Self Service Transactions
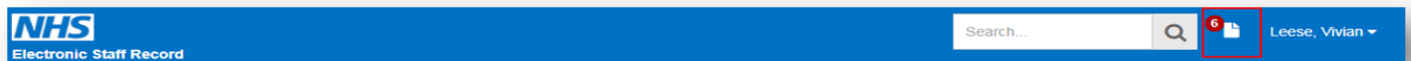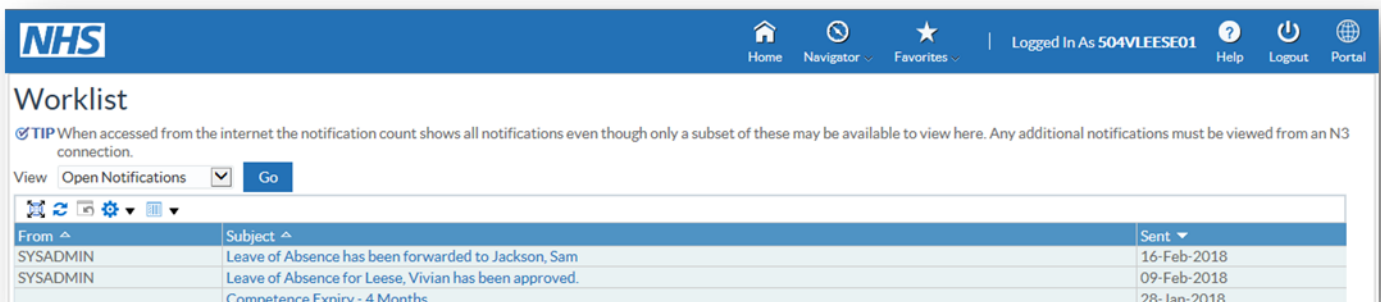
Workflow Notifications

Introduction

Notifications within ESR are system delivered messages which are sent either for action or information purposes.

Access Notifications

Notifications are accessible from the ESR Portal and in most cases can also be received and actioned via email.

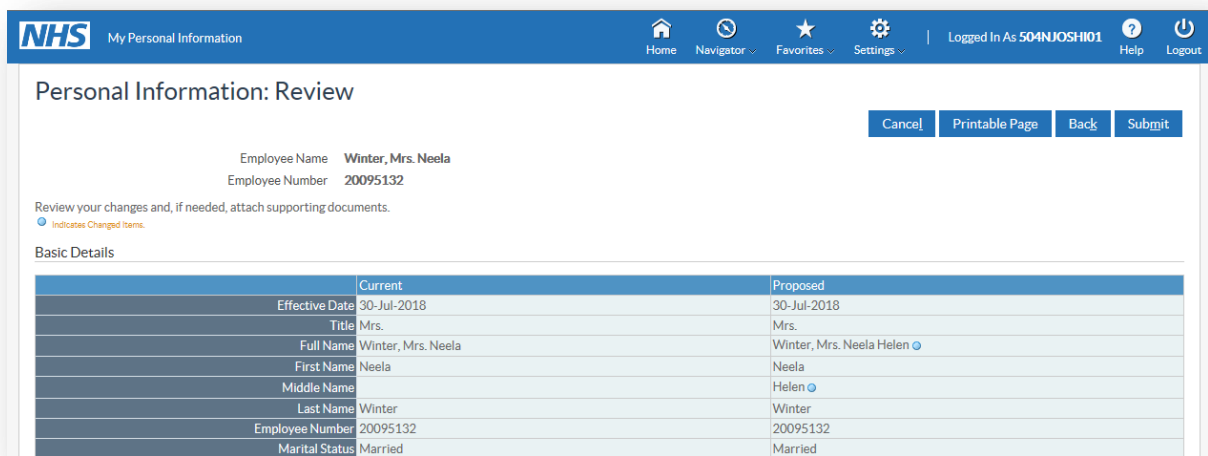## Changes Made In Employee Self Service

Certain changes made to the information in Employee Self Service are subject to approvals. For example Qualifications, Change of Name, Management of

Registrations and Memberships, Enrol on Learning (where the course is not set to Self-Enrol) and Work Email Address.

