



Unicorn HRO

Employee Self Service Home Page Set-Up

Overview

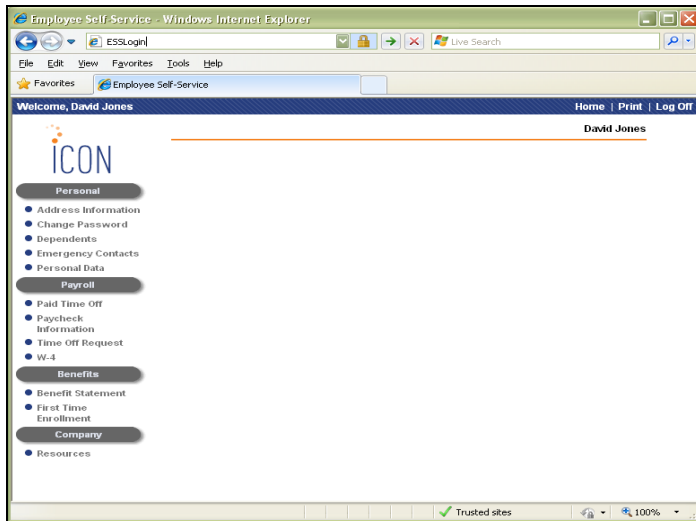
ESS Login Groups may be set up and used to define different Employee Security settings. They may also be used to set up home pages for various groups of employees. If an employee does not fall into the definition of any ESS Login Groups, or if no ESS Login Groups are set up, the *Default setting will be used when the employee logs in to Employee Self Service to determine which functions to display in the menu, as well as the home page to display.

In order to use this functionality, follow these steps in the order shown here:

- 1) In the ESS Login Groups common object, add the groups you wish to use. You may define as many groups as needed. Note that each group can be used more than once when defining entries in the **ESS Login Groups** function. For example, an “Active 1” group can be defined for Organizations A, B and C, and an “Active 2” group can be defined for Organizations D, E and F. Both groups can be set up with their own rules in **Employee Security**, as well as have their own home pages uploaded using **ESS News Upload**.
- 2) In **Employee Security**, select the Login Group you wish to work with, and select the functions that employees in that group are allowed to access. If an employee does not fall into one of the ESS Login Groups, the *Default entry in **Employee Security** will be used when he or she logs on to Employee Self Service. You may use the “Copy to Login Group” feature in **Employee Security** when setting up groups. **Employee Security** must be set up before adding ESS Login Groups. Otherwise, an employee in an ESS Login Group would have no access to any functions in Employee Self Service if he or she logs on before the **Employee Security** entries are set up.
- 3) In **ESS News Upload**, upload the home page files if you wish to display a different home page in Employee Self Service for employees in a particular ESS Login Group. You may zip your files or leave them unzipped. See the help text for **ESS News Upload** for instructions on how to do this.
- 4) After the previous steps have been completed, go to **ESS Login Groups**. Add a record for each group, selecting the organization and employment status(es). When an employee logs in to Employee Self Service, the system will check the first record in **ESS Login Groups** to see if the employee meets the criteria for that record. If not, it will check the second record, etc., until it finds the record the employee belongs to. It will use the home page and **Employee Security** corresponding to that group. If the employee does not meet the criteria for any ESS Login Group, settings for the *Default group will be used.

Creating Custom ESS News Pages

Normally, when an employee logs into Employee Self-Service, he or she is presented with a system default ESS news page consisting of only the employee's name:



You can create your custom ESSNews.htm using any standard web authoring application. Popular choices are Adobe Dreamweaver and Microsoft Word. You could even create it using any text editor if you are familiar with the HTML language and notation.

