

This guide provides information on how to set up and apply employee Self Service Profiles.

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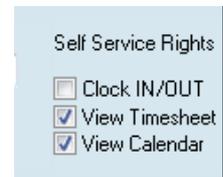
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# 1. Introduction

Self Service Profiles are sets of rules that dictate what an employee can see and do in the Employee Self Service module. They can be set up and then assigned to individual employees or Groups of employees.

# 2. Setting Self Service Rights

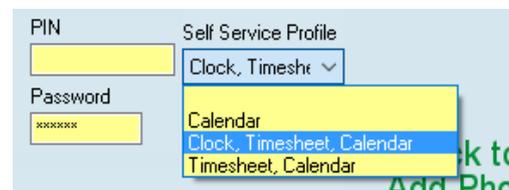
Historically, employees requiring Employee Self Service rights had check boxes on their Employee screen in the Chronologic system:



This has now changed to a drop down selector.

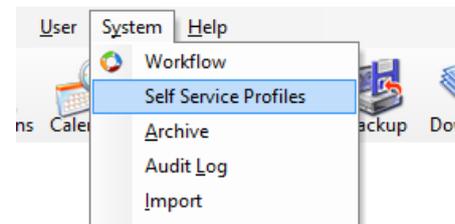
When you upgrade to 3.380 or later, the system creates whatever Self Service Profiles you need to maintain consistency, and assigns them to the employees. For example, if an employee had only 'View Timesheet' ticked in the old system, then they will be assigned to the Self Service Profile 'Timesheet' when you upgrade, and this will mean they retain access to the Timesheet. Similarly, if an employee had 'View Timesheet' and 'View Calendar' ticked previously, they would be assigned to the 'Timesheet, Calendar' Self Service Profile.

Please bear in mind that each 'starting' Self Service Profile could be linked to hundreds of employees. We recommend leaving the starting Self Service Profiles as they are and creating new Profiles for your employees if you require new and different profiles to be set up.



# 3. Accessing Self Service Profiles

Employee Profiles are accessed in System/Self Service Profiles:



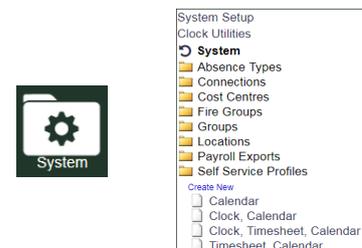
And on Save, they are available in the T&A Rules in Core or the System folder in Net. You may need to Refresh the list to see the new Profiles.

Right click in the white space and choose Refresh to do that in Core, click the refresh icon in Net. ↻

Core:



Net:



## 4. Setting Self Service Profiles

The Profile can then be set on the Employee screen here.

Core:

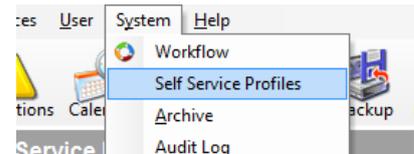


Net:



## 5. Configuring Employee Profiles

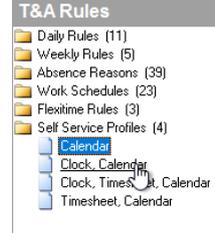
Access the configuration window from the System drop down menu:



To create a new Profile, click on the New icon here:



To edit an existing Profile, click on it in the tree view on the left:



### The General Tab

Core and Net screen shots provided for information.

#### Access Rules

##### View Timesheet

Gives the employee the ability to view their timesheet.

##### View Calendar

Gives the employee the ability to view their calendar.

##### View Availability

Gives the employee the ability to view their Availability Screen.

#### Timesheet

##### Edit Timesheet

The Employee can make edits to their timesheet. These edits will appear in the Audit Log.

##### Multi-Week Timesheet View

The Employee can view multiple timesheets at once. This setting works in conjunction with the Focus system wide setting found in system setup.

#### Clocking Rules

##### Clocking

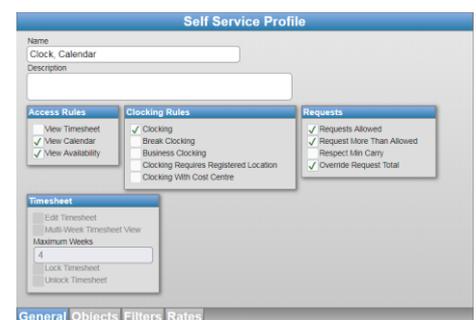
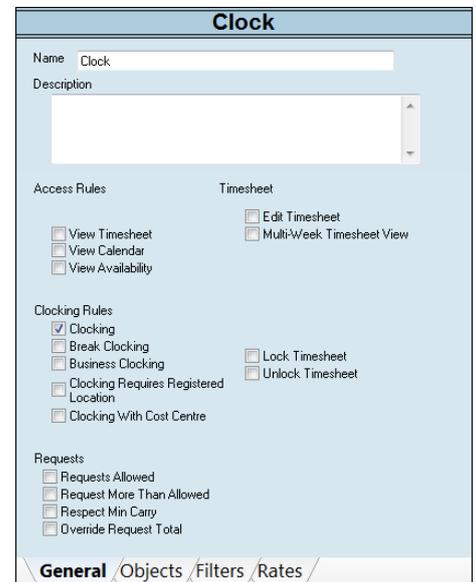
This allows the employee to clock in and out using the Self Service App.

##### Break Clocking

This allows the employee to perform a 'Break' clocking.

##### Business Clocking

This allows the employee to perform a 'Business In' and 'Business Out' clocking.



### Clocking Requires Registered Location

The means clocking will not be allowed unless the employee is at a registered location, that is, they are connected to the internet via a registered IP Address.

