cloudpayroll Course Book

Step-by step Answer Guide

Chapter 14

Employee Self -Service Portal (ESS)

Auto Count Sdn Bhd (751600-A)

B2-3A-01, Level 3A, Block B2, Meritus @ Oasis Corporate Park,
No.2, Jalan PJU 1A/2, Ara Damansara, 47301 Petaling Jaya, Selangor Darul Ehsan.
Tel: 603-3000 3000   Fax: 603-7621 0911   www.autocountSoft.com

autocount
Beyond accounting software

Chapter 14 Employee Self -Service Portal (ESS)

Task 14.1
Enable E-Leave & E-Claim

Enable Both E-Leave & E-Claim for Cindy Louder & Apapon Boleh
(Payroll > Employee > Employee Maintenance > Edit)

Enable Both E-Leave & E-Claim for Cindy Louder & Apapon Boleh
(Payroll > Employee > Employee Maintenance > Edit)

Enable Both E-Leave & E-Claim for Cindy Louder & Apapon Boleh
(Payroll > Employee > Employee Maintenance > Edit)

Check User Authorization for APAPON BOLEH
(Payroll > Employee > Employee Maintenance > Edit)

Check User Authorization for APAPON BOLEH
(Payroll > Employee > Employee Maintenance > Edit)

Both E-Leave & E-Claim for Cindy Louder & Apapon Boleh has been enable
(Payroll > Employee > Employee Maintenance > Edit)

Task 14.2

Login as Payroll/Employee User

For this to be working properly, you're require to open 2 different browser at the same time
Due to enhanced security features only 1 email allow to login into 1 browser
ESS page for APAPON BOLEH
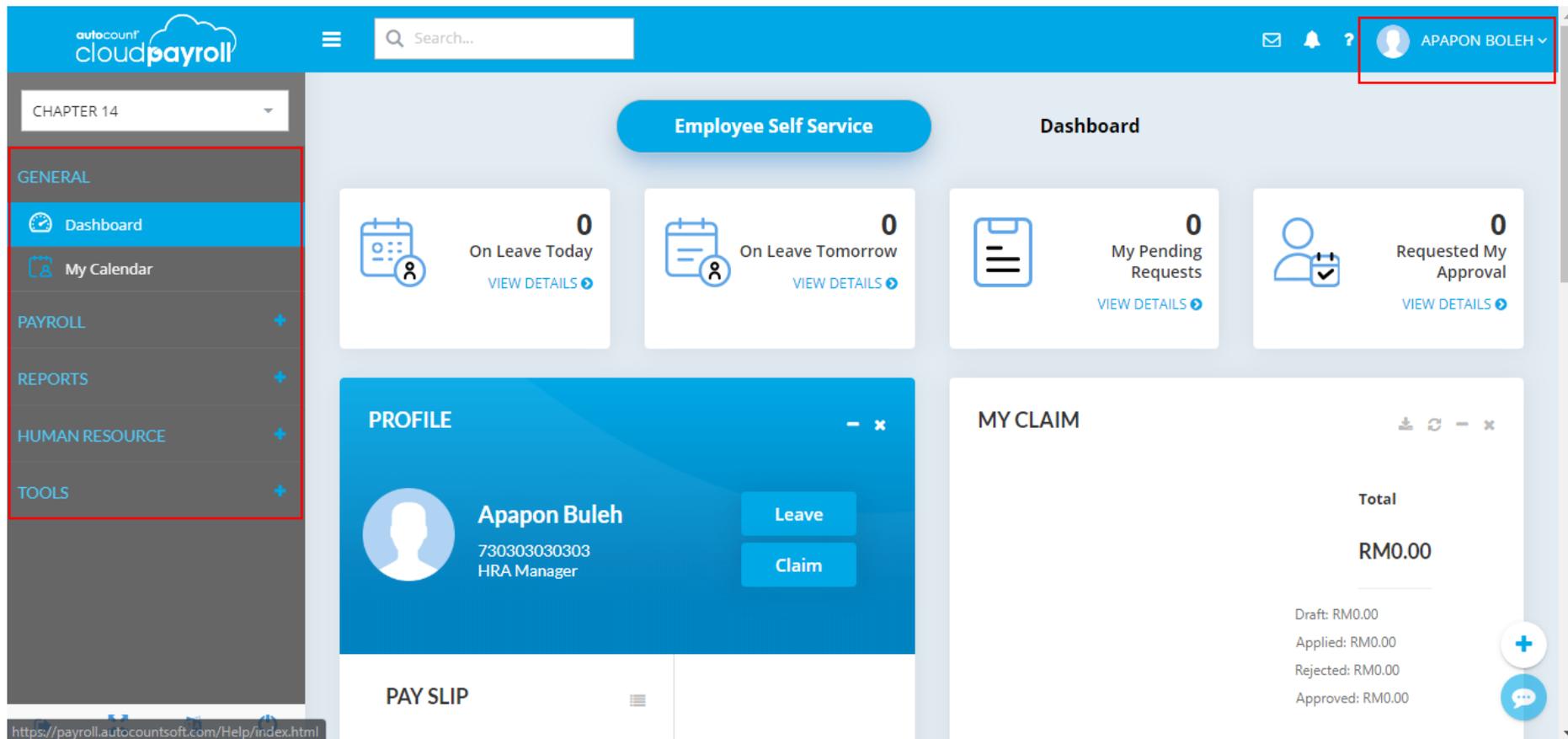
For this to be working properly, you're require to open 2 different browser at the same time
Due to enhanced security features only 1 email allow to login into 1 browser
ESS page for CINDY LOUDER