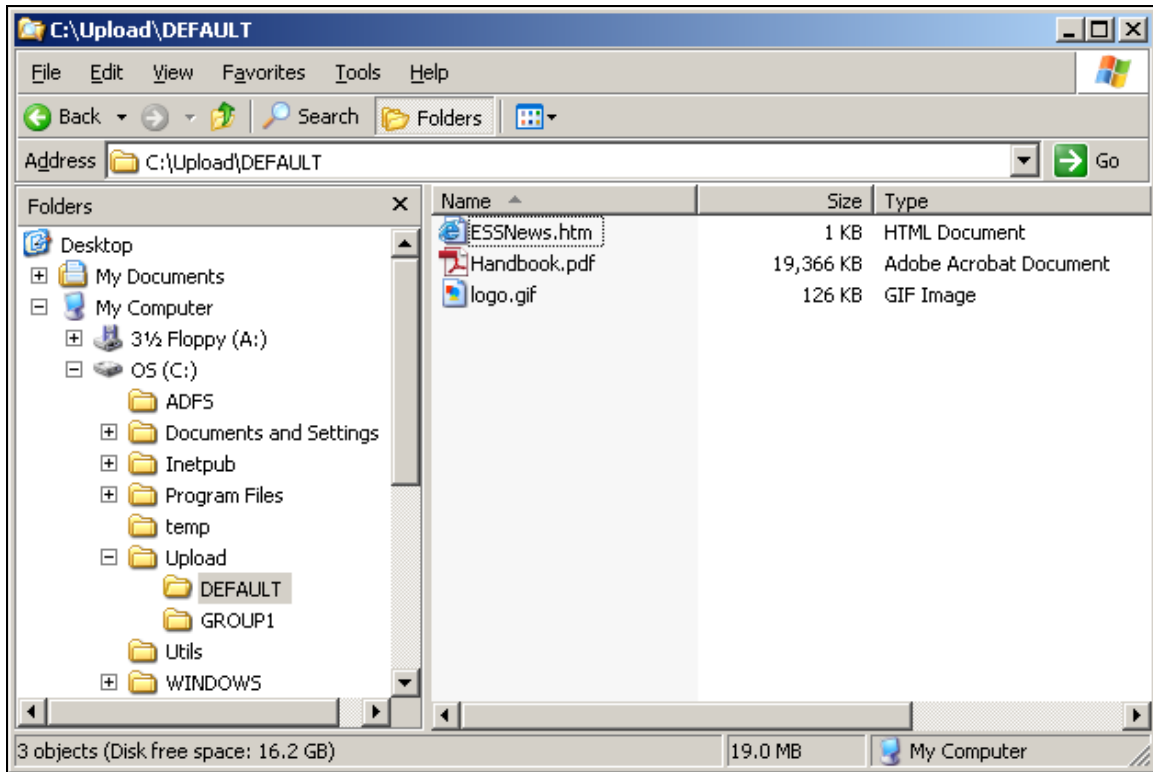
An ESS News page will consist of a folder containing an ESSNews.htm HTML web page and any associated content such as linked web pages and graphics. The links to any associated content must be relative to the ESSNews.htm page and must not include any drive letter references.

If you are only going to have one customized ESS News page for all your employees, you will need to put your files into a folder called “DEFAULT”. To help organize the project, you will probably want to put this into a parent folder (i.e. “C:\ESSNews” or “C:\Upload”).

If you are going to use ESS Login Groups, you will create a separate folder for each group and name it the same as the Code you specified on the Common Object Dictionary for Login Groups page.

Even if you are using ESS Login Groups, you may still want to setup a DEFAULT page in case an employee doesn't match any of the rules you specify on the ESS Login Groups page.

The following screenshot shows an example with a DEFAULT folder and a GROUP1 folder:



In this example, the DEFAULT folder contains the required ESSNews.htm file as well as some associated files.

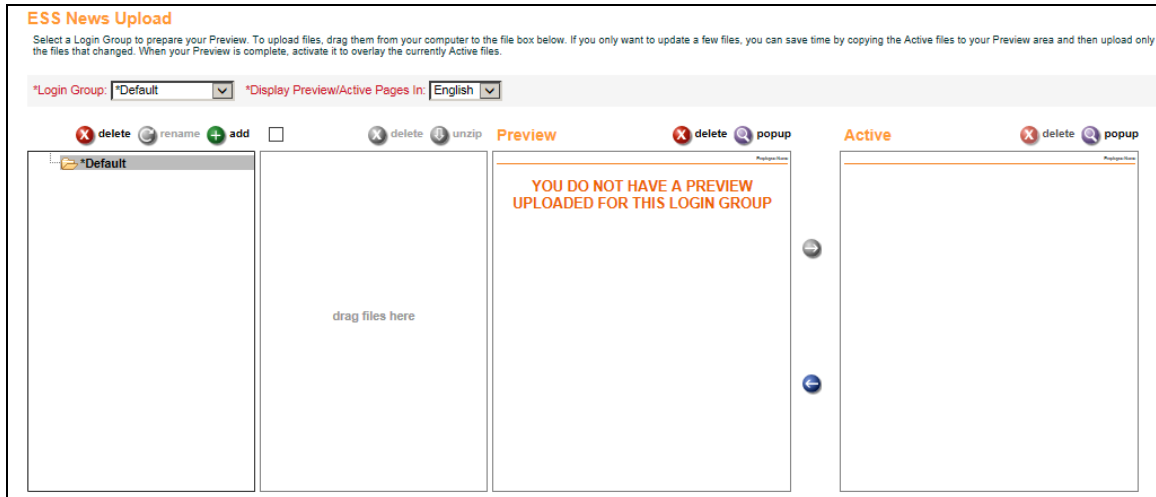
If you create multiple ESS News pages, be careful not to include the group folder name in any references. This is because the DEFAULT and ESS Login Group folder names are encrypted after they are uploaded.

