

Employee Self-Service (ESS) Training Guide

This guide details all functionality available within the University's Self Service system.

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Introduction

Employee Self Service is available to all Employees and Workers at the University of Leeds. Individuals will be able to view and update certain aspects of their personal/work-related data, view, save and print their current and previous payslips, check bank details, check remaining annual leave and submit leave requests to their line managers, and review their OD&PL/Faculty training record.

The aim of this guide

To detail and provide guidance on all functionality available within the University's Self Service Portal.

Assumed Knowledge

A basic understanding of Windows operating system and Internet Explorer browser.

Useful Terminology

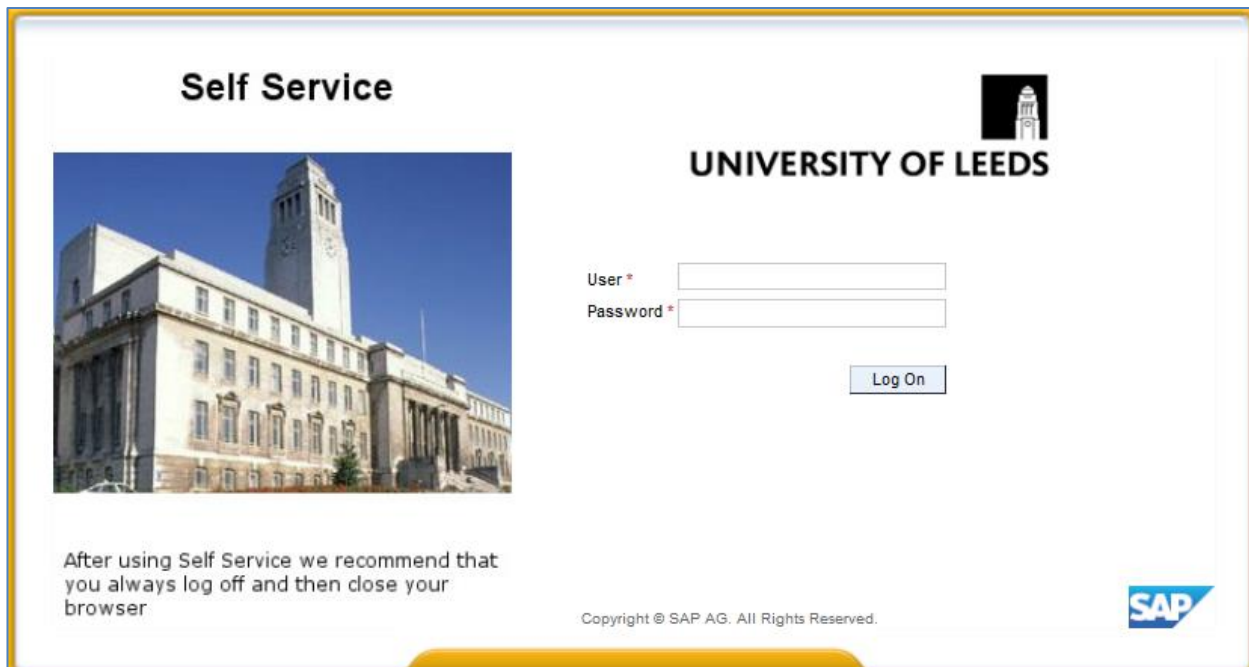
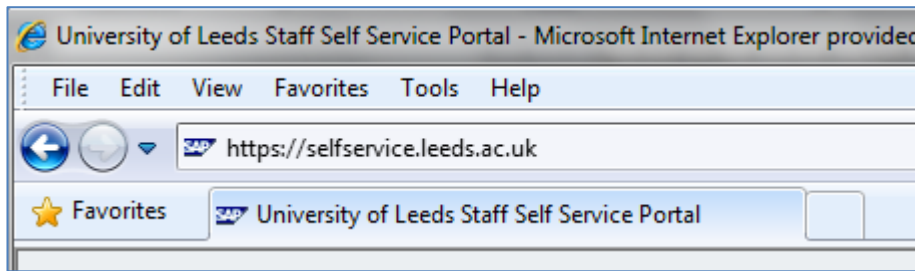
Org (Organisational) unit	Functional unit that defines the Organisational structure area e.g. Faculty, School or Department.
Position	Individual work descriptions – distinct & specific e.g. SAP trainer or HR Manager – Faculty of Arts
Paid Leave	Annual Leave and other types of leave offered by the University.
Maundy Thursday	This is the day before Good Friday. If someone wants to take annual leave on this day i.e. the afternoon, then they need to select the appropriate Leave Type from the list of options e.g. Bank Holiday Hours or Maundy Thursday – Half Day.
Delimit	Limits the validity period of an object or an Infotype. e.g. the system may change an end date of an object or Infotype so that it is no longer valid in the current period but it is not deleted. This can also happen when a new Infotype record is created. The previous record's end date is changed to one day before the new record's start date.
Collision / Time Overlap / Conflict	When booking annual leave, if an absence (e.g. sick leave, maternity leave, jury service) has already been recorded for that period then an error message will be displayed within ESS informing the user that there is a collision. Usually the system will show which leave type and date range it is colliding with.
HESA	HESA is the Higher Education Statistics Agency. HESA collects data for its own analysis as well as government education departments and funding bodies. The University is required to provide detailed information about anyone who is subject to class 1 National Insurance.
FTE	Full Time Equivalent.
Chief	SAP terminology for a manager of an org unit.

Logging in

The Self Service Portal system uses the same University network username and password that you would use to log into your PC at work. There are no additional usernames and passwords required.

To access the system enter the following URL into the address bar in your browser:


<https://selfservice.leeds.ac.uk>




Enter your standard University username and password and click Log on.

Important Security Advice

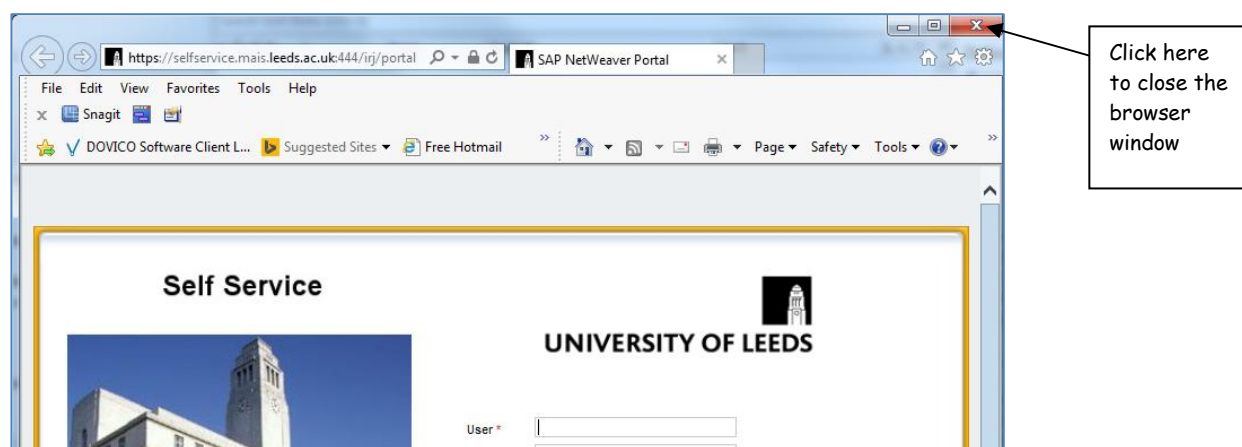
Logging Out:

It is important to log out using the Log off button near the top right corner of the window . You will then be prompted 'Are you sure you want to log off'. Click 'Yes' to confirm.

Once you have logged off, close down the browser window completely by clicking  in the top right corner. This is to ensure that all your personal details are protected.

Browser password storage:

Your browser may offer to remember your password for the Self Service website when you log in for the first time, it is **strongly recommended** that you do **NOT** accept this.





General Navigation

	Icon	Description
Overview		Returns you to the Home screen.
Log off		Exit the system (For security purposes, close the browser once you have logged off).
New		Create a new record/entry.
Edit		Amend or change an existing record.
Delete		Deletes the record
Save and Back		Save changes and return to previous screen.
Cancel		Return to previous screen without saving any changes.
Section Tabs		Navigating around screens containing information in tabs. Click on the tab name to display the contents of the screen.
Words underlined in blue (links)		Click on the link and it will take you to the appropriate screen.
Expand Data		Click the button to display (expand) the data below.
Collapse Data		Click the button to hide (collapse) the data.
Refresh		Updates the system so any changes can be reflected in the current view.

Further information

View-only screens allow the users to only view the data. Some screens allow you to create new records.

These screens will have an 'Add' button . If there is an edit icon  then amendments can be made to the existing data displayed.


If you notice any view-only data that is incorrect then please contact your local HR Hub and inform them of the required changes.