When the data items are changed the employee has the opportunity to review the changes they have made.
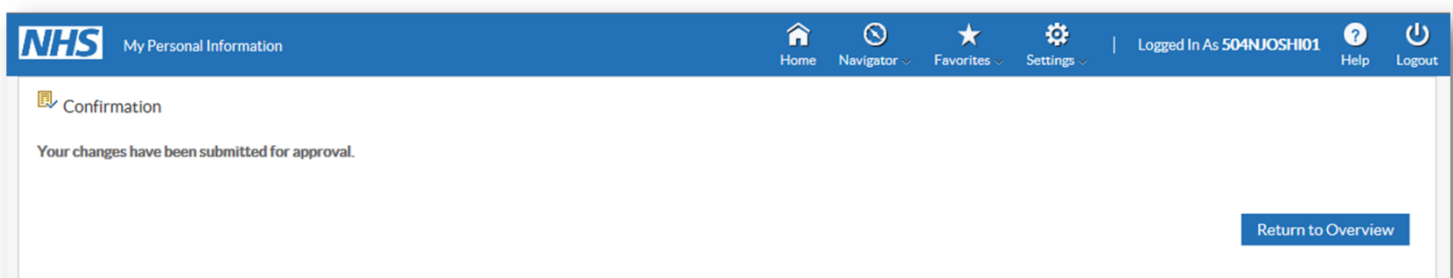

Once any of these changes/requests is submitted a message is displayed confirming that it has been submitted for Approval.

The change can be approved, rejected, reassigned or returned with a request for further information by the supervisor.

Self Service Transactions

Employee Annual Leave Requests

An employee can request leave and submit for their supervisor to approve.

The change can be approved, rejected, reassigned or returned with a request for further information by the supervisor.

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If the request is not approved within 28 days it is returned to the employee who then will need to resubmit their request.

Hours/Salary Change

Organisations have the option to send notifications to employees when there are one or more contractual changes to an assignment for the following data items:

- Position Title
- Grade
- Salary (pro rata)
- Contracted Hours

A weekly process will run which will look at the status of the above data items and compare them with the previous weeks values.

Where any of the items are different a notification will be generated to the employee. If changes have been made to more than one data item for one assignment record between the process run dates then one notification will be generated showing all the changes made to that assignment.
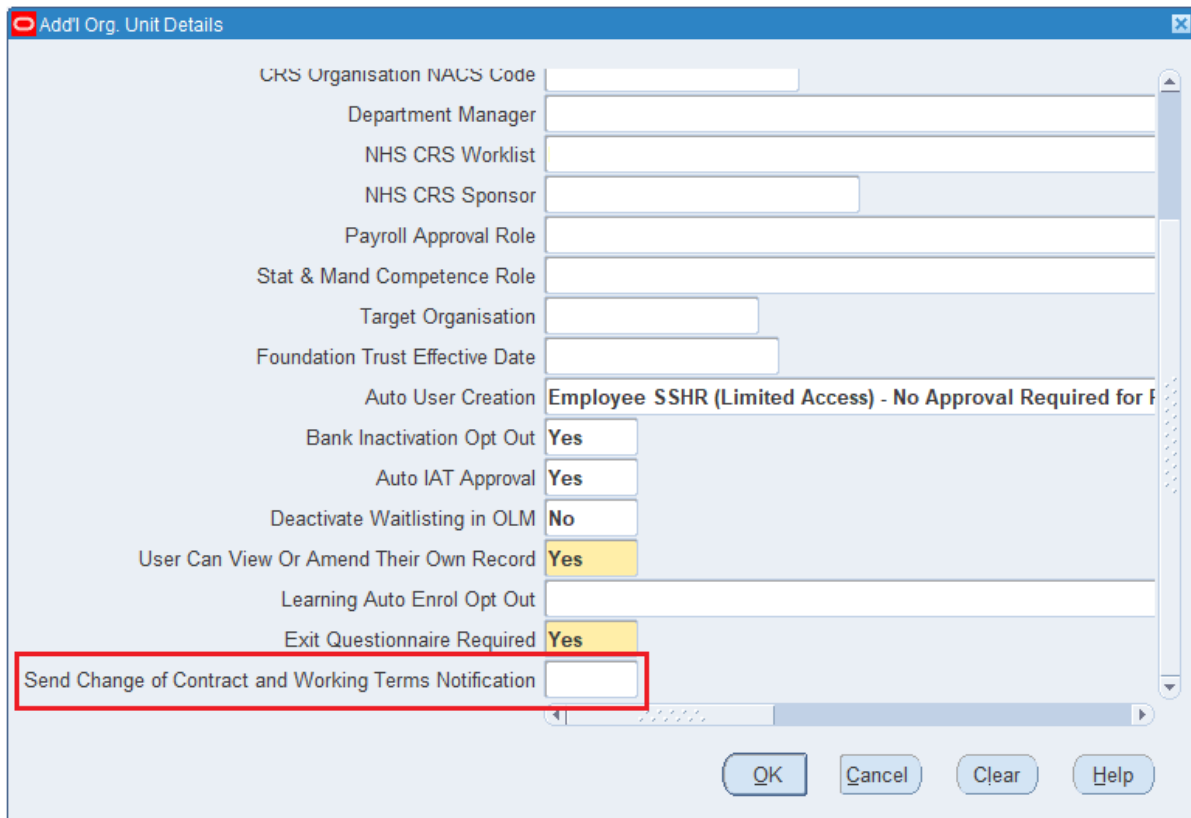
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If a data item is changed and then subsequently changed back to its original value (i.e. the change is removed) within the process run dates then no notification will be generated.