Uploading Files

This function allows you to upload your custom webpage content into a Preview area. Use this area to test your content, including links, before activating it. Employee will not see the content in Employee Self Service until you activate it. In some cases, employees may have to refresh their browser or clear their browser cache in order to see the latest changes.

Select the Login Group you want to work with. The leftmost folder box will show the Login Group and any subfolders you created. The top folder is the name of the Login Group. If the Login Group folder hasn't been created yet it will appear as grayed out. The file box (second from the left) will show the files in the selected preview folder. If you wish to display a preview page or active page in Spanish, select it from the Language field.

You may add a subfolder by highlighting a folder and clicking on the **add** button. If you wish to rename a subfolder, highlight it and click on the **rename** button. Note that you may not rename the top folder contain the Login Group name. To delete a folder, highlight it and click on the **delete** button. If you deleted the parent Login Group folder, it will remove all the contents and put it back in grayed out mode.



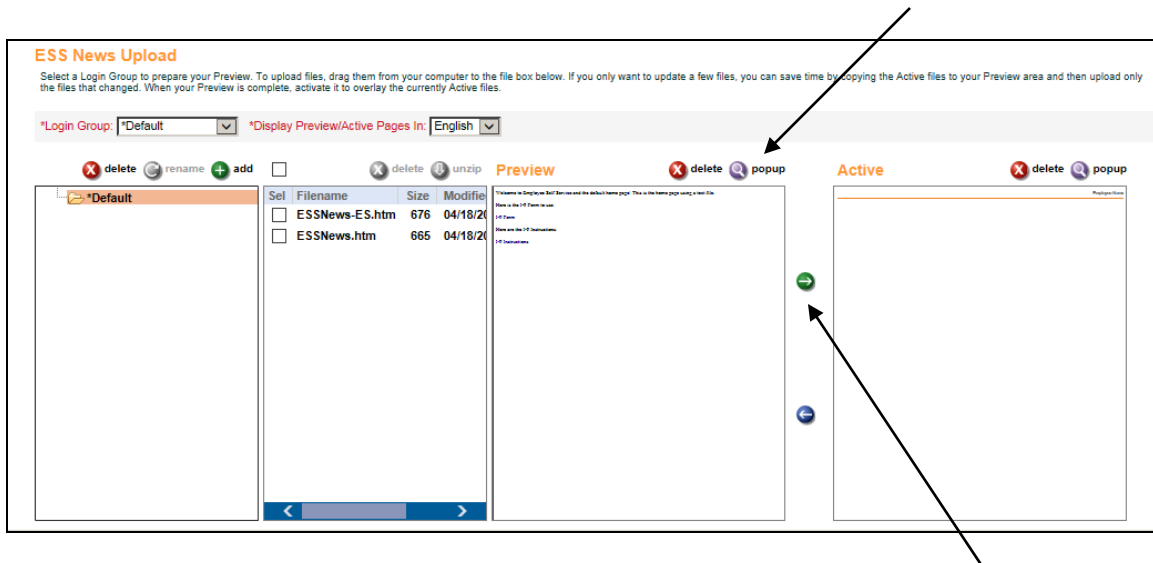
If your home page includes references to other content that you provide, do not include the name of the top folder with the Login Group name. For example, if you reference a document in a "pdf" subfolder, reference it as "pdf/mydocument.pdf" rather than "logingroup/pdf/mydocument.pdf".