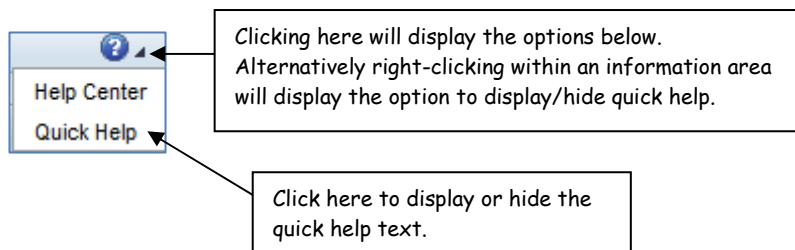
Most Frequently Used section

This area will populate and automatically update as you use the system. The links listed here can be clicked to go directly to the relevant section.

Quick Help Text

Quick help text provides useful additional information which is displayed on the majority of the ESS screens. It provides contextual guidance to the user within the displayed screen.

The Quick Help Text can be switched on or off either by clicking the Help icon  and selecting "Quick Help" or by right-clicking on a specific information area and selecting Display/Hide Quick Help.



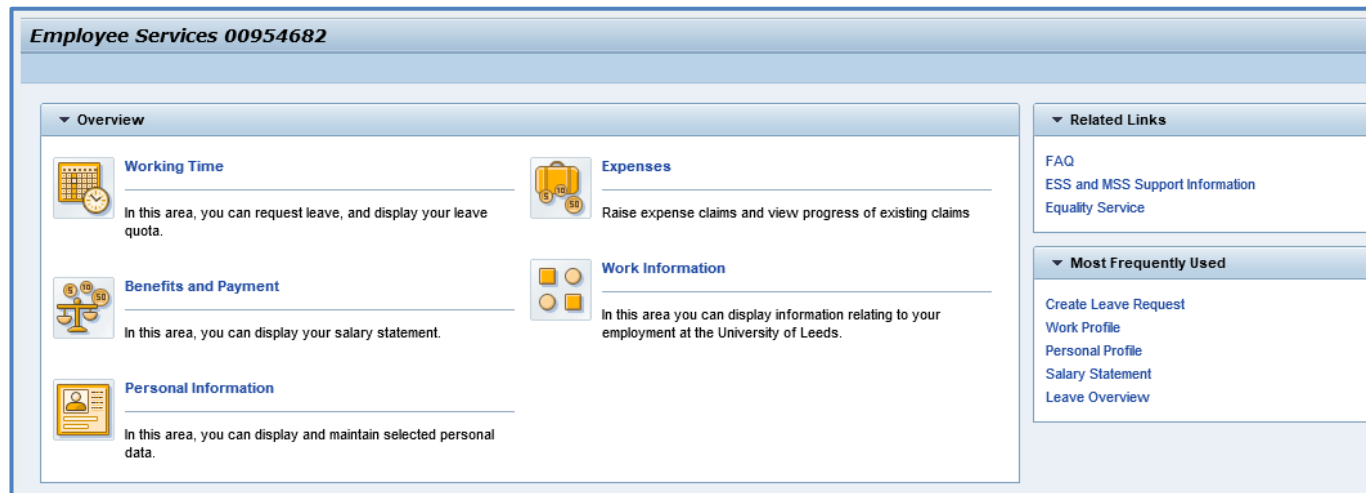
Below is an example of the quick help text displayed in the Pay Details section of the Work Profile:

This shows your current FTE and increment date. For any additional payments and deductions such as salary sacrifice or childcare vouchers please refer directly to your Payslip within the Benefits and Payments section of Self Services.

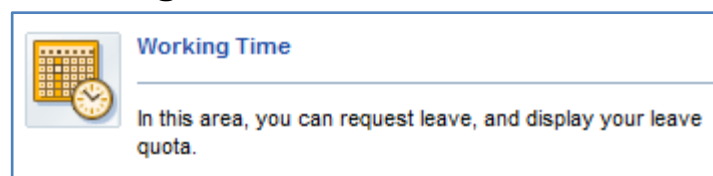
A Next Increment Date of 31.12.9999 indicates that you are at the top of your current pay grade.

Note: not all screens contain quick help text.

Overview Screen



Working Time



Annual Leave

Providing annual leave quotas have been created within SAP, individuals will be able to request Annual Leave through Self Service. The request can be sent to the relevant line manager (as defined in the SAP HR organisational structure) who can then approve or reject it through Manager Self Service.

In general it is only possible to request leave dates for the current leave year, however local annual leave administrators are able to create leave quotas for the following leave year if required, which will then enable individuals to submit leave requests for that leave year.

Outstanding leave balances can be monitored and any other absences that have been recorded against an individual's SAP HR record can be reported on here e.g. sickness, family responsibilities, jury service etc.

Full-time employees will generally receive their holiday entitlements in days. Part-time employees normally receive their holiday entitlements in hours. This is because many part-time staff work different hours throughout the week so it ensures that their holidays are deducted correctly. Additionally, full-time staff who may have an irregular shift pattern due to the nature of their work (Security staff for example) should have their annual leave in hours.

Part-time staff receive a pro-rated bank holiday allowance also calculated in hours. This means that if for example a part-time Clerical staff member is 50% FTE (Full Time Equivalent) then they will be entitled to 50% of the total Bank Holiday and University closed days, currently 15.5 days. So 50% would be 7.75 days, or 54.25 hours.

The University's policies on annual leave entitlements can be found at the links below:

Academic and academic related (professional and managerial) staff:

http://hr.leeds.ac.uk/info/36/leave_annual_leave_and_bank_holidays/21/academic_and_academic_related_professional_and_managerial_staff_annual_leave_entitlement

Support staff annual leave entitlement:

http://hr.leeds.ac.uk/info/36/leave_annual_leave_and_bank_holidays/223/support_staff_annual_leave_entitlement

Bank holidays and University closed days for part time staff:

http://hr.leeds.ac.uk/info/36/leave_annual_leave_and_bank_holidays/169/bank_holidays_and_university_closed_days_for_part_time_staff

How to create a leave request:

Click **Working Time** then **Create Leave Request**

Complete the following section and click Send:

Type of Leave

* Type of Leave: Full Day Annual Leave
Description: Full Day Annual Leave

General Data

* Start Date: 20.03.2014
* End Date: 20.03.2014
Approver Name: Miss Susan Birch
New Note:

Click here to select the type of leave required. The 'Maundy Thursday - Half Day' must be used for the Thursday half day before Good Friday.

Enter the Leave dates here. Enter the first working day in the 'Start Date' field and the last working day in the 'End Date' field.

The default approver will always be the person assigned as the manager of the org unit you sit in.

Optional notes can be entered into the 'New Note' box if required.

Entering Leave dates

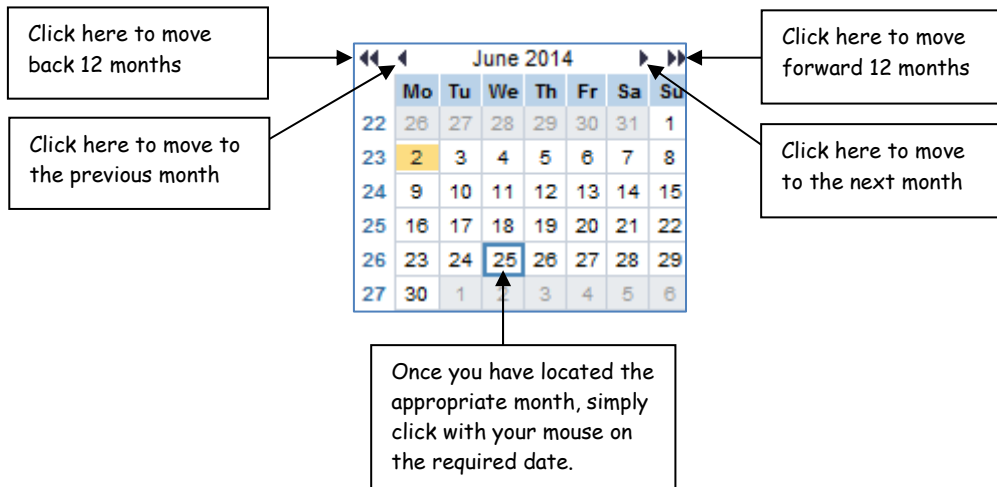
Leave dates can be entered in three ways:

- (i) Type the date directly into the relevant field. Enter the first working day into the 'Start Date' field and the last working day into the 'End Date' field.