Task 14.3
Change Password of ESS (Employee User)

view setting how to change both password & email
(Employee's name > Profile)

view setting how to change both password & email
(Employee's name > Profile)

CINDY LOUDER

✉ acpayroll1@gmail.com ✎

1. Click ✎ if you want to change email

Change Your Password

Current Password

Curren Password

New Password

New Password

Confirm Password

Confirm Password

Submit

Tw...ntication

2. Enter password if you want to change password

Two...tional feature to increase the security of your account. When enabled, login requires a code in addition to your password. this code is generated by a separate Authenticator application.

Add Authenticator Application

Task 14.4
Add Leave Request (Employee User)

Create Replacement request Leave for Cindy Louder
4 Method how to create Leave Request
(Cindy Louder > ESS portal)

Create Replacement request Leave for Cindy Louder
 (Cindy Louder > ESS portal)

ADD LEAVE REQUEST ✕

Employee *

Cindy Louder

Leave Type *

RL - Replacement Leave ▾

BF	Entitled	Credited	Expired	Taken	Available
0.0d	1.0d	0.0d	0.0d	0.0d	1.0d

Full Day Leave   Half Day Leave

◀   November 2019   ▶

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

24 November 2019   25 November 2019

Reason *

Vacation

Attachment   Drop your files here

1. Click Save to proceed

Save   Discard

Create Replacement request Leave for Cindy Louder
RL Day applied only available 1, but apply 2, system generate Error Message
(Cindy Louder > ESS portal)

Create Replacement request Leave for Cindy Louder
RL Day applied only available 1, but apply 2, system generate Error Message
(Cindy Louder > ESS portal)

ADD LEAVE REQUEST   ✕

Employee *	Cindy Louder

Leave Type *	RL - Replacement Leave ▾

BF	Entitled	Credited	Expired	Taken	Available
0.0d	1.0d	0.0d	0.0d	0.0d	1.0d

Full Day Leave	Half Day Leave

◀ November 2019 ▶

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

24 November 2019   25 November 2019

Create Replacement request Leave for Cindy Louder
RL Day applied only available 1, but apply 2, system generate Error Message
Change RLeave to apply 1
(Cindy Louder > ESS portal)

ADD LEAVE REQUEST   ✕

Employee *	Cindy Louder

Leave Type *	RL - Replacement Leave

BF	Entitled	Credited	Expired	Taken	Available
0.0d	1.0d	0.0d	0.0d	0.0d	1.0d

Full Day Leave	Half Day Leave

◀ November 2019 ▶

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

24 November 2019

Reason *

VACACION

VACATION

Attachment   Drop your files here

1. Click Save
to proceed

Save   Discard

Create Replacement request Leave for Cindy Louder
Payroll Process from previous chapter, require to delete Payroll Process before able to proceed
(Cindy Louder > ESS portal)

Create Replacement request Leave for Cindy Louder

Payroll Process for November from previous chapter, require to delete Payroll Process before able to proceed

