Manager Self Service

October 15, 2012

InSITE Self Service
# Manager Self Service Presentation

- This presentation is approximately 10 minutes in length.

- The screens will advance automatically, however you can use the enter key to advance a screen if desired.

Manager Self Service Portal Access

- Manager Self-Service is assigned to managers who supervise employees. With this InSITE user responsibility you have the ability to view information about all staff that report to you, as well as staff that report to other managers within your reporting structure.

- You can view the following employee information:
    Employment, Salary, Performance, Absence, Personal, Special, Emergency Contact Information, Documents of Records (Attachments) and Extra Information.

- All information is 'view only.'

- An "add on" to this functionality is that managers will be able to run reports for staff that report to them via the Discoverer Viewer tool. Please refer to the Discover Viewer Basic Training Manual for instructions on how to run reports.

Access to InSITE

- From a City Computer:
  - Click Start, select All Programs
  - Select InSITE from the list
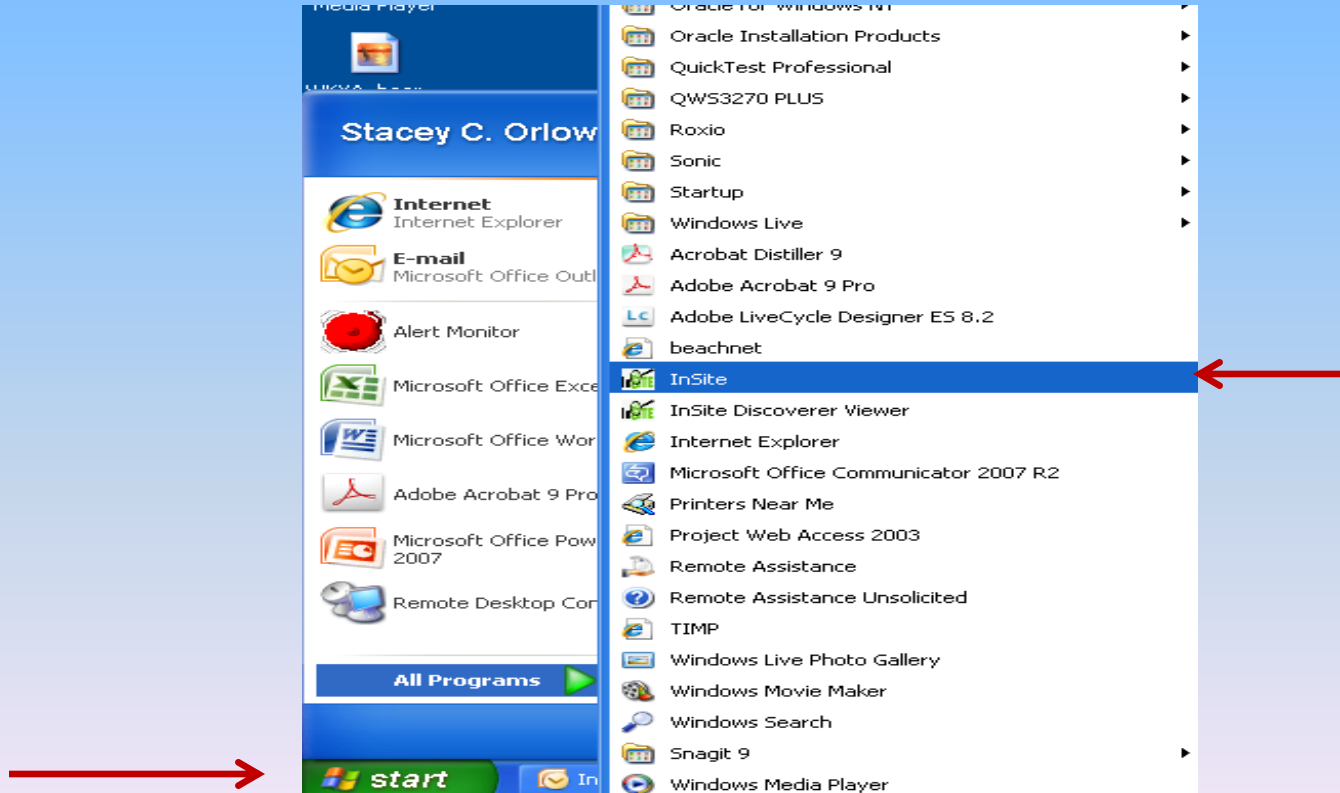
Access to InSITE