If an employee has multiple assignments and changes are made to more than one assignment a notification will be sent to the employee for each assignment record.

To invoke this functionality the 'Send Change of Contract and Working Terms Notification' field needs to be set to yes. This is done using the Workstructures URP at the Trust level settings.
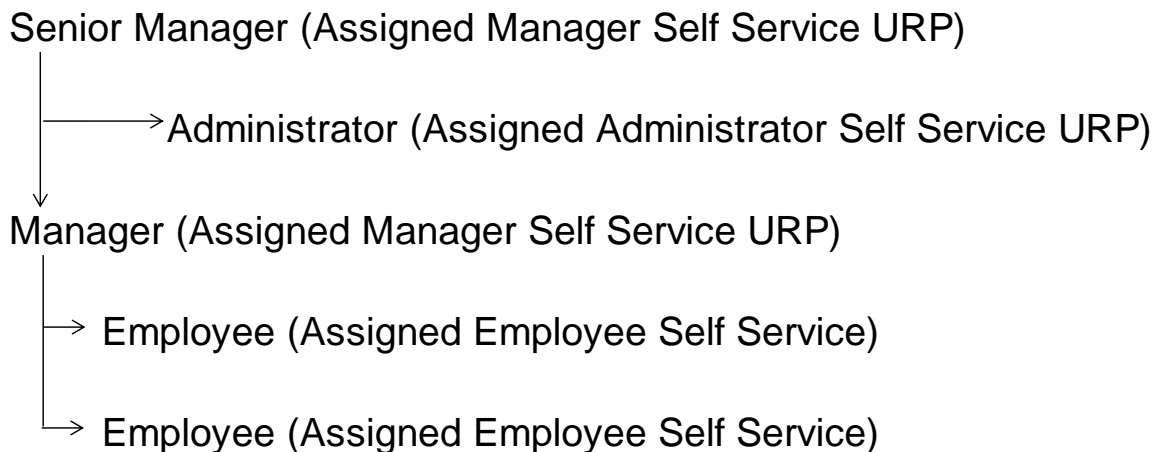

Administrator Self Service

Administrator Self Service allows administrators to perform data entry on behalf of managers. The Administrator does not have to sit directly below a manager in the hierarchy. This means that the Administrator can act on behalf of managers both above and below them in the supervisor hierarchy.