Open Payroll Portal for APAPON BOLEH, delete Payroll Process for Current Month

(Apapon Boleh > ESS portal)

Create Replacement request Leave for Cindy Louder
Delete Payroll Process for Current Month
(Apapon Boleh > ESS portal)

Create Replacement request Leave for Cindy Louder
 (Cindy Louder > ESS portal)

ADD LEAVE REQUEST ✕

Employee *	Cindy Louder
Leave Type *	RL - Replacement Leave ▾

BF	Entitled	Credited	Expired	Taken	Available
0.0d	1.0d	0.0d	0.0d	0.0d	1.0d

Full Day Leave	Half Day Leave

◀		November 2019				▶
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

24 November 2019

Reason *

VACATION

Attachment   Drop your files here

1. Click Save to proceed

Save   Discard

Create Replacement request Leave for Cindy Louder
Pending Request appear at ESS portal
 (Cindy Louder > ESS portal)

Create Annual Leave request for Cindy Louder
 (Cindy Louder > ESS portal)

ADD LEAVE REQUEST   ✕

Employee *
Cindy Louder

Leave Type *
AL - Annual Leave

BF	Entitled	Credited	Expired	Taken	Available
2.0d	12.0d	2.0d	0.0d	5.0d	11.0d

Full Day Leave   Half Day Leave

November 2019

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

25 November 2019

Reason *
VACATION

Attachment   Drop your files here

1. Click Save to proceed

Save   Discard

Create Medical Leave request for Cindy Louder
(Cindy Louder > ESS portal)

ADD LEAVE REQUEST ✕

Employee *	Cindy Louder

Leave Type *	MC - Medical Leave	▼

BF	Entitled	Credited	Expired	Taken	Available
0.0d	18.0d	0.0d	0.0d	2.0d	16.0d

Full Day Leave   Half Day Leave

◀		November 2019				▶
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

26 November 2019

Reason *

FLU

Attachment	Drop your files here

1. Click Save to proceed

Save   Discard

Create Medical Leave request for Cindy Louder
(Cindy Louder > ESS portal)

Create Annual Leave request for Cindy Louder
(Cindy Louder > ESS portal)

ADD LEAVE REQUEST ✕

Employee *   Cindy Louder

Leave Type *   AL - Annual Leave ▼

BF	Entitled	Credited	Expired	Taken	Available
2.0d	12.0d	2.0d	0.0d	5.0d	11.0d

Full Day Leave   Half Day Leave

◀ **November 2019** ▶

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

27 November 2019

Reason *

BANKING MATTER

Attachment   Drop your files here

1. Click Save to proceed

Save   Discard

Create Leave Request for Cindy Louder
Refresh ESS Page to show MY Pending Request for Cindy Louder
(Cindy Louder > ESS portal)

Edit Replacement Leave Request for Cindy Louder
Change Vacation to Personal Matter
(Cindy Louder > ESS portal)

Task 14.5
Edit Leave Request (Employee User)

Edit Replacement Leave Request for Cindy Louder
Change Vacation to Personal Matter
(Cindy Louder > ESS portal)

Task 14.6
Remove Leave Request (Employee User)

Delete Annual Leave Request - Banking Matter
(Cindy Louder > ESS portal)

Delete Annual Leave Request - Banking Matter
(Cindy Louder > ESS portal)

(Cindy Louder > ESS portal)

Task 14.7
Process Leave Application (Payroll User)

Process Leave Request from Cindy Louder
Leave request can be check in 3 method
(Apapon Boleh > ESS portal)

Process Leave Request from Cindy Louder
Leave request can be check in 3 method
(Apapon Boleh > ESS portal)

Process Leave Request from Cindy Louder
Leave request can be check in 3 method
(Apapon Boleh > Login Email)

Process Leave Request from Cindy Louder
Check Details & Approve Replacement Leave – Personal Matter
(Apapon Boleh > ESS portal)

Requested My Approval   ✕

Employee	Requested	Description	Requested Date	↑			
Cindy Louder	Leave	PERSONAL MATTER	21 November 2019		Details	Approve	Reject
Cindy Louder	Leave	VACATION	21 November 2019		Details	Approve	Reject
Cindy Louder	Leave	FLU	21 November 2019		Details	Approve	Reject

