutes)	15
Highlight variances greater than (Default 5 minutes)	5
Include Comments	No

Date	Employee	Department	Location	Scheduled		Actual	Scheduled Total	Actual Total	Total Variance
03/19/2018	DUDLEY, AMY	0500 - Interns	Main Location	08:00AM - 12:00PM 15 min. break	4.000 hours	No shifts	3.750	0.000	3.750
03/19/2018	SWEET, ABIGAIL	0500 - Interns	Main Location	08:00AM - 12:00PM 15 min. break	4.000 hours	No shifts	3.750	0.000	3.750
03/20/2018	DUDLEY, AMY	0500 - Interns	Main Location	08:00AM - 12:00PM 15 min. break	4.000 hours	No shifts	3.750	0.000	3.750
03/20/2018	SWEET, ABIGAIL	0500 - Interns	Main Location	08:00AM - 12:00PM 15 min. break	4.000 hours	No shifts	3.750	0.000	3.750
03/21/2018	DUDLEY, AMY	0500 - Interns	Main Location	08:00AM - 12:00PM 15 min. break	4.000 hours	No shifts	3.750	0.000	3.750
03/21/2018	SWEET, ABIGAIL	0500 - Interns	Main Location	08:00AM - 12:00PM 15 min. break	4.000 hours	No shifts	3.750	0.000	3.750

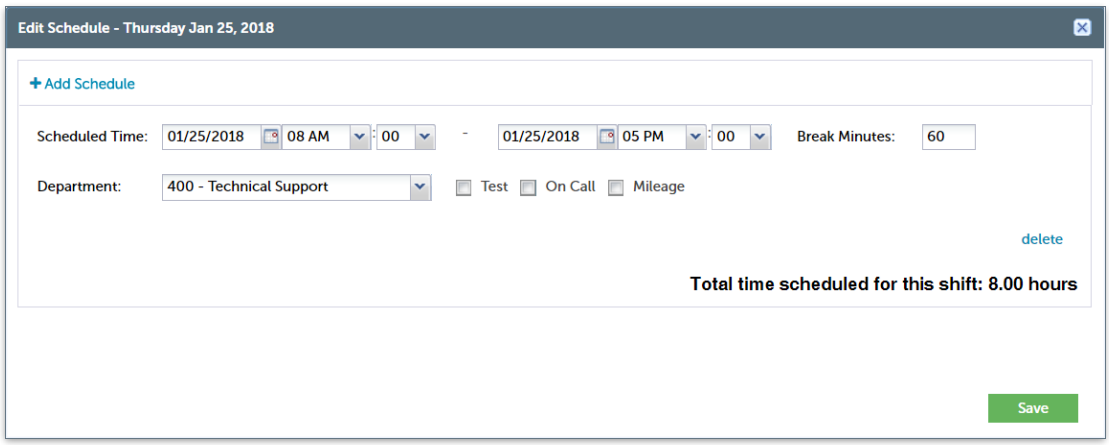
For questions about scheduling, contact your administrator.

ADDING AND EDITING SCHEDULES FOR EMPLOYEES

1. To schedule shifts for employees, go to the *Attendance* tab.
2. Click **Edit Time Cards**.
3. Check **Show Scheduling**.



To add a new schedule or edit an existing schedule, click **EDIT SCHEDULE** on the day you need to edit.



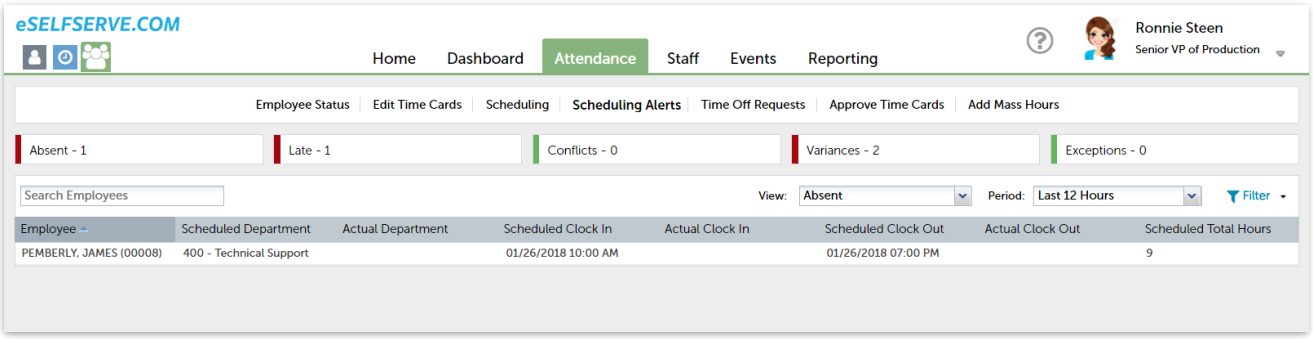
Click **Add Schedule** to add start and end times, break minutes, and assign a department. Choose **Save** when complete.

SCHEDULING ALERTS

Attendance > *Scheduling Alerts* will show different alerts:

- Absent – Employees who are scheduled but have not clocked in.

- Late – Employees who have clocked in after the start of their schedule.
- Conflicts – Shows any upcoming overlapping shifts on recurring schedules. It will show conflicts for shifts that have not yet started. Previous conflicts will appear on employee time cards.
- Variances – Employees whose actual shift time varies from their schedule.
- Exceptions – Employees who have clocked in to a department other than the one they are scheduled.



SCHEDULING REPORTS

Reporting › *Attendance* will show all attendance reports you can run. The *Printable Schedules* and *Scheduled vs. Actual* reports will pull data from the schedules on employee time cards.