- From a non-City computer with internet access

    - Go to vbgov.com

        - Select the employee link
        - Then Select the InSITE Self Service page
        - Next select the Login to InSITE Self Service link

- Or go to https://ssinsite1-pub.opc.oracleoutsourcing.com directly from your internet browser

How Do I Log On

CURRENT InSITE Users:

Your username will be <u>changed</u> to add your InSITE employee number to the end of your username. *The InSITE employee number can be found on your paycheck.*

Example: JSMITHEY, user id 1234 becomes JSMITHEY1234

Your password will remain unchanged

NEW Users:

Your username will be the first character of your first name and the first 7 characters of your last name followed by your InSITE employee number (*The InSITE employee number can be found on your paycheck*)

Example: John Sampleguy employee id 234, would be JSampleg234

The first time you login in to InSITE, your password will be:

Your date of birth, formatted as MMDDYYYY + InSITE employee number

Example, John's date of birth is 1/5/75 = 01051975 and his id is 234

So, his password would be 01051975234

After you login the first time, you will be prompted to change your password

If you are prompted to change your password, please consider these Password Tips

- The password must be at least 8 characters in length.
- The password must have at least one digit.
- The password must have at least one letter.
- The password must **not** have any special characters, such as an underscore, a hyphen or a period.
- The password must **not** have any repeating characters. Example: ilvu22 or iluvv2
- Passwords must be changed every 90 days. **You cannot reuse the last four passwords**.

Manager Self Service Responsibility

- Upon Logon, your Manager Self Service responsibility will display.
- Single click on that responsibility to see the list of links that are available for that responsibility.

The various links you can select will display on the right.
Single click on a menu item.

My Employee Information

The **My Employee Information** section is where you view information for your employees' Employment, Salary, Performance and Absence details dating back to January 1, 2009. It also provides quick and direct access to basic HR data such as your Employee Number, Department, Manager, etc.

To view employee data,
single click on
My Employee Information

My Employee Information

You will see four tabs, each tab will contain the names of the employees you directly supervise. If a direct report also manages staff, they will have a + next to their name. Clicking on the + will expand to show the employees that report to that manager.

My Employee Information

View Discoverer Reports...

Click here to view reports login instructions
Click here to view Position Standards Format
Click here to view Department/Division List

View Hierarchy ▾ Go

Click on a tab to see all of your direct report's information summarized at a glance.

Employment | Salary | Performance | Absence

Focus	Name	Employee Number	Latest Hire Date	Position	Grade	Assignment Category	Assignment Status	Department	Location
	⊟ Test, S								
⊕	⊞ Test, P	11135	01-Jan-2012	B.999914..Account Clerk I.00005	G.10	Fulltime-Regular	Active Assignment	HRD 003 Staffing and Compensation	Mun Ctr Bldg 18-Other Gen Govt Support

Employee Salary Summary

My Employee Information   View Hierarchy ▼ Go

View Discoverer Reports...

Click here to view reports login instructions
Click here to view Position Standards Format
Click here to view Department/Division List

This screen is displayed when the Salary tab is selected for all employees.

All salaries are displayed at a glance.

You can click on the name of an employee to see details (demonstrated later.)

| Employment | Salary | Performance | Absence |

Focus	Name	Annual Salary	Job Title	Grade	Employee Number
	⊟ Test, S				
✦	⊞ Test, P	22,353.60	Account Clerk.Not Sworn.NA	G.10	11135

Employee Performance Summary

My Employee Information

View Discoverer Reports...

Click here to view reports login instructions
Click here to view Position Standards Format
Click here to view Department/Division List

▼ Go

This screen displays when the Performance tab is selected for all employees.

The due date for all employee reviews will be displayed at a glance.

You can click on the name of an employee to see details (demonstrated later). Note, you will not be able to see their individual performance review document.

| Employment | Salary | Performance | Absence |

Focus	Name	Employee Number	Next Review Date	Last Review Date	Last Rating	Related Event
	⊟ Test, S					
⊕	⊞ Test, P	11135	01-Jan-2013	01-Jul-2012	Y - Meets Performance Standards	Interim

Employee List of
Summary Absence Information

View Discoverer Reports

Click here to view reports login instructions

| Employment | Salary | Performance | Absence |

> • This screen is displayed when the absence tab is selected for all employees.
> • It only reflects cumulative hours taken for leave types that have balances maintained in InSITE.
> • To see all leave the employee has taken, please run the Discoverer Viewer report: HR-Leave Monthly Detail

The following section displays detailed historical and future information.