To find the address, open a Browser and type “what is my ip” or Command Prompt and PING a URL, or un-tick this option and clock to get the IP.

### Clocking With Cost Centre

This allows an employee to clock to a particular cost centre.

### Lock Timesheet

This allows the employee to lock their own timesheet.

### Unlock Timesheet

This allows the employee to unlock their timesheet. Note that they will be able to unlock the timesheet regardless of who locked it originally.

### Requests

#### Requests Allowed

This allows the employee to make absence requests.

#### Request More Than Allowed

This allows the employee to request an absence even if they do not have enough holiday days to cover the length of time requested.

#### Respect Min Carry

Respect Min Carry means the system will take into account any figure in the employee's Min Carry value for the relevant absence period.

#### Override Request Total

This allows the employee to define their own exact amount of hours on a request, rather than relying on the pre setup choices. So for example, with this ticked they could select an Absence Reason that is set to a full day, but only assign an hour to it. This is used when there is a 'typical' amount of time for an Absence, eg a full day for company training, but then there are exceptions.

### The Objects Tab

#### Absence Reasons

This affects which Absence Reasons are selectable by and visible to the employee. This will affect making absence requests in the Calendar and the Availability screen, and also edits to the employee's timesheet - if he or she has that right enabled on the General tab.

#### Cost Centres

This controls which Cost Centres the employee can clock to, if “Clocking With Cost Centre” is enabled in the General tab, it also affects the clockings the employee can make on the timesheet, if the employee has timesheet edit rights.

#### Leave Channels

This decides which Leave Channels are visible to the employee in their Calendar.

The image shows two screenshots of a web application interface. The top screenshot is titled 'Clock' and has a 'Name' field with 'Clock' entered and a 'Description' field. Below these are three panels: 'Absence Reasons' with a list of reasons including 'ZH NOT AVAILA...', '.Authorised', and 'CONFERENCE'; 'Cost Centres' with a list including 'Admin', 'Calendar', and 'Transport'; and 'Leave Channels' with 'Personal' and 'Public' options. The bottom screenshot is titled 'Self Service Profile' and shows similar panels for 'Absence Reasons' (with 'AWOL' and 'Customer Site Visit' checked), 'Cost Centres' (with 'CLL Accounts' and 'CLL Cleaning' checked), and 'Leave Channels' (with 'Lieu', 'Personal', and 'Public' checked). Both screenshots have a navigation bar with 'General', 'Objects', 'Filters', and 'Rates' tabs.

## The Filters Tab

The Filters Tab deals with the views of both the Calendar and the Availability Screens.

### Default

This determines the starting state of the screens when the employee logs in.

### Include Schedule

Affects the Availability Screen.

### Only Select Scheduled Days

Affects both the Calendar and the Availability screen.

### Schedule Detail

Affects both the Calendar and the Availability screen.

### Show Absent/Available

Choose the starting view in the Availability Screen, either showing Absent or showing Available.

### View/Edit

This determines whether the employee can view the setting and make changes to it.

### Include Schedule

Affects the Availability Screen.

### Only Select Scheduled Days

Affects both the Calendar and the Availability screen.

### Schedule Detail

Affects both the Calendar and the Availability screen.

### Show Absent/Available

Choose the starting view in the Availability Screen, either showing Absent or showing Available.

## The Rates Tab

### Rates View

This determines which Rates the employee is able to view, everywhere they can view Rates.

### Rates Edit

This determines the employee's Edit rights to the Rates.

The screenshot shows the 'Clock' configuration screen with the 'Filters' tab selected. It includes fields for 'Name' (Clock) and 'Description'. Below are two columns of checkboxes for 'Default' and 'View/Edit' settings: 'Include Schedule', 'Only Select Scheduled Days', 'Schedule Detail', and 'Show Absent/Available'. A dropdown menu for 'Show Absent/Available' is set to 'Show Absent'. The bottom navigation bar shows 'General', 'Objects', 'Filters', and 'Rates'.

The screenshot shows the 'Self Service Profile' configuration screen with the 'Filters' tab selected. It includes fields for 'Name' (Clock) and 'Description' (Calendar). Below are two columns of checkboxes for 'Default' and 'View/Edit' settings, all of which are checked: 'Include Schedule', 'Only Select Scheduled Days', 'Schedule Detail', and 'Show Absent/Available'. A dropdown menu for 'Show Absent/Available' is set to 'Show Available'. The bottom navigation bar shows 'General', 'Objects', 'Filters', and 'Rates'.

The screenshot shows the 'Clock' configuration screen with the 'Rates' tab selected. It includes fields for 'Name' (Clock) and 'Description'. Below are two columns of checkboxes for 'Rates View' and 'Rates Edit' settings, both with an 'All' checkbox and a list of rate types: 1: Basic, 2: Basic2, 3: OT1, 4: Hol, 5: B/Hol, 6: CSP, 7: Unpaid, 8: Compas, 9: CP0th, 10: Enhanc, 11: L\_Hol. The bottom navigation bar shows 'General', 'Objects', 'Filters', and 'Rates'.

The screenshot shows the 'Self Service Profile' configuration screen with the 'Rates' tab selected. It includes fields for 'Name' (Clock) and 'Description' (Calendar). Below are two columns of checkboxes for 'View' and 'Edit' settings, both with an 'All' checkbox and a list of rate types: Basic, OT150, OT200, Hols, Sick, UAOT. The bottom navigation bar shows 'General', 'Objects', 'Filters', and 'Rates'.

## 6. Saving a Profile

Once you have finished carrying out any changes click on the Save icon. You can then assign the new Profile to the employees it applies to in their employee screen as shown in section