To upload files, click on the applicable folder or subfolder. Drag the file(s) from your computer (i.e. Windows Explorer) into the file list box, the second box from the left. You may use zip files to upload groups of files and folders, but it is not required. Only files can be dragged, not folders. If you want to bring over a whole site with the files and folders, you must zip them first. One of the other advantages of zipping your files is the files will retain the modified date from your computer. When you drag files in directly, they use the current date as the modified date. Zip files must use the "Zip 2.0" format and have a .zip extension. Uuencoded files are not accepted.

If the Login Group folder hasn't been created yet, the folder list will show it grayed out. If you drag a zip file in at this point, it will automatically be unzipped. If you drag a zip file after the Login Group folder is created, it will upload the zip file as is and you can unzip it manually.

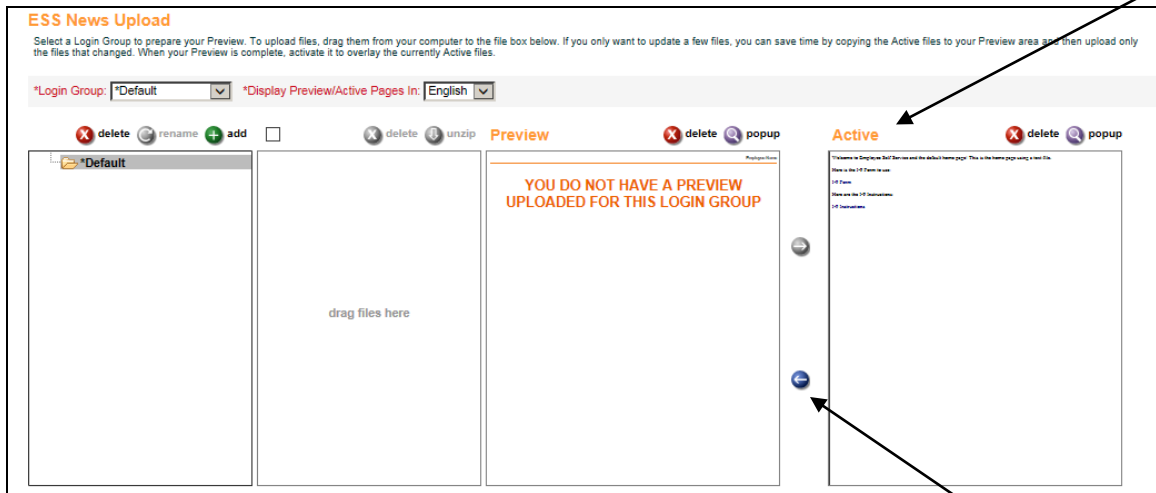
Once the files have been dragged into the box, you can select one or more files using the select boxes to delete or unzip them. Unzipping the files loads them from the folder the zip file is located. If the zip file was only needed to upload files, you can delete the zip file afterwards.

The Preview box will display the Employee Self Service home page. If you want to get a better view of the Preview or Active pages, click on the **popup** button above the corresponding view. This will display a popup window showing that page. If you leave the popups open when you upload additional files, they will update automatically. Deleting the Preview or Active pages will remove the associated Login Group folder and all of its contents.



When you are done uploading your content to your Preview, you can activate it by clicking on the **Activate Preview** button between the Preview and Active views. This will only be active when there is a "ESSNews.htm" file in your top Login Group folder.

When you activate your preview, all of the files for that Login Group are moved to the Active folder and are removed from your Preview.



You can copy the active files back to your Preview folder at any time by clicking on the **Copy Active To Preview** button between the Preview and Active views. Be careful as this will remove all the contents in your Preview for the selected Login Group and replace them with the Active files.

If you are planning to support Spanish content, you will need to create and upload a file called "ESSNews-ES.htm" into your Login Group folder. You can then select "Spanish" from the Language pull down to see the current Spanish Preview and Active pages.

Note that when you Activate a Preview, all of the contents in the Login Group folder and subfolders are uploaded, including both the English and Spanish versions. If you have already loaded files in English and activated the page, and then later wish to upload Spanish files, click on **Copy Active to Preview**. Drag the Spanish file(s) into the system. You may then preview both the English and Spanish versions by selecting the corresponding language. When you are ready to activate the preview(s), click on the **Activate Preview** button. This will activate both the English and Spanish pages.