ⓒ Previous 1-10 ▾ Next 10 ⊙

Details	Date	Number Of Hours	Type	Reason	Approver Notified Date
⊞ Show	01-Jun-2012	8	COVB Annual Leave		01-Jun-2012
⊞ Show	31-May-2012	8	COVB Annual Leave		31-May-2012
⊞ Show	30-May-2012	8	COVB Annual Leave		30-May-2012
⊞ Show	29-May-2012	8	COVB Annual Leave		29-May-2012

Employment Information

Next, we will follow the information for one particular employee: "A Employee". Click on the name of the employee to view their additional employment details.

Employment Information

The Employment Tab is highlighted.

Click on the Show link to view additional employment details.

Employment Information

Additional Employment details are displayed

My Employee Information >

Test, P

Effective Date 02-Oct-2012

Employee Number	**11135**
Assignment End Date	
Department	**HRD 003 Staffing and Compensation**
Manager	**Test, S**
Salary	**22,353.60 USD**
Performance Review Date	**01-Jul-2012**

Assignment Start Date	**01-Jan-2012**
Position	**B.999914..Account Clerk I.00005**
Location	**Mun Ctr Bldg 18-Other Gen Govt Support**
Organization Email Address	PTest@vbgov.com
Performance Rating	**Y - Meets Performance Standards**

Click here to view Position Standards Format
Click here to view Department List

Employment Salary Performance Absence

Details	Assignment Number	Assignment Start Date	Assignment End Date	Primary Assignment	Job Title	Grade	Department	Location	Assignment Category
⊟Hide	11135	01-Jan-2012		Yes	Account Clerk.Not Sworn.NA	G.10	HRD 003 Staffing and Compensation	Mun Ctr Bldg 18-Other Gen Govt Support	Fulltime-Regular

Assignment Status	**Active Assignment**	Status Change Reason	**New Hire**
Manager	**Test, S**	Position	**B.999914..Account Clerk I.00005**
Latest Hire Date	**01-Jan-2012**	Payroll	**Semi Monthly**

Salary Information

Click on the Salary Tab.

My Employee Information >

Test, P

Effective Date 02-Oct-2012

Employee Number **11135**
Assignment End Date
Department **HRD 003 Staffing and Compensation**
Manager **Test, S**
Salary **22,353.60 USD**
Performance Review Date **01-Jul-2012**

Assignment Start Date **01-Jan-2012**
Position **B.999914..Account Clerk I.00005**
Location **Mun Ctr Bldg 18-Other Gen Govt Support**
Organization Email Address **PTest@vbgov.com**
Performance Rating **Y - Meets Performance Standards**

Click here to view Position Standards Format
Click here to view Department List

| Employment | Salary | Performance | Absence |

Details	Effective Date	Total Amount of Increase/Decrease	Reason	Annualized Salary	Gross Pay Period Amount (Salaried) or Hourly Rate (Hourly)	Review Date	Grade	Assignment Number	Primary Assignment	Salary Basis
⇒Show	01-Jan-2012		New Hire	22,353.60	931.40	01-Jan-2013	G.10	11135	Yes	Salary

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Privacy Statement

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Click on the Show link to view additional salary details.

Salary Information

Additional salary details are displayed.

🏠 Navigator ▼   ⭐ Favorites ▼   Home Logout Preferences Help

Test, P

Effective Date 02-Oct-2012

Employee Number	**11135**
Assignment End Date	
Department	**HRD 003 Staffing and Compensation**
Manager	**Test, S**
Salary	**22,353.60 USD**
Performance Review Date	**01-Jul-2012**

Assignment Start Date	**01-Jan-2012**
Position	**B.999914..Account Clerk I.00005**
Location	**Mun Ctr Bldg 18-Other Gen Govt Support**
Organization Email Address	PTest@vbgov.com
Performance Rating	**Y - Meets Performance Standards**

Click here to view Position Standards Format
Click here to view Department List

Employment **Salary** **Performance** **Absence**

Details	Effective Date	Total Amount of Increase/Decrease	Reason	Annualized Salary	Gross Pay Period Amount (Salaried) or Hourly Rate (Hourly)	Review Date	Grade	Assignment Number	Primary Assignment	Salary Basis
⊟ Hide	01-Jan-2012		New Hire	22,353.60	931.40	01-Jan-2013	G.10	11135	Yes	Salary

Payroll	**Semi Monthly**	Increase Percentage	
Approved	**Yes**	Grade Minimum	**22,353.60**
Grade Mid	**27,383.16**	Grade Maximum	**32,412.72**
Comparatio	**81.633**		

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Privacy Statement

Performance Information

Click on the Performance Tab.

