



Employee self-service (ESS)

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SmoothPay's Employee Self-Service Portal

About ESS

SmoothPay's employee self-service (ESS) application is served via your browser on a mobile device or computer.

Introduced in May 2019, the employee self-service (ESS) portal provides a convenient way for staff to:

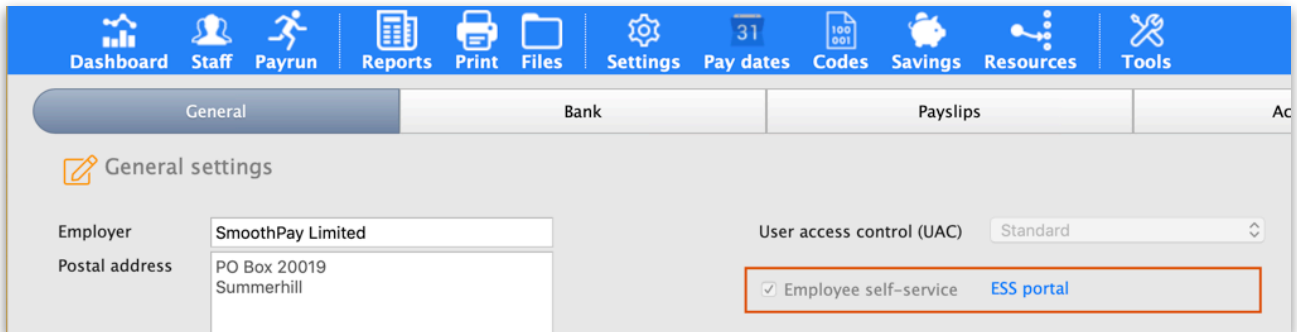
- see leave balances and make leave requests
- see pay summaries
- capture timesheet data (*using a variety of options such as daysheet, transaction or stopwatch*)

Security is all-important, and care is taken to correctly authenticate a user before permitting access to the portal.

Privacy is also critical and your name, employer name, tax number etc. are not displayed within the app.

Configuration

Turning ESS on requires simply ticking the option in Settings (*ESS is not available for demo or trial systems*).

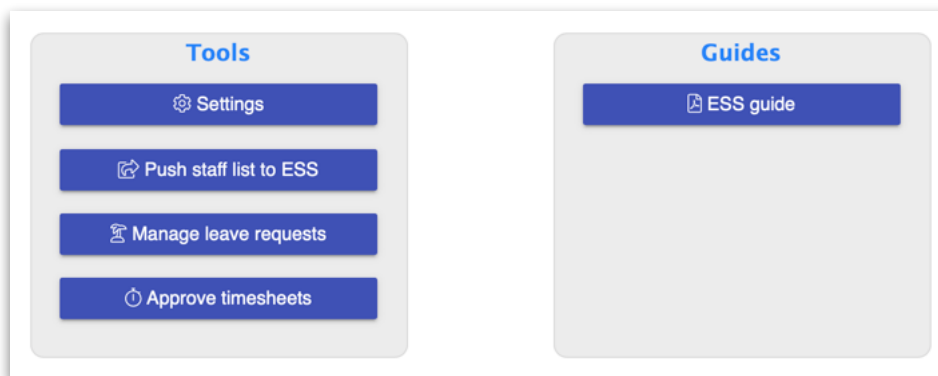


Tick the ESS option in Settings

Note: It is necessary to **Push staff list to ESS** on initial setup (*updated data is then published automatically as each payrun is completed*) - see below

Now that you have ESS turned on, you have the following facilities available:

- **Tools..ESS manager (or Reports..ESS..Manage):** provides for
 - Settings: require supervisor, default timesheet preference, etc.
 - Pushing employee list out to the service
 - Approval of leave requests and timesheets if required (*in development - at present all entries created in ESS are imported then approved/corrected/rejected once in the payrun*)

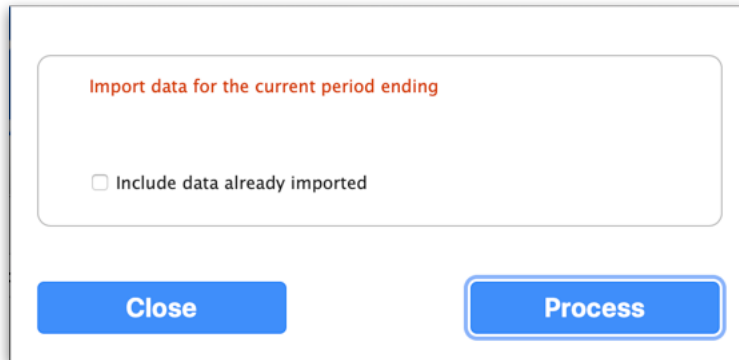


ESS Manager

Note: **Settings**, **Manage leave requests** and **Approve timesheets** do not currently provide any functionality - planned for future development.

It is only necessary to **Push staff list to ESS** on initial setup (*updated data is then published automatically as each payrun is completed*)

- **Payrun..Import..ESS:** lets you import approved timesheet and leave requests into the current payrun. These can then be edited as usual (*if needed*).