10   20   50   Page:

Process Leave Request from Cindy Louder
Check Details & Approve Replacement Leave – Personal Matter
(Apapon Boleh > ESS portal)

Process Leave Request from Cindy Louder
Check Details & Reject Annual Leave - Vacation
(Apapon Boleh > ESS portal)

Process Leave Request from Cindy Louder
Check Details & Reject Annual Leave - Vacation
(Apapon Boleh > ESS portal)

Leave Request ✕

Leave Type

Annual Leave

Employee

Cindy Louder

BF	Entitled	Credited	Expired	Taken	Available
2.0d	12.0d	2.0d	0.0d	5.0d	11.0d

Date	Time
25/11/2019	Full Day

Reason

VACATION

Remarks *

Your AL on 25/11/19 rejected

2. Click Reject to proceed

Approve   Reject

Process Leave Request from Cindy Louder
Check Details & Approve Medical Leave - FLU
(Apapon Boleh > ESS portal)

Requested My Approval   ✕

Employee	Requested	Description	Requested Date	↑	
Cindy Louder	Leave	FLU	21 November 2019		Details Approve Reject

10   20   50   Page:

Process Leave Request from Cindy Louder
Check Details & Approve Medical Leave - FLU
(Apapon Boleh > ESS portal)

Leave Request   ✕

Leave Type

Medical Leave

Employee

Cindy Louder

BF	Entitled	Credited	Expired	Taken	Available
0.0d	18.0d	0.0d	0.0d	2.0d	16.0d

Date	Time
26/11/2019	Full Day

Reason

FLU

Remarks *

Your MC on 26/11/19 approved

3. Click Approve to proceed

Approve   **Reject**

Task 14.8
Leave Approval History (Payroll User)

Check Apapon Boleh Access Right – Leave Transaction
(Tools > User Setting > User Authorization)

Check Apapon Boleh Access Right – ✓ to enable Leave Transaction
(Tools > User Setting > User Authorization)

Apapon Boleh check Leave Transaction history
(Human Resource > My Leave > Leave Approval History)

Task 14.9
Leave Status and Leave Balance (Employee User)

Check Cindy Louder Leave Application by email
(Cindy Louder > Email)

Check Cindy Louder Leave Application by email
(Cindy Louder > Email)