Self Service Transactions

Senior Manager (Assigned Manager Self Service URP)

Administrator (Assigned Administrator Self Service URP)

Manager (Assigned Manager Self Service URP)

Employee (Assigned Employee Self Service)

Employee (Assigned Employee Self Service)

Group A Pay (Impacting)	Group B (Non pay Impacting)
Assignment Changes	Personal Changes
Contracted Hours Changes	Property Register
End Employment	Supervisor Change
Manage Hires	Locations
	Absence
	Competencies
	Qualifications
	Registrations and Memberships
	Learning
	External learning

Group A Actions impact on pay while those in Group B do not with the exception of Absence. An Administrator granted access to Administrator Self Service will have the ability to make changes for actions in both Groups A or B.

Different options are available to determine the routing rules for Administrator notifications:

Administrator Actions Manager Approval – before the change is applied to ESR the employee's manager has to approve the change.

Administrator Actions No Approval – once the administrator makes the change it is applied directly to ESR and no information is sent to the employee's manager.

Administrator Actions FYI – once the administrator makes the change it is applied directly to ESR and a notification is sent to the employee's manager informing them of the change but there is no action required by them.

The Manager check box needs to be ticked on the Miscellaneous tab on the approving managers assignment to correctly identify approvers.

The senior manager details need to be entered into the Supervisor tab of the assignment.

Click on others on the HR Personal Information form and then select Extra Information from the values.

You will then be able to select the Group A and/or Group B list and the approval level required.
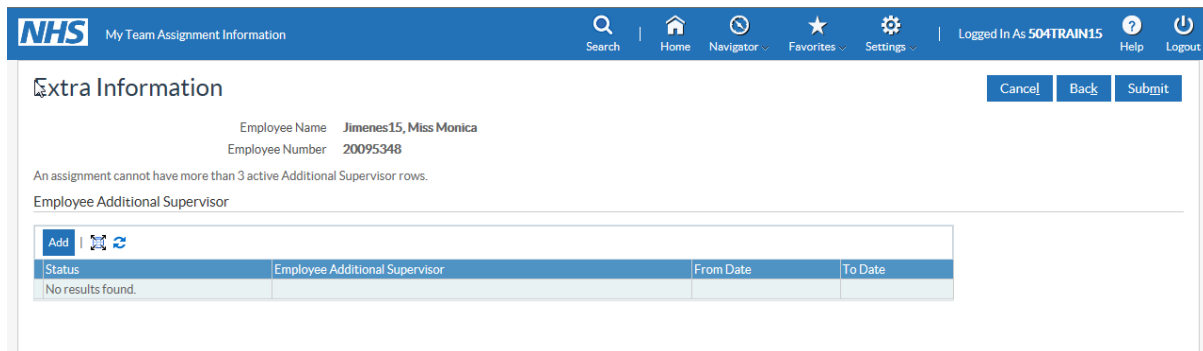
Self Service Transactions

Managing Workflow

Multiple Supervisors

Multiple Supervisors can be set up against an employee record to take account of job sharing.

Adding multiple supervisors for an employee means that more than one supervisor has the ability to make changes to their record and approve notifications.

Where requests are sent to multiple supervisors the first action taken against a notification will close it for all supervisors.

Where notifications are returned for correction the notification will close for all users.

A maximum of three additional supervisors can be added.

Proxy Access

Proxy Access is available to all the Self Service URPs with the exception of Employee Self Service.

The proxy functionality allows delegated access to URPs and notifications, so that tasks can be performed by one person on behalf of another. Users can grant proxy access to the self service responsibilities listed below and specify a list of other users who can access their worklist and action notifications on their behalf via Settings.