Click on the Show link to view additional performance details.

Performance Information

Additional performance details are displayed.

Absence Information

Click on the Absence Tab.

View Discoverer Reports

Click here to view reports login instructions

| Employment | Salary | Performance | **Absence** |

The following section displays detailed historical and future information.

◎ Previous 1-10 ▾ Next 10 ◎

Details	Date	Number Of Hours	Type	Reason	Approver Notified Date
⊞ Show	01-Jun-2012	8	COVB Annual Leave		01-Jun-2012
⊞ Show	31-May-2012	8	COVB Annual Leave		31-May-2012
⊞ Show	30-May-2012	8	COVB Annual Leave		30-May-2012
⊞ Show	29-May-2012	8	COVB Annual Leave		29-May-2012

Click on the Show link to view additional absence details.

Absence Information

Additional absence details are displayed.

Employment	Salary	Performance	**Absence**

The following section displays detailed historical and future information.

⊙ Previous 1-10 ▼ Next 10 ⊙

Details	Date	Number Of Hours	Type	Reason	Approver Notified Date
⊟ Hide	01-Jun-2012	8	COVB Annual Leave		01-Jun-2012
		Category **Vacation**		Number Of Hours **8**	
		Authorizing Person		Replacement Person	
⊞ Show	31-May-2012	8	COVB Annual Leave		31-May-2012
⊞ Show	30-May-2012	8	COVB Annual Leave		30-May-2012

Personal Information

The **Personal Information** section enables managers to view their employees personal information, such as their address, phone number and email address.

Personal Information

Select the Employee you wish to view by single clicking on Information Details

Personal Information

Personal information is displayed for "P Test."

Note: if an employee that reports directly to you changes their phone number, you will receive an email. This will keep you informed in case you are maintaining phone lists and/or contact information.

Organization Email Address

- Employees with a City email account should use their City email as their primary email account.
- Employees who do not have a City issued email address may use a personal email address.
- **It is the employee's responsibility to maintain and update a current email address in the application.**
- Any InSITE generated emails will be sent to this email address, such as "Forgot Password" emails.
- Dept PALS will have the ability to update an employee's email address using HR PALS Self Service.
- Do not use a shared email address.

Special Information

- The Special Information form allows managers to view employees data such as alpha status, city equipment that has been distributed **(optionally used)** and other department identification information. The form has three sections:

- Department Identification – additional data specific to your department

- Emergency Operations – alpha status, volunteer preference, shelter assignments

- Equipment Tracking – city equipment that has been distributed in order to perform job duties.

To view your employee information, single click on Special Information.

Special Information

Select the Employee you wish to view by single clicking on Information Details

Special Information

Special Information details are displayed. Contact your Department PALS for questions or changes to the information below.

Special Information

Employee Name	**Test, P**	Employee Number	**11135**
Organization Email Address	PTest@vbgov.com		

Department Identification

Select	Status	Badge Number	Alternate ID Number	Alternate Email	Start Date	End Date
	No results found.					

Driver of City Vehicle

Select	Status	Driver of City Vehicle	Start Date	End Date
◉		Yes	01-Jan-2012	

Emergency Operations

Select	Status	Alpha Status	Emergency Status	Emergency Assignment	Shelter Assignment	Shelter Team Assignment	Comments	Start Date	End Date
◉		Alpha 2 Non Essential	Voluntary Voluntary	CLER Clerical (City)				01-Jan-2012	

Equipment Tracking

Select	Status	Equipment Type	Comments	Start Date	End Date
◉		City ID Card City ID Card		01-Jan-2012	

Home Logout Preferences Help

Extra Information

- The **Extra Information** form allows managers to view employee US Ethnic data or data that is maintained specifically by their department. Currently, there are only three departments (Police, Fire and Parks and Recreation) with specific Extra Information data in InSITE.

To view your employee's information, single click on Extra Information.

Extra Information

Select the Employee you wish to view by single clicking on Information Details

🏠 Navigator ▼   ⭐ Favorites ▼   Home Logout Preferences Help

Extra Information: People in Hierarchy

✔**TIP** Click the "Information Details" link to view additional information for the employee.

Focus	Name	Assignment Number	Job	Department	Information Details
	⊟ Test, S				📇
	Test, P	11135	Account Clerk.Not Sworn.NA	HRD 003 Staffing and Compensation	📇 ←

Home Logout Preferences Help

Extra Information

Extra Information details are displayed. Contact your Department PALS for questions or changes to the information below.