Leave Submission Response

Hi CINDY LOUDER,

Your leave application request on 21/11/2019 has been **approved**.
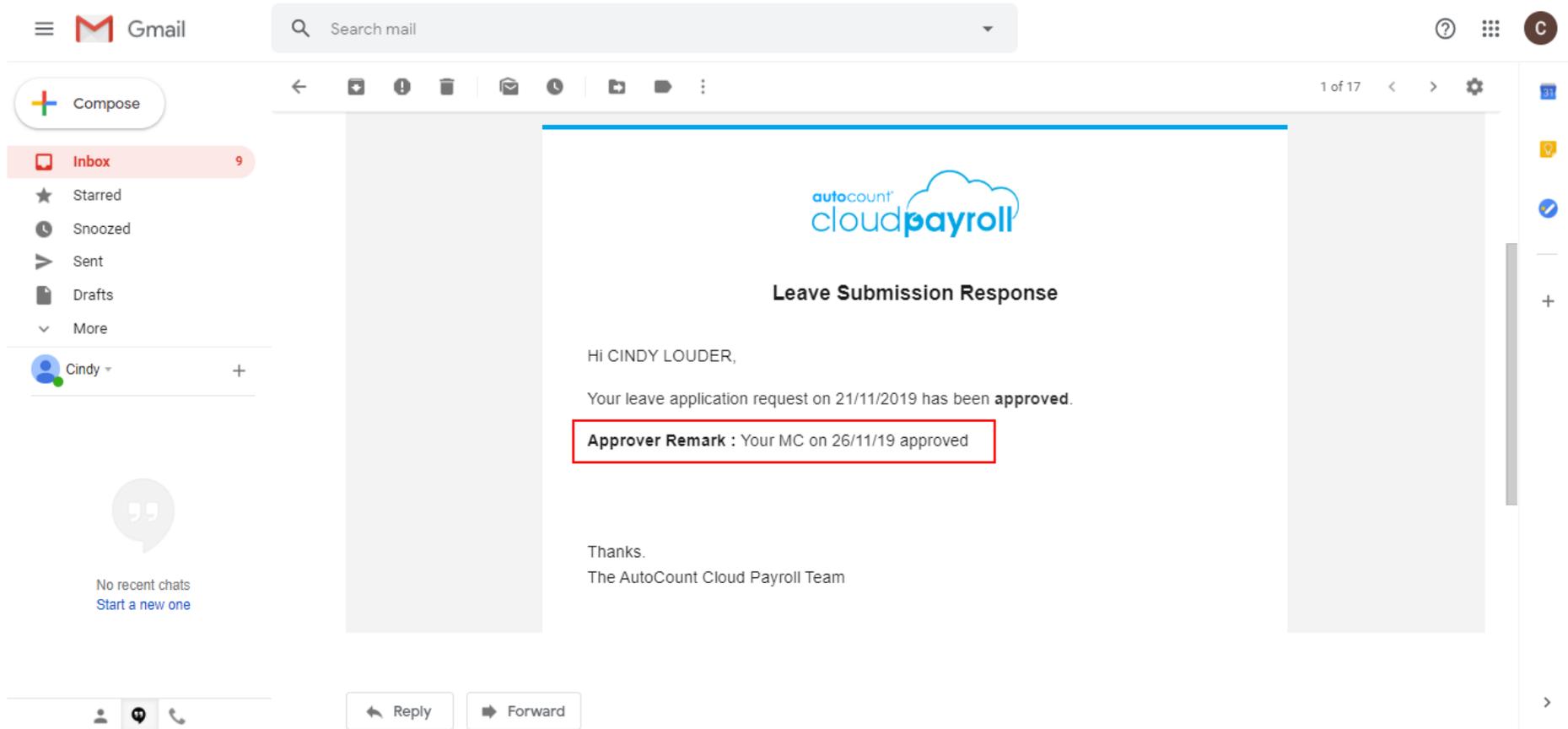
Approver Remark : Your MC on 26/11/19 approved

Thanks.
The AutoCount Cloud Payroll Team

Cindy Louder Leave Application in ESS Portal
Check Notification Icon
(Cindy Louder > ÈSS Portal)

Cindy Louder Leave Application in ESS Portal
Check Apply Leave Listing
(ESS Portal > My Leave > Apply Leaves)

Cindy Louder Leave Application in ESS Portal
Check ESS Leave balance
(General > Employee Self-Service > Leaves)

Cindy Louder Leave Application in ESS Portal
Check ESS Leave balance
(General > Employee Self-Service > Leaves)

LEAVES

Title	BF	Entitled	Credits	Expiring Cred...	Expired Credi...	Taken	Balance
UL - Unpaid Le...	0.0d	365.0d	0.0d	0.0d	0.0d	1.0d	364.0d
AL - Annual Le...	2.0d	12.0d	2.0d	2.0d	0.0d	5.0d	11.0d
ML - Maternity...	0.0d	60.0d	0.0d	0.0d	0.0d	0.0d	60.0d
MC - Medical L...	0.0d	18.0d	0.0d	0.0d	0.0d	3.0d	15.0d
RL - Replacem...	0.0d	1.0d	0.0d	0.0d	0.0d	1.0d	0.0d

Task 14.10
Unpaid Leave (Employee/Payroll User)