The following formats can be used:

- 25.06.2019
- 25062019
- 25.06.19
- 250619
- 25.6.19

- (ii) Use the calendar by clicking on the icon  to the right of the 'Start' and 'End Date' fields:



- (iii) Click into the Personal Calendar at the bottom of the screen. If requesting more than one day, click on the first day and then whilst holding down the **[Shift]** key, click onto the last working day. The date range requested will now be populated in the leave request screen:

* Type of Leave: Full Day Annual Leave
Description: Full Day Annual Leave

General Data

* Start Date: 19.05.2014
* End Date: 23.05.2014
Approver Name:
New Note:

Calendar Team Calendar Time Accounts Leave Requests

You can highlight individual days here to complete your leave request. You can also select a range of days by highlighting

Personal Calendar

View: May 2014 2014 Apply

May 2014 June 2014 July 2014

18 28 29 30 1 2 3 4 22 26 27 28 29 30 31 1 27 30 1 2 3 4 5 6
19 5 6 7 8 9 10 11 23 2 3 4 5 6 7 8 28 7 8 9 10 11 12 13
20 12 13 14 15 16 17 18 24 9 10 11 12 13 14 15 29 14 15 16 17 18 19 20
21 19 20 21 22 23 24 25 25 16 17 18 19 20 21 22 30 21 22 23 24 25 26 27
22 26 27 28 29 30 31 1 26 23 24 25 26 27 28 29 31 28 29 30 31 1 2 3
23 2 3 4 5 6 7 8 27 30 1 2 3 4 5 6 32 4 5 6 7 8 9 10

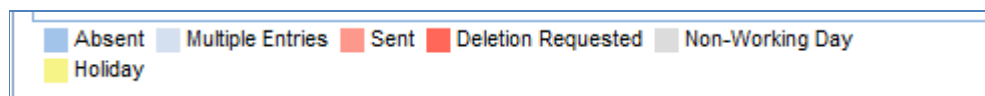
Absent Multiple Entries Sent Deletion Requested Non-Working Day
University Holiday

Once the date range has been selected in the Personal Calendar below the 'Start Date' and 'End Date' fields are automatically updated.

The user selected 19th May, held down **[Shift]** and then clicked on 23rd May. You can see the date range is shaded in yellow and the 'Start Date' and 'End Date' fields above have been updated.

Personal Calendar

The Personal Calendar, located at the bottom of the screen, displays the absence entries of the individual. The calendar is colour-coded to show the various types of absences.




Hovering the cursor over a specific colour-coded date will display information on the specific type of absence.

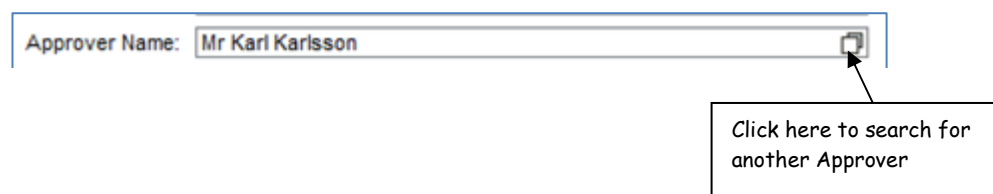
Below is an example of a leave request from a part-time employee. Here it can be seen their leave is requested in hours:

The screenshot shows a web form titled 'Leave Details' with a 'Check' button. The form is divided into two sections: 'Type of Leave' and 'General Data'. In the 'Type of Leave' section, there is a dropdown menu for '* Type of Leave' set to 'Annual Leave Hours', with a 'Description: Annual Leave Hours' below it. The 'General Data' section contains fields for '* Start Date' (19.05.2014), '* End Date' (23.05.2014), 'Absence hours' (18.75), 'Approver Name' (Mr Karl Karlsson), and a 'New Note' text area containing 'As Discussed.'.

Note: The number of absence hours above is determined by the personal work schedule held for the individual on their SAP HR record.

Changing the Approver

An Approver will be displayed which is the default manager of the organisational unit in which the individual is located. The Approver can be changed by clicking on the search icon  and searching in the appropriate fields:

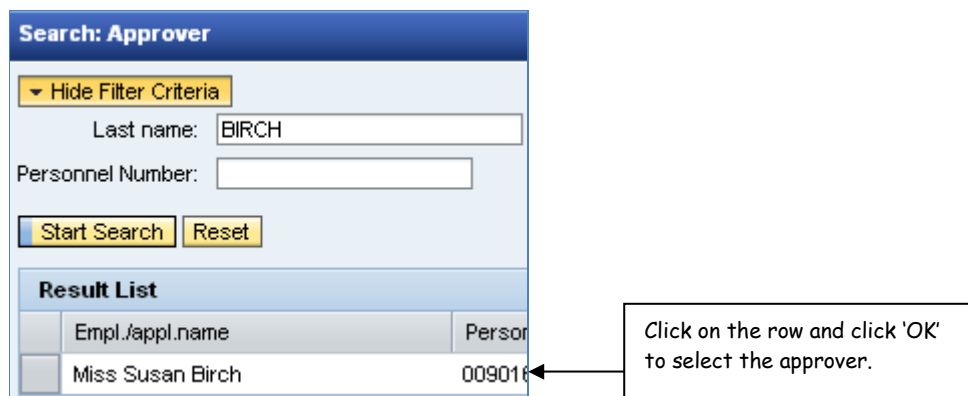


The 'Approver' search box will be displayed. In the example below the individual has typed in the approver's surname.



Click **Start Search** to start the search.

There is one person who meets the search criteria, listed below:



Empl./appl.name	Person
Miss Susan Birch	009016

The approver's name will now be inserted into the appropriate field as shown below:



Once all leave details have been entered click **Check**.

This check will confirm whether there are any issues with the request e.g. a collision with a sickness where the dates are overlapping. It will also check the dates requested are working days according to the work schedule and that there is enough leave available in the quota.



For a part-time member of staff the system will display the number of hours requested into the 'Absence hours' field based on the work schedule held for the individual.

If the data has been entered correctly and there are no issues then a message confirming this will be displayed at the top of the screen:



This guide details all functionality available within the University's Self Service system.


Click here to send the holiday request to the selected approver

Leave Request: Annual Leave Hours, 19.05.2014-23.05.2014 00987344
 Send
 Check of leave request was successful

Leave Details Check

Type of Leave
* Type of Leave: Annual Leave Hours
Description: Annual Leave Hours

General Data
* Start Date: 19.05.2014
* End Date: 23.05.2014
Absence hours: 18.75
Approver Name: Mr Karl Karlsson
New Note: As Discussed.



Click  Send as shown above to confirm the request. A dialogue box summarising the leave request will be displayed:

Leave Request: New


Type of Leave
Type of Leave: Annual Leave Hours

General Data
Start Date: 19.05.2014
End Date: 23.05.2014
Absence hours: 18.75
Approver Name: Mr Karl Karlsson
Note: As Discussed.

OK Cancel

Check you are happy with the details and then click  to confirm or click  to cancel any changes and exit the screen.

The following message will be displayed to confirm that the leave request has been successfully sent to the approver:

Leave Request: New
 Send
 Leave request was sent successfully

This guide details all functionality available within the University's Self Service system.

The requested leave will be displayed within the Leave Requests tab at the bottom of the Create Leave Request screen:

Leave Request: New 00933089

Send

Leave request was sent successfully

Calendar Team Calendar Time Accounts **Leave Requests**

Show from: Apply

Type of Leave	Start Date	End Date	Next Processor	Status	Absence hours	Used
Full Day Annual Leave	25.04.2014	25.04.2014	Miss Susan Birch	Sent	7.50	1 Days

Click here to view
Leave requests

Calendar Team Calendar Time Accounts **Leave Requests**

Show from: Apply

Type of Leave	Start Date	End Date	Next Processor	Status	Absence hours	Used
Annual Leave Hours	19.05.2014	23.05.2014	Mr Karl Karlsson	Sent	18.75	18.75 Hours

Click on the link to view details relating
to the leave request including any notes
entered on the request.

Leave Request: Annual Leave Hours, 19.05.2014-23.05.2014

Type of Leave

Type of Leave: Annual Leave Hours

General Data

Start Date: 19.05.2014
End Date: 23.05.2014
Absence hours: 18.75
Next Processor: Mr Karl Karlsson
Last Note: 16.05.2014 09:31:01 Mr David Davidhoff
As Discussed.

Close

Here you can see any notes
entered within the leave
request.

Maundy Thursday

The university is closed on the afternoon of Maundy Thursday. If an employee wants to take the morning off as annual leave then they need to select the appropriate 'Bank Holiday' leave option from the drop down list. This will normally be 'Bank Holiday hours' for part-time staff and 'Maundy Thursday-Half Day' for full-time staff. ESS will display an error if the normal 'Annual Leave' option is requested.

* Type of Leave: **Bank Holiday Leave Hours**

Description: This absence type must be selected when applying for annual leave hours on Maundy Thursday.

* Type of Leave: **Maundy Thursday-Half Day**

Description: This option must be selected when applying for a half-day's leave on Maundy Thursday.

The Bank Holiday Leave Hours option will be available for part-time staff and the Maundy Thursday-Half Day option will be available for full-time staff.

Cancelling or Amending a Leave Request

Cancelling or amending leave can be done in the '**Leave Overview**' section within '**Working Time**'.

If the leave has not yet been approved, then it can simply be deleted/cancelled and the request will be removed from the Approver's workflow. However if the leave has been approved then the cancellation will need to be sent to the original approver for confirmation before any time is re-credited to the employee's annual leave quota.

You can also create a new leave request by clicking here. See page 9 for further details.