Vacation Rules

Rules can be created which will allow other users to manage notifications on your behalf between certain dates. You can do this by selecting the Vacation Rules option from your Worklist.
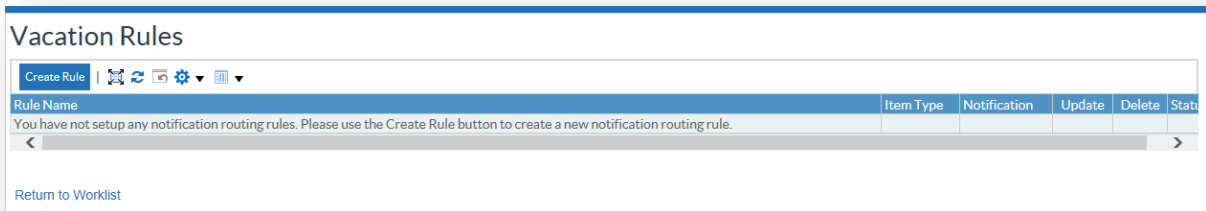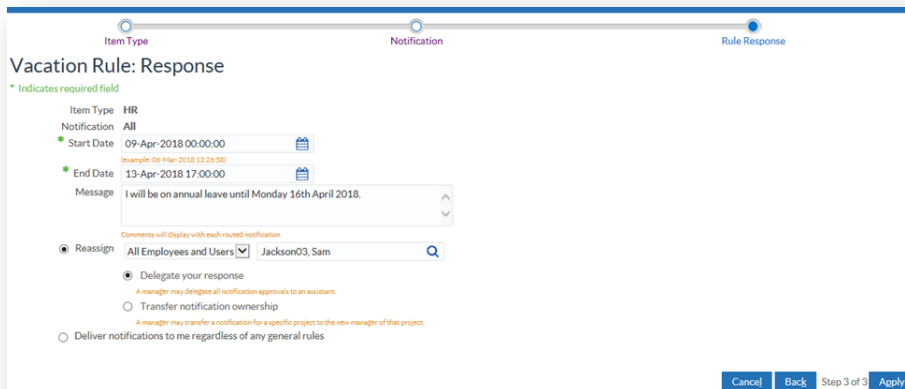
Any previously created rules are displayed and new or additional rules can be created by selecting the 'Create Rule' button.

Choose whether to Reassign the notification (with delegate authority or by actually transferring the ownership of it), or by responding to the Requestor with the contents of the note attached. Once the name has been selected, the Rule Response is completed as demonstrated.

Vacation Rules can be set up for all Self Service URPs.

Role Based Notifications

Role Based Notifications provide relevant business information to specific ESR users who are required to be aware of or act on this information as part of their role.

The example shown is a notification sent to the Termination Notification Role Holder informing them of the termination date of employees.

Below are some examples of Role Based Notifications sent to the designated Role Holder following a change initiated in Self Service:

New Starter Notification

Property Register

Termination Notification

Supervisor Hierarchy NtfLocal Roles

It is also possible to create local roles. A role can be assigned to organisations. Assigning a role to an organisation will assign it to all organisations beneath it in the organisation hierarchy, unless they are overwritten at a lower level.

Below are some examples of Local Roles:

Stat & Mand Competencies Ntf

SSHR Payroll Approvals

Where an organisation has no local role assigned to it, either directly or at any point above it in the hierarchy, then the national role will continue to be used.

Time Out Rules

The majority of Notifications are subject to time out rules. If the Notification is not actioned within the specified time out period it is either progressed to the next supervisor in the hierarchy or returned to the initiator. If the Notification is still not actioned it will continue to progress up the hierarchy until action is taken. Notifications cannot be "switched off" for certain groups of staff.

Employee Initiated Changes	Time Out Days
Absence	28
Personal Information	8
Education and Qualifications	8
Enrol In Training	8
Competence Profile	3
Professional Registration	3
Internet Access Approval	10

*Note - After 28 days, requests for Annual Leave will be returned to the initiator so that they can cancel the workflow.

Administrator Function	Time Out Days
Administer Assignment Changes	5
Administer Hours Changes	5
Administer End Employment	5
Administer End Non Primary Assignment	8
Administer Hires	5
Administer Personal Information	8
Administer Property Register	8
Administer Supervisor	5
Administer Location	5
Administer Absence	5

Administer Competencies	5
Administer Qualifications	8
Administer Registrations and Memberships	5