Extra Information

Employee Name	**Test, P**
Organization Email Address	PTest@vbgov.com

Employee Number **11135**

Fire Department Information

Select	Status	Battalion	Assignment	Shift	Start Date	End Date
	No results found.					

Police Department Information

Select	Status	Academy Class#	Academy Ranking	Promotion Qualification Date	Police Employment Date	Bureau Assignment Date	Certified Officer	Certification Entity	Police Role	Location	Supervisor Employee#	Comments	Start Date	End Date
	No results found.													

US Ethnic Origin

Select	Status	Hispanic or Latino of any race	American Indian or Alaskan Native	Asian	Black or African American	Native Hawaiian or Other Pacific	White	Two or More Races (For IPEDS|EEO1|AAP)
◉		Yes	No	No	No	No	No	No

Emergency Contact Information

- The **Emergency Contact Information** form allows managers to view employee's emergency contact information, such as emergency contact name, address, phone number, etc.

To view your employee's information, single click on Emergency Contact Information.

Emergency Contact Information

Select the Employee you wish to view by single clicking on Information Details

Navigator ▼   Favorites ▼   Home   Logout   Preferences   Help

Emergency Contact Information: People in Hierarchy

✔TIP Click the "Information Details" link to view additional information for the employee.

Focus	Name	Assignment Number	Job	Department	Information Details
	⊟ Test, S				🗎
	Test, P	11135	Account Clerk.Not Sworn.NA	HRD 003 Staffing and Compensation	🗎 ←

Home   Logout   Preferences   Help

Emergency Contact Information

Emergency Contact Information details are displayed. Contact your Department PALS for questions or changes to the information below.

Documents of Record

- The **Documents of Record** form allows managers to view documents that have been attached to the employee's record, such as performance feedback, new hire letter, etc.

To view your employee's information, single click on Documents of Record.

Documents of Record

Select the Employee you wish to view by single clicking on Information Details

Documents of Record

Document Types are displayed. Click on icon under View to see additional details. Contact your Department PALS for questions or changes to the information below.

Documents of Record

Click on link under Title to open the document.

View Document of Record

Employee Name	**Test, P**	Employee Number **11135**
Email	**PTest@vbgov.com**	

Document Information

Document Type	**Performance Information**	Valid From **01-Jan-2013**
Issued By		Valid To **31-Dec-2013**
Issued Date		

Documents

Title	Type	Description	Last Updated By	Last Updated	Update	Delete
Merit Evaluation - 01-Jan-2013	File	Merit Evaluation - 01-Jan-2013	JLANG3012	28-Sep-2012	🖉	🗑

Return to Documents of Record for Person

Documents of Record

Click on open in file download box. Word document displays.
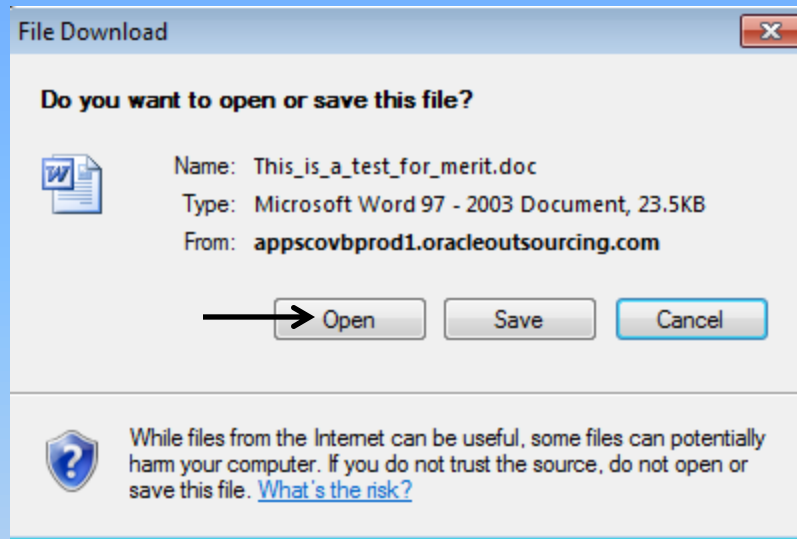
Contact Information

- Username and Password Problems
  - Contact Support Center (Help Desk) at 385-4357

- Questions about data in InSITE
  - Contact department PALS or your supervisor

    For reference, a list of departmental PALS is on the InSITE Web Page

Thank You