Click here to amend the leave.

Click here to cancel the leave.

Click here to view the leave details in a separate dialogue box including any notes if recorded.


Leave Data Overview								
New								
Show from: [] Apply								
Edit	Cancel	Type of Leave	Start Date	End Date	Next Processor	Status	Absence hours	Used
		Full Day Annual Leave	25.04.2014	25.04.2014	Miss Susan Birch	Sent	7.50	1 Days

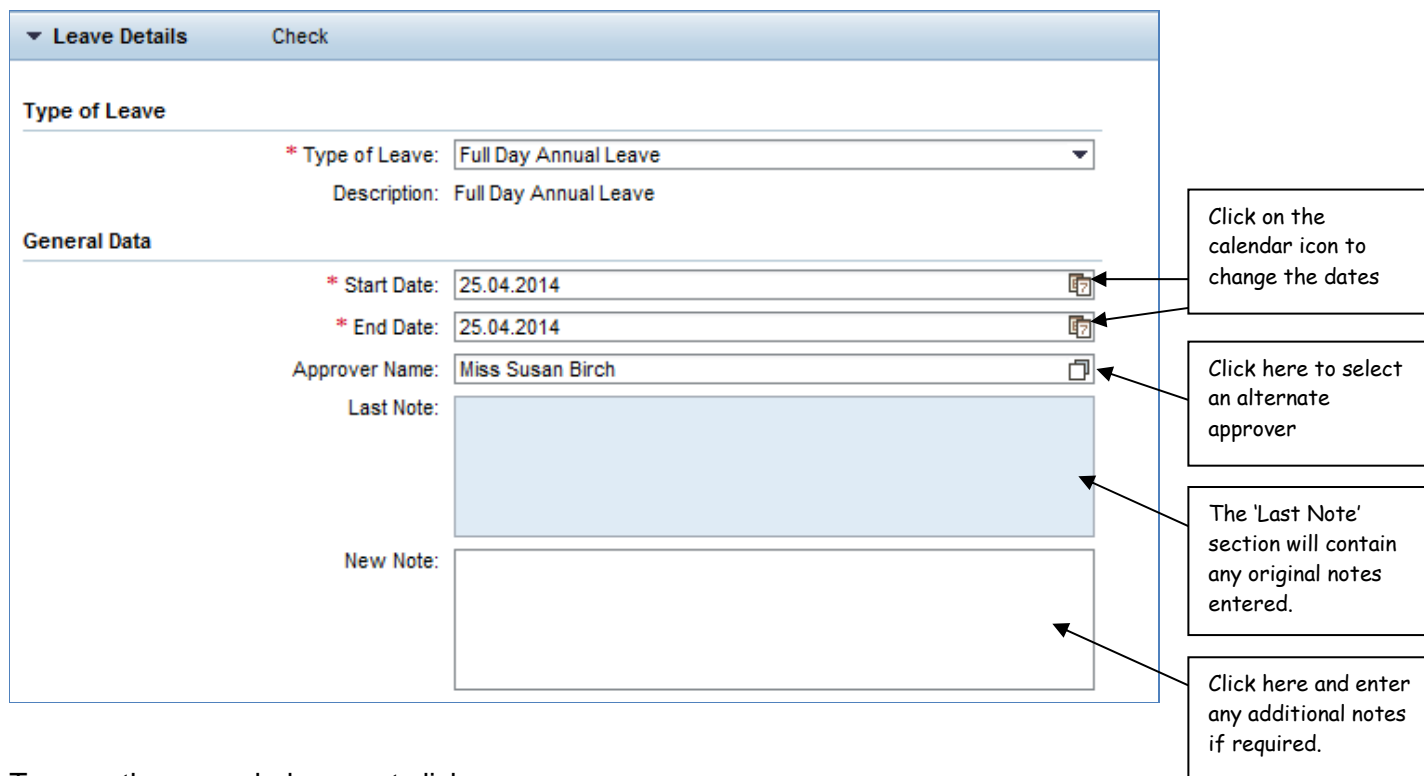
For an approved request:

Click on the Bin icon to the left of the leave request, check the Approver name, click Send and Back and then Ok to confirm.

For an unapproved request:

Click on the Bin icon to the left of the leave request and click Yes to confirm the cancellation.

To amend an existing entry e.g. change the dates of a request or the Approver, click the Edit icon  for the leave that needs amending. The leave request screen will be displayed. Amend the appropriate fields and add any notes.



The screenshot shows the 'Leave Details' form with the following fields and annotations:

- Type of Leave:** A dropdown menu set to 'Full Day Annual Leave'. Description: Full Day Annual Leave.
- General Data:**
 - * Start Date: 25.04.2014 (with a calendar icon)
 - * End Date: 25.04.2014 (with a calendar icon)
 - Approver Name: Miss Susan Birch (with a selection icon)
 - Last Note: A large text area containing original notes.
 - New Note: A text area for additional notes.

Annotations on the right side of the form:

- Click on the calendar icon to change the dates (pointing to the Start Date icon).
- Click here to select an alternate approver (pointing to the Approver Name icon).
- The 'Last Note' section will contain any original notes entered. (pointing to the Last Note text area).
- Click here and enter any additional notes if required. (pointing to the New Note text area).

To save the amended request click:

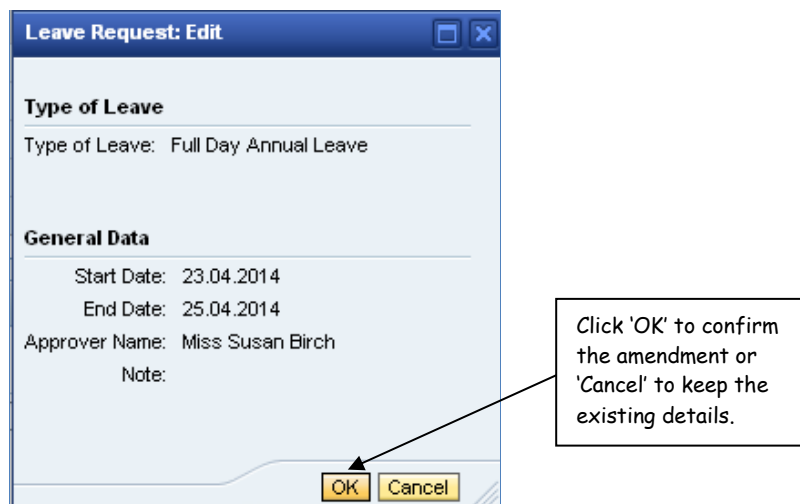
Send and Back

to send the updated record to the selected approver and return to the Overview screen.

Send and New

to send the updated record to the approver and then create a new leave request.

If the details entered are valid then a summary message similar to the one below will be displayed:



The screenshot shows the 'Leave Request: Edit' summary window with the following details:

- Type of Leave:** Full Day Annual Leave
- General Data:**
 - Start Date: 23.04.2014
 - End Date: 25.04.2014
 - Approver Name: Miss Susan Birch
 - Note:

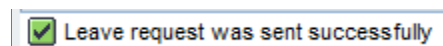
At the bottom of the window are 'OK' and 'Cancel' buttons. An annotation points to the 'OK' button:

- Click 'OK' to confirm the amendment or 'Cancel' to keep the existing details.

If the details entered are not valid for any reason a warning message will be displayed. Amend the request and re-send it.

This guide details all functionality available within the University's Self Service system.

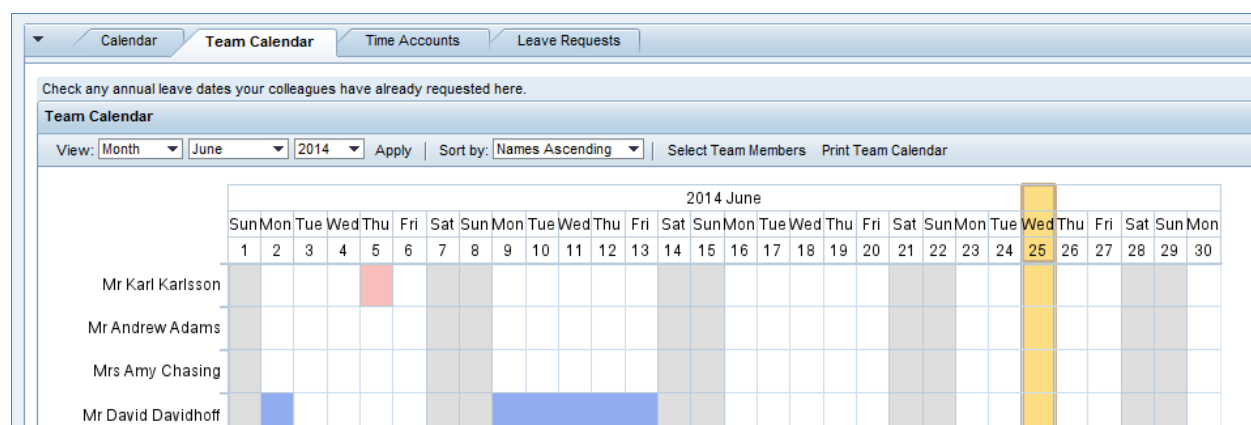
Once the request has been re-submitted a confirmation message similar to the one below will be displayed:



Team Calendar

This can be found in the lower half of the 'Create Leave Request' section.

