
Employee and Manager Self-Service Training Agenda 2 Hour Online Course

Self-Service Setup Wizard – Setup Manager

- Setup the login page address and SMTP server
 - Test the login page
- Defining a security policy for self-service
 - Strategy for generation of user IDs/passwords
 - Policy for handling forgotten passwords/failed logins
- How to setup/enable the self-service applications
 - Walk through the setup: Home, My Self, My Family, My Company and Custom Tabs
 - Walk through the setup: My Paycheck
 - Discuss requirements for My Paycheck detail
 - Walk through the My Time Off configuration screens
 - Define the process for requesting/approving time off
- Security requirements for My Team tab
 - Set up approvers/supervisors through security & licensing
- Setup approval policies
 - Define appropriate approval policies: Automatic or Manual
 - Routing of leave requests
 - Designating an HR contact
 - Leave request notifications
- Open enrollment setup
 - Creating an open enrollment period
 - How to enable/disable employee changes
 - Walk through My Benefits configuration screens
 - Enabling sections
 - Enabling the benefit plans
 - Configuring the comparison screens for benefit plans
 - How to customize instructions and messages

Manager Self-Service

- Define the approval workflow - Walk through the three basic components of the MSS workflow
 - Build approver roles
 - Assigned to Employees
 - Build approver chains
 - Who is approving
 - Build the business process
 - The type of change

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How to hide or give alternate names to fields

Working with employees

- Using the employee finder
- What defines direct reports

The employee card

- Adding information to an employee record
 - Personal
 - Employment
 - Compensation
 - Analytics and salary modeling tools
 - Job information
 - Leave summary
 - Slide out leave calendar

Working with tasks

- What is a task?
- How to approve/skip/override the approval chain on a task
- What happens when a task is approved or rejected?
- Adding comments to the task and for the next approver

Self-Service Administration – Employee Manager

Accounts tab

- Enable/disable user accounts
 - Generate/re-set user passwords
 - Sending account information using correspondence wizard
- New hire enrollment wizard vs. open enrollment wizard
- Monitoring the open enrollment/new hire statuses
- Approving/rejecting pending changes
- Reviewing the self-service logs