Cindy Louder apply Unpaid Leave - Emergency
(General > Employee Self-Service > (Profile) Leave)
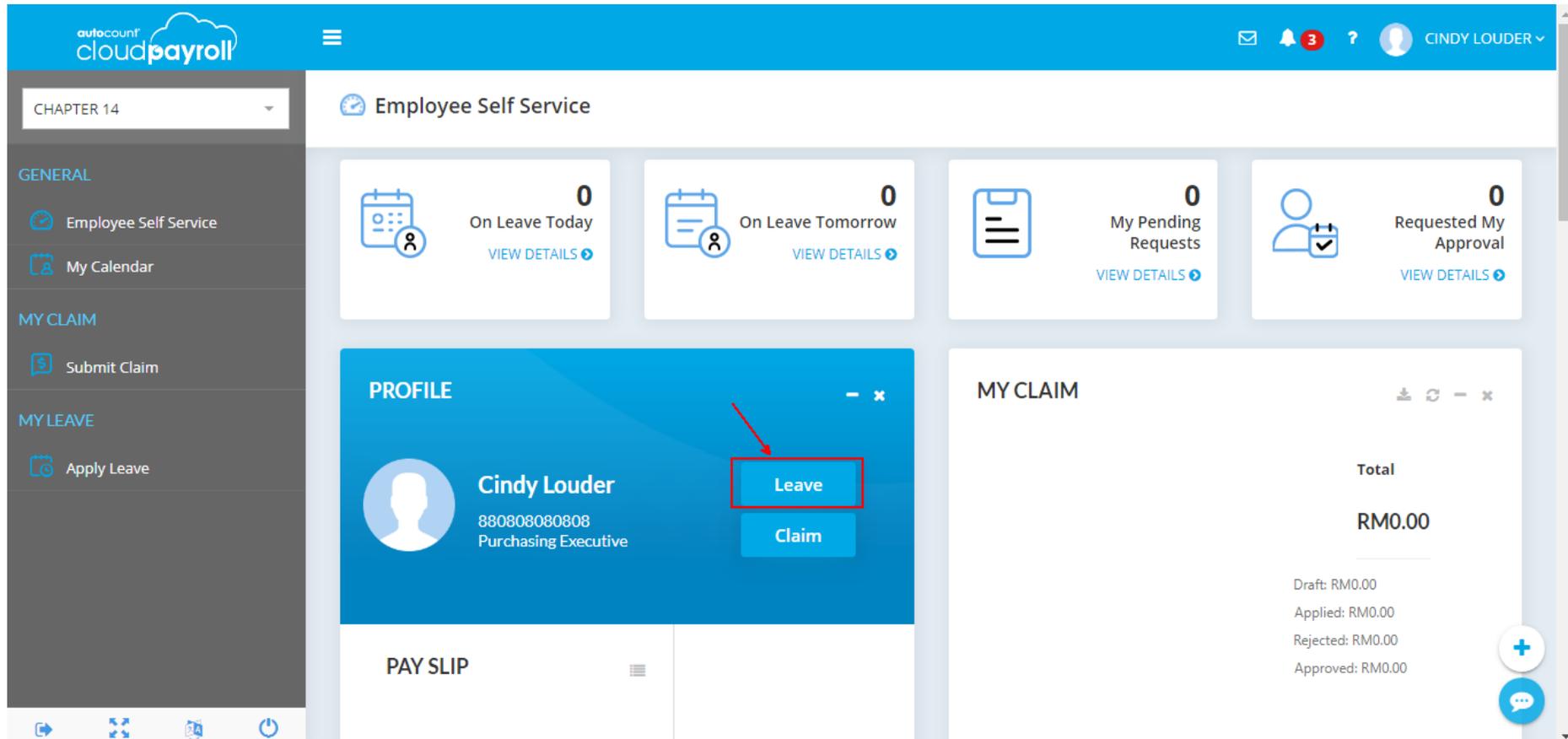
Cindy Louder apply Unpaid Leave - Emergency
(Cindy Louder ESS > General > Employee Self-Service > (Profile) Leave)

ADD LEAVE REQUEST   ✕

Employee *	Cindy Louder

Leave Type *	UL - Unpaid Leave	▼

BF	Entitled	Credited	Expired	Taken	Available
0.0d	365.0d	0.0d	0.0d	1.0d	364.0d

Full Day Leave   Half Day Leave

◄ November 2019 ►

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

28 November 2019

Reason *

Emergency

Attachment	Drop your files here

1. Click Save to proceed

Save   **Discard**

Apapon Boleh process Cindy Louder Unpaid Leave application- Emergency
(Apapon Boleh ESS > General > Dashboard > Requested My Approval)

Apapon Boleh process Cindy Louder Unpaid Leave application- Emergency
(Apapon Boleh ESS > General > Dashboard > Requested My Approval)

Leave Request ✕

Leave Type

Unpaid Leave

Employee

Cindy Louder

BF	Entitled	Credited	Expired	Taken	Available
0.0d	365.0d	0.0d	0.0d	1.0d	364.0d

Date	Time
28/11/2019	Full Day

Reason

Emergency

Remarks *

Your UPL on 28/11/19 approved

1. Click Save to proceed

Approve   Reject

Process New Payroll Process for current month
(Payroll > Payroll Management > Process Payroll > New Payroll Process)