The Team Calendar displays the absences of other employees that sit within your organisational unit in the SAP HR Organisational Structure. This is useful to view who will be absent on a specific week for example:



Time Accounts

This can be found in both the lower half of the 'Create Leave Request' section and in the 'View Time Account Balances' section within 'Working Time'.

Displays Annual Leave quotas for the selected holiday periods, including the balance remaining:

Time Account	Deduction from	Deduction to	Entitlement	Entitlement Minus Planned
Annual Leave (Days)	01.10.2013	31.12.2014	25.00 Days	4.50 Days
Annual Leave (Days)	01.10.2014	30.09.2015	50.00 Days	26.00 Days
Annual Leave (Days)	01.10.2015	30.09.2016	50.00 Days	50.00 Days

Leave Requests

This can be found in both the 'Create Leave Request' section and in the 'Leave Overview' section.

A summary of leave requested and other absences and the current status for them is displayed:

Type of Leave	Start Date	End Date	Next Processor	Status	Absence hours	Used
Full Day Annual Leave	05.06.2014	05.06.2014	Miss Susan Birch	Sent	7.50	1 Days
Full Day Annual Leave	19.05.2014	23.05.2014	Mr Christopher Taylor	Sent	37.50	5 Days
Half day Annual Leave	21.02.2014	21.02.2014	Mr Christopher Taylor	Approved	3.75	0.50 Days
Full Day Annual Leave	20.02.2014	20.02.2014	Mr Christopher Taylor	Approved	7.50	1 Days
Sickness Absence	10.02.2014	12.02.2014		Approved	22.50	

This guide details all functionality available within the University's Self Service system.

Status	Description
Sent	Request has been sent to manager/approver and is awaiting action
Approved	The Leave has been approved by the approver
Rejected	The Leave has been rejected by the approver
Used	The number of hours or days deducted from the employee's holiday quota

View Time Account Balances

Displays your leave balance and other time account information:

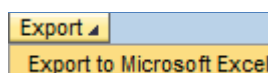
Time Account 00987338				
Time Account: All Types Show from: Apply				
Time Account	Deduction from	Deduction to	Entitlement	Entitlement Minus Planned
Annual Leave (Days)	01.10.2013	31.12.2014	25.00 Days	10.50 Days

Leave Report

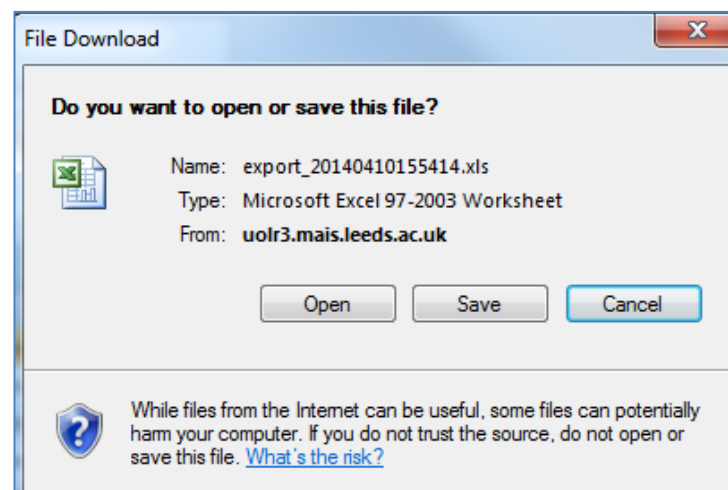
Displays all absences recorded on an employee's SAP HR record for a selected period:

Selections												
Employee: Mrs Deborah Training2												
Att./Absence type: To												
Date: 01.10.2012 To 30.09.2015												
Update List												
View: [Standard View] Export Filter Settings												
Pers.No.	Name of employee or applicant	A/AType	Att./abs. type text	First day of absence	Last day of absence	Start	End time	Hrs	Days	Cal.days	Ded.	
989859	Mrs Deborah Training2	0100	Full Day Annual Leave	15.07.2014	18.07.2014	::	::	30.00	4.00	4.00	4.00	
989859	Mrs Deborah Training2	0100	Full Day Annual Leave	19.11.2014	20.11.2014	::	::	15.00	2.00	2.00	2.00	
989859	Mrs Deborah Training2	0300	Sickness Absence	07.07.2014	07.07.2014	::	::	7.50	1.00	1.00	1.00	

To Export the data to Excel click 'Export' and select 'Export to Microsoft Excel'



A dialogue box similar to the one below will be displayed. Click **Open** to view the spreadsheet or click **Save** to save it to a location of your choice.

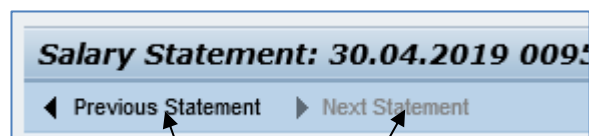


Benefits and Payment

Salary Statement

Displays your payslips. The latest payslip will be displayed by default. The payslip should display in a window within Self Service although in some cases it will open in a new Adobe Reader window.

To display previous payslips click the 'Previous Statement' or 'Next Statement' buttons to view the following (up to the current month) or previous month's statement:



Click here to view
the previous or next
month's payslips

The screenshot shows the "Overview and Selection" section. It includes a dropdown menu set to "All Available" and a table of previous payslips. The table has two columns: "Payment Date" and "Payment Amount". The first row is highlighted in yellow.

Payment Date	Payment Amount
30.04.2019	2,088.07 GBP
29.03.2019	1,980.34 GBP
28.02.2019	1,980.38 GBP
31.01.2019	1,980.38 GBP
21.12.2018	1,980.58 GBP

Alternatively click
here to view a
different month's
Payslip.

Note Individuals will lose access to Self Service (and therefore access to online payslips) if they leave the employment of the University.

This guide details all functionality available within the University's Self Service system.

Printing and Saving Payslips

Functionality to print or save a payslip may vary depending on the versions of Internet Explorer and Adobe Reader installed, as shown in the two images below:

▼ Overview and Selection

To view any available previous payslips, in the table below click on the grey square on the left to highlight the desired month. This will update the payslip on display in the window below. [Hide Quick Help](#)

Show: All Available

Payment Date	Payment Amount
30.06.2014	4,101.43 GBP

Use the icons here to print or save the payslip

▼ Salary Statement

Page: 1 of 1 Automatic Zoom

Pay Advice

00989860 Miss e Training3

UNIVERSITY OF LEEDS

Payroll Area A1	Annual Salary 20,842.00	Hourly Rate	Pay To 30.06.2014
NI Number	Tax Code	Taxable Pay to Date	Tax to Date

Or:

▼ Salary Statement

Pay Advice



00989860 Miss e Training3

UNIVERSITY OF LEEDS

Payroll Area A1	Annual Salary 20,842.00	Hourly Rate	Pay To 30.06.2014
NI Number NS654653D	Tax Code 945D	Taxable Pay to Date 4,984.71	Tax to Date 523.80

Use the icons here to print or save the payslip.

To display these icons you may need to move the mouse over the payslip.

To save a payslip to the M: Drive (or other **secure** location) click on the Save icon  or  and select the desired location from the Save-As pop-up window.

To print a payslip click the Print icon  or  and select the desired printer.

Please note: payslips should only be sent to a **secure** printer, or one you have immediate access to.

Personal Information

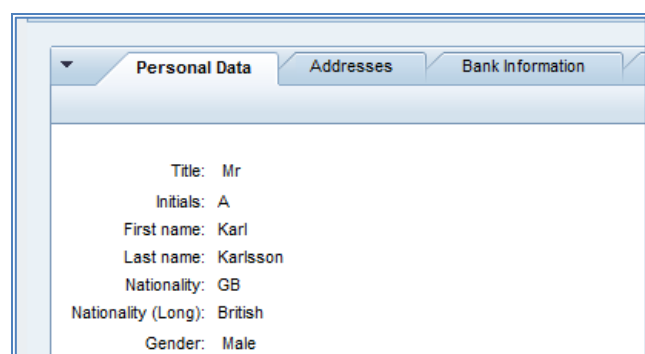
Personal Profile

Personal data, such as addresses and bank details can be created, amended or deleted here. Click the appropriate tab to display the details within that screen.

Personal Data

Displays your personal details such as name, nationality and gender.