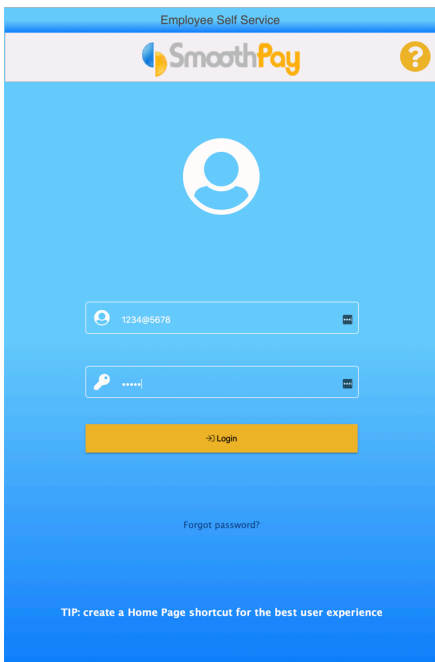
Import data for the current period ending

Include data already imported

Close Process

Payrun..Import..ESS

Accessing the ESS portal



The screenshot shows the login interface for the SmoothPay Employee Self Service portal. At the top, it says "Employee Self Service" and "SmoothPay" with a logo. Below that is a large blue circle with a white person icon. There are two input fields: the first contains the username "1234@5678" and the second contains a masked password ".....". Below the password field is an orange "Login" button. At the bottom, there is a link for "Forgot password?" and a tip: "TIP: create a Home Page shortcut for the best user experience".

Staff access the ESS service at <https://gopayroll.net/ess> then click Login to proceed to the service where they must enter their username (*and password if set*).

Each employee has a unique username similar to **1234@5678** (*which is simply their employee ID and company serial separated by an "@" character*).

The employee's username is displayed on their employee record and on their payslip.

The username cannot be changed.

Authentication

These authentication requirements are purposely designed to help prevent unauthorised access.

ESS: Authenticate using...

SmoothPay

tax number # Go!

✉ email address Go!

SMS (e.g. 64 21 1234567) Go!

You must activate your ESS account by using one of the methods above

If the employee has not logged on before or forgets their passcode they will need to provide authentication:

- **Tax number** (must match recorded tax number - activation link will be emailed to recorded address), or
- **Email** (must match recorded email address - activation link will be emailed), or
- **SMS** (must be entered as country code and number combined, e.g. 6421666123, and must contain last 5 digits of recorded mobile number - passcode will be sent instantly and activation advisory will be emailed if an email address is on record)

If authentication requirements cannot be met, then the employee cannot use the service until their details have been updated in payroll (*minimum requirement is an email address or mobile number*).

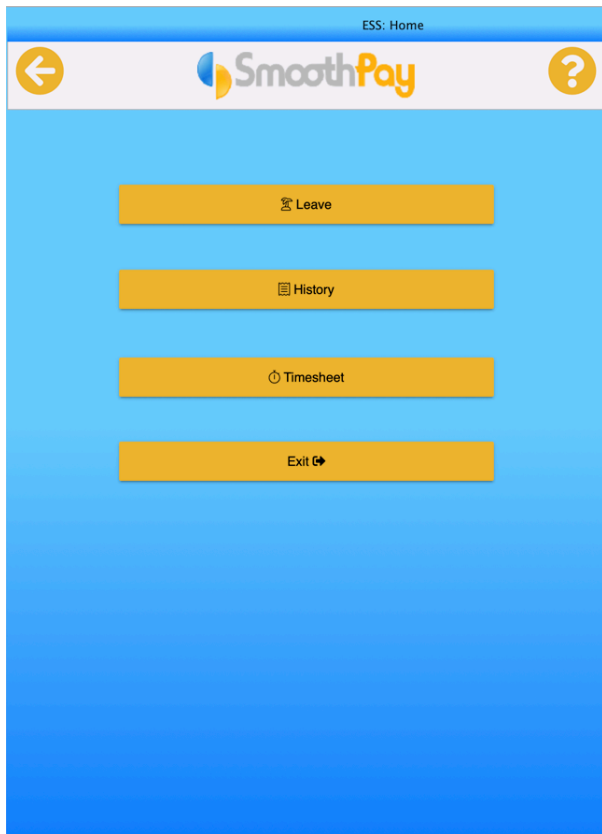
Emailed activation links are valid for a single use and expire after 30 minutes. They also contain links to instantly **deactivate** or **reactivate** your ESS account.

All authentication interactions are logged.

ESS menu structure

The ESS app is designed to work with touch devices (big buttons, rows etc.) and like most apps comprises a series of pages giving access to portal information and functions.

The following diagram illustrates how it all hangs together:



Leave

- Leave balances
- Leave requests

History

- Pay period list
- Pay summary

Timesheet

- Pay period list
- Pay transactions list
- Timesheet edit

Click item (button, or list entry) to move forward

Click the (<-) tool to move back

Feedback

Feedback is welcome.

Please email any feedback to helpdesk@smoothpaygold.com with [ESS feedback] as the subject.

* end*