Process New Payroll Process for current month
 (Payroll > Payroll Management > Process Payroll > New Payroll Process)

Process New Payroll Process for current month
(Payroll > Payroll Management > Process Payroll > New Payroll Process)

Process New Payroll Process for current month
Observe the amount being deducted for Unpaid Leave
(Payroll > Payroll Management > Process Payroll > New Payroll Process)

Process New Payroll Process for current month
Observe the amount being deducted for Unpaid Leave
(Payroll > Payroll Management > Process Payroll > New Payroll Process)

Task 14.11
Cancel Approved Leave (Payroll User)

Cindy Louder cancel Unpaid Leave - Emergency
(General > Employee Self-Service > (Profile) Leave)

Cindy Louder cancel Unpaid Leave - Emergency
(General > Employee Self-Service > (Profile) Leave)

Cindy Louder request to cancel Unpaid Leave – Emergency, waiting approval for cancellation
(General > Employee Self-Service > (Profile) Leave)

Apapon approve Cindy Louder request to cancel Unpaid Leave – Emergency
(Apapon Bleh > Human Resource > Leave Management > Leave Transaction)

Apapon approve Cindy Louder request to cancel Unpaid Leave – Emergency
(Apapon Bleh > Human Resource > Leave Management > Leave Transaction)

Leave Cancellation Request   ✕

Leave Type

| Unpaid Leave |

Employee

| Cindy Louder |

BF	Entitled	Credited	Expired	Taken	Available
0.0d	365.0d	0.0d	0.0d	2.0d	363.0d

Date	Time
28/11/2019	Full Day

Cancellation Reason

| Request to cancel |

Remarks *

| Requested by applicant |

> 1. Click Approve to proceed

[Approve] [Reject]

Update changes for Cindy Louder Unpaid Leave cancellation
Reset Payroll Process for Current Month
(Apapon Bleh > Payroll > Payroll Management > Process Payroll > Reset)

Update changes for Cindy Louder Unpaid Leave cancellation
Reset Payroll Process for Current Month
(Apapon Bleh > Payroll > Payroll Management > Process Payroll > Reset)

Update changes for Cindy Louder Unpaid Leave cancellation
Reset Payroll Process for Current Month
(Apapon Bleh > Payroll > Payroll Management > Process Payroll > Reset)

Update changes for Cindy Louder Unpaid Leave cancellation
Reset Payroll Process for Current Month
Observe the change of amount Unpaid Leave
(Apapon Bleh > Payroll > Payroll Management > Process Payroll > Reset)

Task 14.12
Submit Claims (Employee User)

Cindy Louder submit claim application
3 location to create new Claim Application
(Cindy Louder > ESS)

Cindy Louder submit claim application
(Cindy Louder > ESS)

Cindy Louder submit claim application
(Cindy Louder > ESS)

Task 14.13
Approve Claim (Payroll User)

Apapon Boleh process claim application
3 location to process new Claim Application
(Apapon Boleh > General > Dashboard > Requested My Approval)

Apapon Boleh process claim application
3 location to process new Claim Application
(Apapon Boleh > General > Dashboard > Requested My Approval)

Apapon Boleh process claim application
3 location to process new Claim Application
(Apapon Boleh > General > Dashboard > Requested My Approval)

Apapon Boleh process claim application
Click details to check application
(Apapon Boleh > General > Dashboard > Requested My Approval)

Requested My Approval   ✕

Employee	Requested	Description	Requested Date ↑	
Cindy Louder	Claim	Staff Claim 11/2019	28 November 2019	Details Approve Reject

10 20 50   Page:

https://payroll.autocountsoft.com/#

Apapon Boleh process claim application
Approve Claim Application for Cindy Louder,edit amount only allow claimable amount 100
(Apapon Boleh > General > Dashboard > Requested My Approval)

Apapon Boleh process claim application
Approve Claim Application for Cindy Louder but only allow claimable amount
(Apapon Boleh > General > Dashboard > Requested My Approval)

Apapon Boleh process claim application
Approved Claim application, inserted into Adhoc Item for current month
(Apapon Boleh > Payroll > Payroll Management > Adhoc Payroll Item (Claim))

Task 14.14
Claim Approval History (Payroll User)