This is a view-only screen:

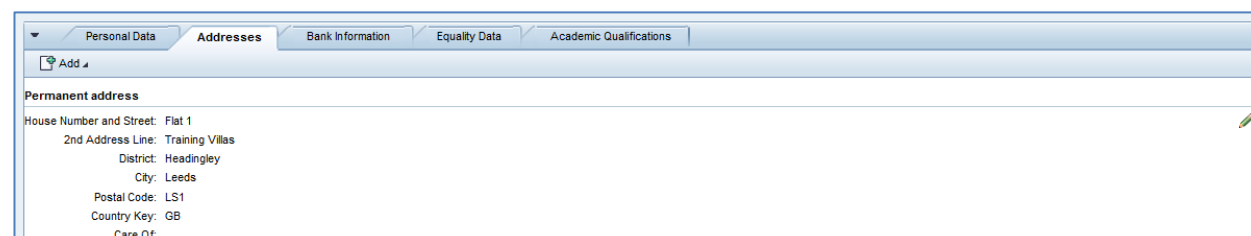


The screenshot shows the 'Personal Data' tab selected. The form displays the following details:

- Title: Mr
- Initials: A
- First name: Karl
- Last name: Karlsson
- Nationality: GB
- Nationality (Long): British
- Gender: Male

Addresses

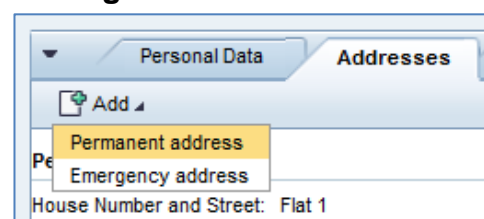
Displays your Permanent Home and (if recorded) Emergency address details:



The screenshot shows the 'Addresses' tab selected. The form displays the following details for a Permanent address:

- House Number and Street: Flat 1
- 2nd Address Line: Training Villas
- District: Headingley
- City: Leeds
- Postal Code: LS1
- Country Key: GB
- Care Of:

Adding Address details



The screenshot shows the 'Addresses' tab with the 'Add' button highlighted. The dropdown menu shows two options: 'Permanent address' and 'Emergency address'.

To add a new address record click on the  icon and select either Permanent address to record a new home address or Emergency address for emergency details.

Postcode Address Lookup

To find an address using the lookup facility, enter the postcode into the **Postal Code Address Lookup** field, click on the button to the right of the field to search and select the desired address from the list.

This guide details all functionality available within the University's Self Service system.

The screenshot displays the 'Address Lookup' section of the ESS system. It includes a 'Country' dropdown menu set to 'United Kingdom'. Below this is a section titled 'Address Lookup: Enter Postcode and Select Address (UK Only)'. This section contains a 'Postal Code' field with 'LS176HD' entered and a magnifying glass icon to its right. Below the postal code field is an 'Address' section with fields for 'c/o:' and 'House Number and Street:'. To the right of the main form, a modal window titled 'Add Permanent address' is open. It shows the same 'Postal Code' field with 'LS17 6HD' and 'Find Address' and 'Cancel' buttons. Below these buttons is a list of search results for 'LS17 6HD', all of which are 'Wyncliffe Gardens, Leeds'. The first result, 'LS17 6HD 1 Wyncliffe Gardens, Leeds', is highlighted in orange. Two callout boxes with arrows provide instructions: one points to the magnifying glass icon, stating 'Enter the postcode into the Postal Code field and click the button to the right to search.', and the other points to the first result in the list, stating 'Click on the line to select the desired address from the list.'

Country: *

Address Lookup: Enter Postcode and Select Address (UK Only)

Postal Code: *

Address

c/o:

House Number and Street: *

Add Permanent address

<input type="checkbox"/>	LS17 6HD 1 Wyncliffe Gardens, Leeds
<input type="checkbox"/>	LS17 6HD 3 Wyncliffe Gardens, Leeds
<input type="checkbox"/>	LS17 6HD 5 Wyncliffe Gardens, Leeds
<input type="checkbox"/>	LS17 6HD 7 Wyncliffe Gardens, Leeds
<input type="checkbox"/>	LS17 6HD 9 Wyncliffe Gardens, Leeds
<input type="checkbox"/>	LS17 6HD 11 Wyncliffe Gardens, Leeds
<input type="checkbox"/>	LS17 6HD 15 Wyncliffe Gardens, Leeds
<input type="checkbox"/>	LS17 6HD 17 Wyncliffe Gardens, Leeds
<input type="checkbox"/>	LS17 6HD 19 Wyncliffe Gardens, Leeds
<input type="checkbox"/>	LS17 6HD 21 Wyncliffe Gardens, Leeds
<input type="checkbox"/>	LS17 6HD 23 Wyncliffe Gardens, Leeds
<input type="checkbox"/>	LS17 6HD 25 Wyncliffe Gardens, Leeds

Information added into any fields through the postcode address lookup should not be amended, though further detail may be added into any fields that remain blank.

If an address cannot be found using the Postcode lookup details can be entered manually instead.

Only UK addresses may be entered here. Any addresses outside of the UK must be entered by a local HR administrator.

Recording Emergency Contact Details

Add Emergency address 00996291

Country: *

Address

c/o:

House Number and Street: *

Address Line 2:

Enter the name of the emergency contact and their relationship to the employee.

When recording emergency details it is important to record the emergency contact's name and relationship to the employee in the 'c/o' field as shown above.

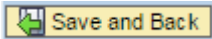
Viewing Emergency Contact Details

If more than one Emergency Address record is created in SAP, Self Service will only display records that are currently valid and future ones.

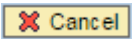
Amending existing address details



Click on the appropriate edit icon and amend the fields.



Click to save the record and go back one screen.



Click to cancel your amendments and retain the original information saved.

Bank Information

Bank Information

This shows the current bank account held by the University that your salary is paid into. You can change the bank details record here.

Payment of salary can only be made to a UK bank account. It is your responsibility to ensure accuracy of the details entered below. The University of Leeds will not be responsible for the non receipt of salary due to incorrectly quoted bank details. The date the new bank account will become effective will depend upon the monthly Payroll timetable. [Hide Quick Help](#)

Payee: Miss Elizabeth Training3

Bank Country: GB

Bank Sort Code: 309491

Bank name: LLOYDS BANK PLC, Launceston

Bank Account: 19870268

Building Society Roll No:

The sort code should be entered as six digits without

Click here to amend or create a new bank record

This shows the main bank account that an employee's salary will be paid into. To **amend** the current record or **create** a new bank record click the **pencil edit icon**.

The new record can be made valid from 'Today' or from a specified date. However, the validity date of the new bank account record will depend on when in the month the record is created, relative to an individual's payroll area and the University's Payroll timetable.

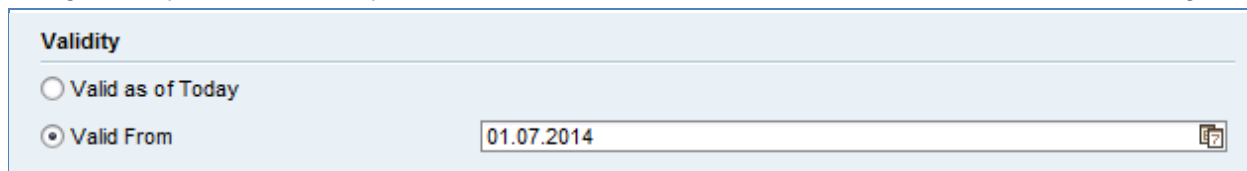
Enter the new Sort Code and Account Number into the respective fields and click 'Save and Back' to save the record and return to the Personal Profile screen.

Note: The sort code should be entered as six digits without spaces e.g. 309491.

If Payroll is locked whilst making these changes then a message will be displayed informing when the account will become valid.

An individual will also receive an email immediately confirming bank details have been updated through Self Service.

It is generally advised to only create new bank account records from the first of the following month.



Validity

☐ Valid as of Today

☒ Valid From 01.07.2014

The bank details will be checked against a predefined set provided by the banks. The sort code needs to be entered in the following format: **001199 (six digits with no spaces)**

If the changes are close to the salary payment date then the following message may be displayed:



Personal Profile 01234567

✓ Data saved successfully


⚠ This month's payment will be made to your existing bank account.

⚠ Bank data saved. Change will not take effect until 01.10.2014.

⚠ Please contact Payroll if the change is urgent and required immediately.

⚠ Payroll email address: payroll@adm.leeds.ac.uk

Deleting a future bank record

Any bank account records that have been created as of a future date are able to be deleted by clicking on the Bin icon  next to the pencil. If you do delete a future record the existing bank account entry will automatically be re-extended.

This guide details all functionality available within the University's Self Service system.

Equality Data

Holds equality information such as ethnic origin, disabilities, gender and religion.

The screenshot shows the 'Equality Data' tab in the ESS system. The form contains the following fields and values:

Field	Value
Ethnic origin:	White
Disability:	No known disability
Gender:	Male
Gender Identity:	Current gender same as gender at birth
Sexual Orientation:	Heterosexual/Straight
Religion:	None
Marriage / Civil Partnership:	Married/Civil Partnership
Caring Responsibilities:	Yes
One or more children:	<input checked="" type="checkbox"/>
One or more disabled children:	<input type="checkbox"/>
For somebody else:	<input type="checkbox"/>

A pencil icon for editing is located at the top right of the form. A message at the top states: 'For information relating the University's Equality policy please see the link on the overview page.' A 'Hide Quick Help' link is also present.

Equality data can be amended by clicking on the pencil edit icon. Changes will be saved effective from the current date.

Academic Qualifications

Information will only be displayed here if the University holds qualification data for you. Currently this is only held for Academic, Academic-related and Technical staff.

The screenshot shows the 'Academic Qualifications' tab in the ESS system. The form displays two sets of qualification data:

Qualification Year	Qualification	Educational Institution	Academic Qualification (HESA)	Academic Discipline
2014	BA	Buckinghamshire Chilterns University College	First Degree	Clinical medicine
				Clinical physiology
				Osteopathy
2014	Dr	College of St Mark and St John	Doctorate	Clinical medicine
				Clinical physiology
				Osteopathy

Expenses

Any bank detail changes will also apply to e-expenses payments. For other e-expenses queries please see the separate guide 'Expenses - Quick Guide for Claimants' on the University's Finance website:

<https://leeds365.sharepoint.com/sites/FinanceAtTheUniversityOfLeeds/SitePages/Expenditure--Expenses.aspx>

Work Information

Work Profile

Contract Detail

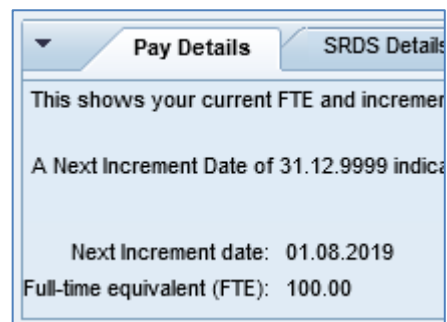
Displays the contract type and contract end date.



The screenshot shows a web interface with three tabs: 'Contract Detail' (selected), 'Pay Details', and 'Pension'. Below the tabs, the text reads: 'Contract type: Permanent' and 'Planned contract end date: 31.12.9999'. At the bottom, there are three more tabs: 'Training', 'Responsibilities', and 'Personal'.

Pay Details

Displays details relating to your pay such as increment date and FTE.

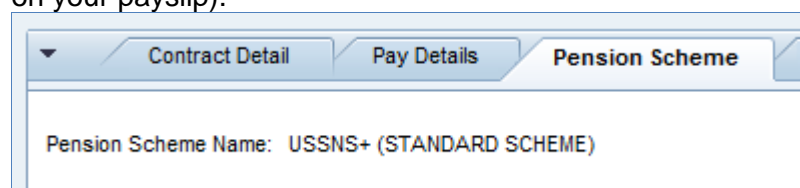


The screenshot shows a web interface with two tabs: 'Pay Details' (selected) and 'SRDS Details'. Below the tabs, the text reads: 'This shows your current FTE and increment', 'A Next Increment Date of 31.12.9999 indicates', 'Next Increment date: 01.08.2019', and 'Full-time equivalent (FTE): 100.00'.

A Next Increment Date of 31.12.9999 indicates that an individual is at the top of their payscale level.

Pension Scheme

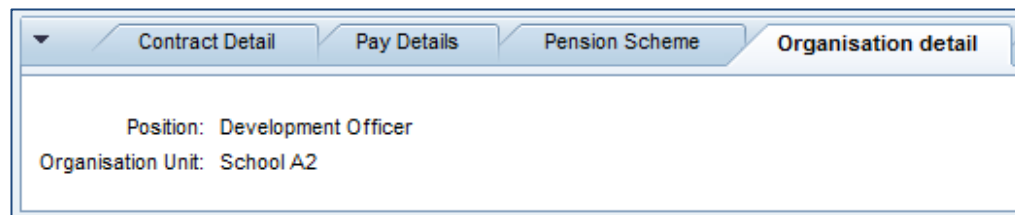
Displays the name of your main pension scheme (Any voluntary contributions can be viewed separately on your payslip).



The screenshot shows a web interface with three tabs: 'Contract Detail', 'Pay Details', and 'Pension Scheme' (selected). Below the tabs, the text reads: 'Pension Scheme Name: USSNS+ (STANDARD SCHEME)'.

Organisation detail

Displays the SAP HR organisational unit and position of the employee.

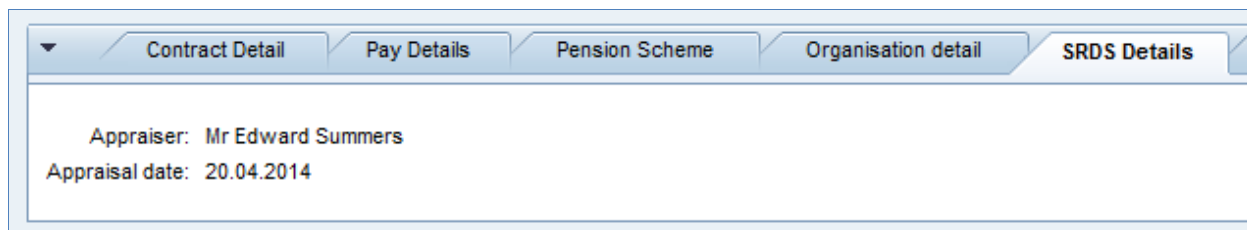


The screenshot shows a web interface with four tabs: 'Contract Detail', 'Pay Details', 'Pension Scheme', and 'Organisation detail'. The 'Organisation detail' tab is selected and highlighted. Below the tabs, the following information is displayed:

Position: Development Officer
Organisation Unit: School A2

SRDS Details

Displays most recent Review/Appraisal details:



The screenshot shows a web interface with five tabs: 'Contract Detail', 'Pay Details', 'Pension Scheme', 'Organisation detail', and 'SRDS Details'. The 'SRDS Details' tab is selected and highlighted. Below the tabs, the following information is displayed:

Appraiser: Mr Edward Summers
Appraisal date: 20.04.2014

HESA Data

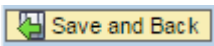
HESA is the Higher Education Statistics Agency. HESA collects data for its own analysis as well as government education departments and funding bodies. The University is required to provide detailed information about anyone who is subject to class 1 National Insurance. The level of data displayed in this tab will be dependent on your staff category.

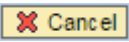
Amending HESA data

It is possible to amend certain data here, depending on your staff category.

If you want to make changes to this screen click the Pencil/Edit icon .

Make the appropriate changes and then either:

Click 'Save and Back'  to save the changes and go back to the HESA main screen.

Click the Cancel button  to cancel your changes.

Training

Displays all training (as recorded on the University's SAP Training and Events Management system) that you have attended and any future courses you may be booked onto.

<div> <div>▼</div> <div>Training</div> <div>Responsibilities</div> <div>Personal Work Schedule</div> </div>					
	Name	Business event	Start date	End date	Location
<input type="checkbox"/>	SAP TEM Co-ordinator	SAPTEMCO_121	31.07.2006	31.07.2006	
<input type="checkbox"/>	SAP TEM Administrator Training	SAP_TEM_ADM	02.08.2006	02.08.2006	
<input type="checkbox"/>	SAP HR Faculty TEM & SRDS	SAP_HRFC_TEM	03.08.2006	03.08.2006	E.C. Stoner Building
<input type="checkbox"/>	SAP TEM Documents and Reports	SAP_TEM_DOC	07.08.2006	07.08.2006	
<input type="checkbox"/>	SAP HR Faculty Employee Maintenance	SAP_HR_MAINT	10.08.2006	10.08.2006	
<input type="checkbox"/>	Intro to Uni - Acad, Acad Rel & Res (1)	01.01.12	06.09.2006	06.09.2006	
<input type="checkbox"/>	MIS OSCAR Replacement Basic Training	MI_OSC	11.09.2006	11.09.2006	E.C. Stoner Building
<input type="checkbox"/>	SAP Equipment Inventory	SAP_FIN_EQ	14.09.2006	14.09.2006	
<input type="checkbox"/>	MIS Advanced Training	MI_ADV	18.09.2006	18.09.2006	E.C. Stoner Building
<input type="checkbox"/>	Intro to Uni - Acad, Acad Rel & Res (2)	01.01.13	18.01.2007	18.01.2007	

Click here to Export the information displayed to Excel

Clinical Information

This screen will only be displayed for some Clinical staff if the appropriate information is held on the system.

<div> <div>▼</div> <div>Training</div> <div>Clinical Information</div> <div>Responsibilities</div> <div>Personal Work Schedule</div> </div>	
Registration type:	Care Council for Wales
Registration number:	12345
Clinical Status:	Clinical academic doctors and dentists
Clinical access confirmed:	<input type="checkbox"/>
Clinical Status:	X
Based at:	
National Training number:	
Specialty:	
Specialty:	
Specialty:	
Clinical sub-specialty:	
Clinical sub-specialty:	
Clinical sub-specialty:	
Honorary NHS type:	Clinical Assistant
Health Trust:	

Responsibilities

Displays any responsibilities that an employee has within their current role. This includes roles such as Leader Manager, Staff Reviewer, Fire Warden, First Aider and various others.