Check Apapon Boleh Access Right for Claim Transaction History
(Apapon Boleh > Tools > User Setting > User Authorization)

Check Apapon Boleh Access Right for Claim Transaction History
(Apapon Boleh > Tools > User Setting > User Authorization)

Check Apapon Boleh Access Right for Claim Transaction History
Enable Claim Transaction & Balance
(Apapon Boleh > Tools > User Setting > User Authorization)

Check Approval History
(Apapon Boleh > Human Resource > My Claim > Claim Approval History)

Task 14.15
Claim Status (Employee User)

Check Claim Application appoval by Email
(Cindy Louder > email)

Check Claim Application appoval by notification icon
(Cindy Louder > ESS)

Check My Claim amount Reject / Approve
(Cindy Louder > ESS)

Check Claim submission status
(Cindy Louder > My Claim > Submit Claim)

Task 14.16

Process Payroll for Current Month (Payroll User)

Reset current month Payroll Process to check Claim amount for Cindy Louder
(Apapon Boleh > Payroll > Payroll Management > Process Payroll)

Reset current month Payroll Process to check Claim amount for Cindy Louder
(Apapon Boleh > Payroll > Payroll Management > Process Payroll)

Reset current month Payroll Process to check Claim amount for Cindy Louder
(Apapon Boleh > Payroll > Payroll Management > Process Payroll)

Reset current month Payroll Process to check Claim amount for Cindy Louder
Observe change in Claim amount
(Apapon Boleh > Payroll > Payroll Management > Process Payroll)

Commit Current month Payroll Process
(Apapon Boleh > Payroll > Payroll Management > Process Payroll)

Commit Current month Payroll Process
(Apapon Boleh > Payroll > Payroll Management > Process Payroll)

Commit Current month Payroll Process
(Apapon Boleh > Payroll > Payroll Management > Process Payroll)

Task 14.17
View/Print Pay Slip (Employee User)

View Payslip for Cindy Louder – Current month (processed month from task 14.16)
(Apapon Boleh > General > Employee Self-Service > Pay Slip)

View Payslip for Cindy Louder – Current month (processed month from task 14.16)
(Apapon Boleh > General > Employee Self-Service > Pay Slip)

CHAPTER 14

PAYSLIP

Name	: **Cindy Louder**			Nov 2019
NRIC	: 880808080808	SOCSO	: 880808080808	Monthly
DEPT	: PUR - Purchasing	EPF	: 80808080	
EMPLOYEE NO : E002/1510		TAX	: SG88008800	

EARNING	RM	DEDUCTION	RM	OTHER			
Basic Salary	3,600.00	Employee EPF	383.00	---LEAVE TYPE---	Entitle	Taken	Balance
Claim	100.00	Employee SOCSO	17.25	Annual Leave	16d	5d	11d
		Employee EIS	6.90	Maternity Leave	60d	0d	60d
		Unpaid Leave	138.46	Medical Leave	18d	3d	15d
				Replacement Leave	1d	1d	0d
				Unpaid Leave	365d	1d	364d
GROSS PAY	3,700.00	TOTAL DEDUCTION	545.61				
		Net Pay	**3,154.00**				
PCB: Monthly: 0.00							

	<-----------CURRENT MONTH------------>				<------------------------YEAR-TO-DATE------------------------>						RECEIVED BY
	E.P.F	SOCSO	E.I.S	Tax	E.P.F	SOCSO	E.I.S	Tax	GROSS PAY	NET PAY	
EMPLOYEE :	383.00	17.25	6.90	0.00	1,967.00	90.25	36.10	127.85			
EMPLOYER :	453.00	60.35	6.90		2,325.00	315.85	36.10				PAY BY :
TOTAL :	836.00	77.60	13.80		4,292.00	406.10	72.20		19,613.08	17,253.45	Bank Transfer

Note:

Task 14.18
To Do List (Payroll User)

Create a To Do List for Today
2 location to create To Do Lost
(Apapon Boleh > ESS)

Create a To Do List for Today
2 location to create To Do Lost
(Apapon Boleh > ESS)

Create a To Do List for Today
2 location to create To Do Lost
(Apapon Boleh > ESS)

Create a To Do List for Today
Logout & Login again
(Apapon Boleh > ESS)

End of chapter 3