Departmental Responsibility

Valid From: 18.12.2013

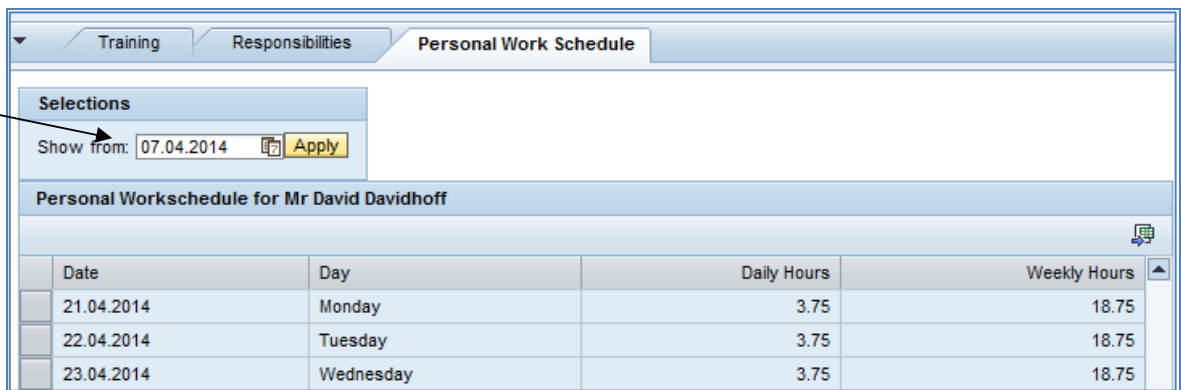
Valid To: 18.12.2016

Responsibility Type: First Aider

Personal Work Schedule

Displays the work schedule the University has recorded for the individual on SAP. To view a different period, simply change the date. Below is an example of a part-time employee (50% FTE):

Change the date and click the Apply button to the right to view different period.

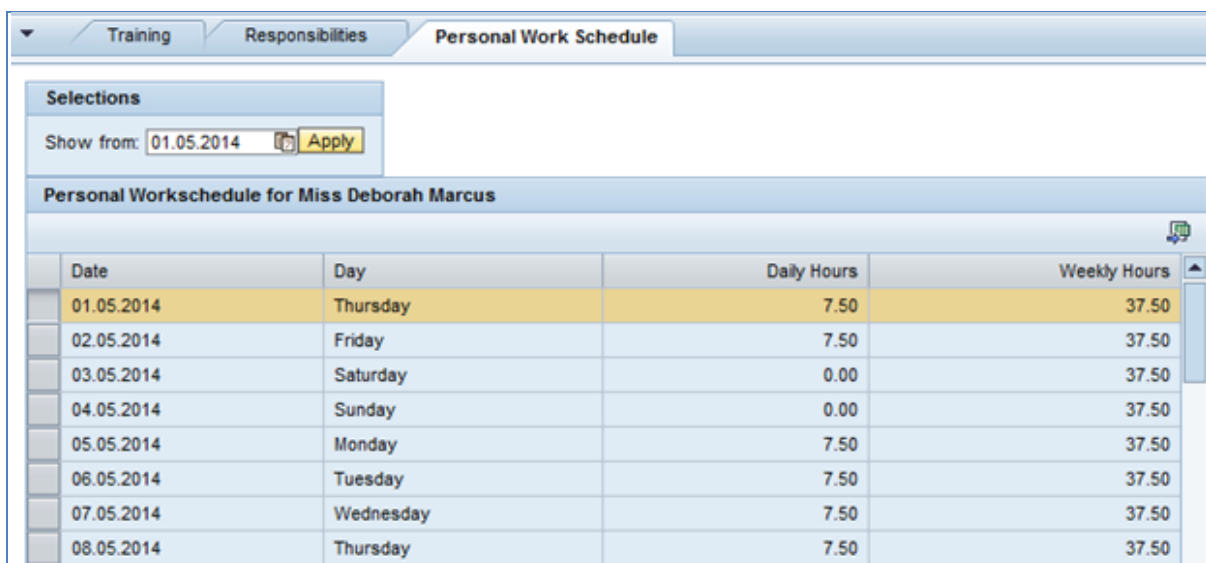


Personal Workschedule for Mr David Davidhoff

Date	Day	Daily Hours	Weekly Hours
21.04.2014	Monday	3.75	18.75
22.04.2014	Tuesday	3.75	18.75
23.04.2014	Wednesday	3.75	18.75

Note: If an employee has a change to their contract that includes a change to their work schedule it is very important that Human Resources are informed of the new schedule.

Below is an example of the Personal Work Schedule for a full-time employee:



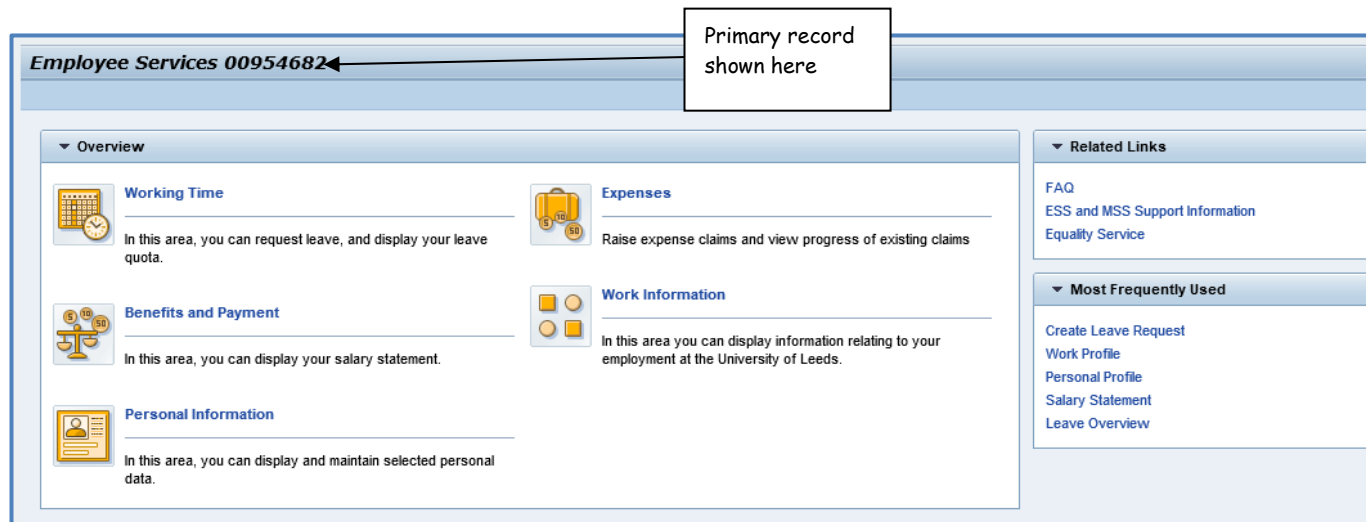
Personal Workschedule for Miss Deborah Marcus

Date	Day	Daily Hours	Weekly Hours
01.05.2014	Thursday	7.50	37.50
02.05.2014	Friday	7.50	37.50
03.05.2014	Saturday	0.00	37.50
04.05.2014	Sunday	0.00	37.50
05.05.2014	Monday	7.50	37.50
06.05.2014	Tuesday	7.50	37.50
07.05.2014	Wednesday	7.50	37.50
08.05.2014	Thursday	7.50	37.50

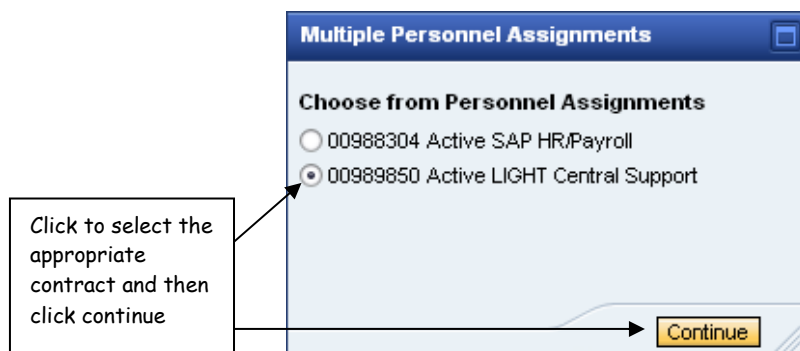
Multiple Employees

For individuals who hold multiple active contracts of employment with the University a screen will be displayed to select the appropriate contract when accessing the *Working Time* and *Work Information* sections.

The Overview screen will always display the primary Personnel Number near the top of the screen:



When accessing the *Working Time* and *Work Information* sections a dialogue box similar to the one below will be displayed so the individual can select which contract they want to view or amend:



988304 – Primary account

989850 – Secondary contract

In this example the user has selected the 'Active LIGHT Central Support' contract. The screen below now shows the appropriate personnel number (00989850) at the top of the screen:

