ProService HAWAII
HR that powers your business

## *Online Self Service*

# Manager Guide

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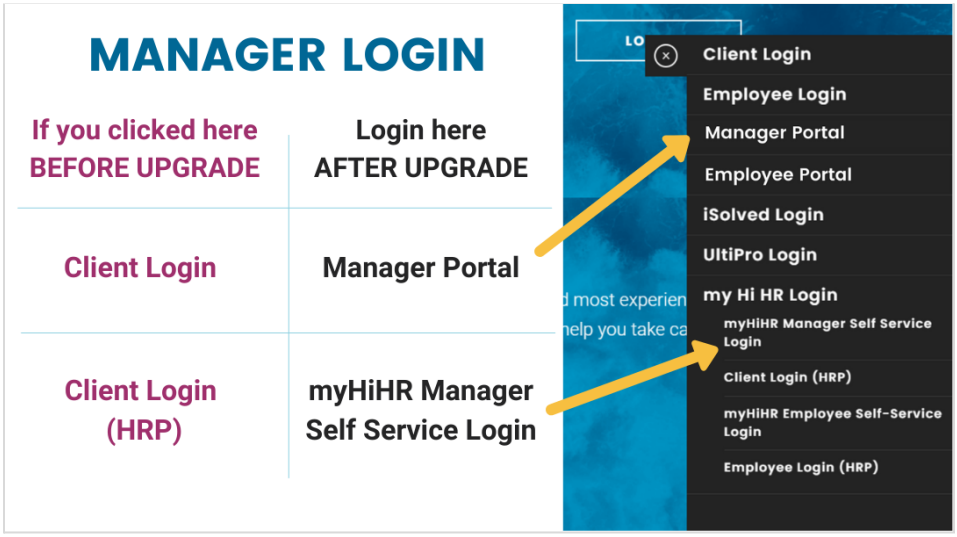
# Accessing Online Manager Self Services

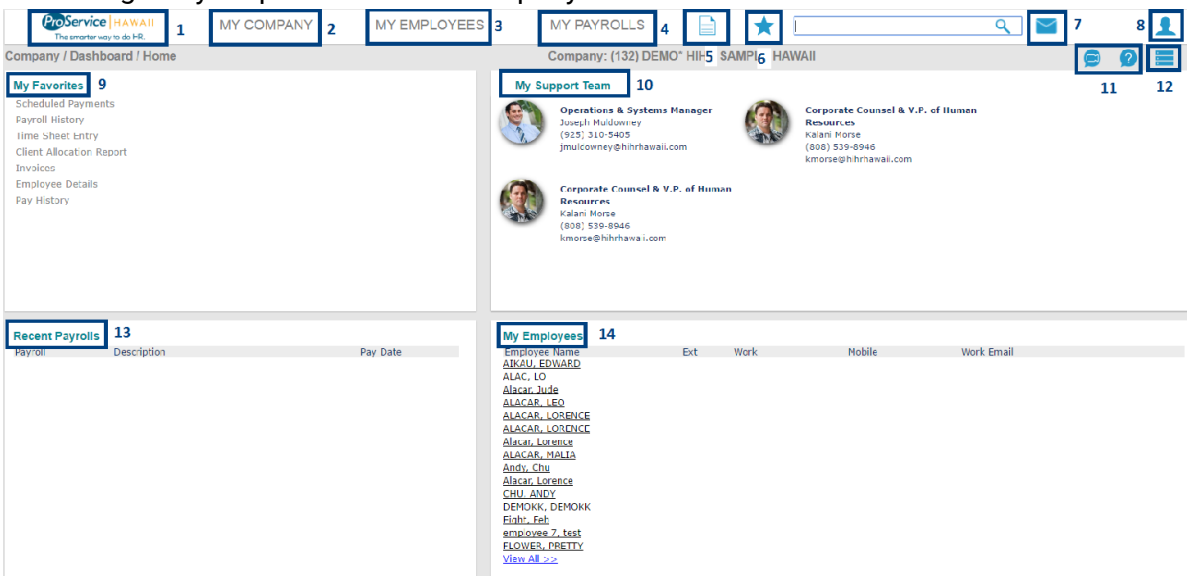
1. Go to [www.proservice.com](http://www.proservice.com).
2. From the upper right corner, click on **Login**.
3. Select the menu you should use after your upgrade **based on the chart** below.
4. A **login screen** will appear. If you have previously registered for an account, enter your **Username** and **Password**. If you have not created an account, click **Register** to create one.




The page will redirect you to this login screen.

# Getting Around - Dashboard

Dashboard gives you quick access to company information and relevant features.

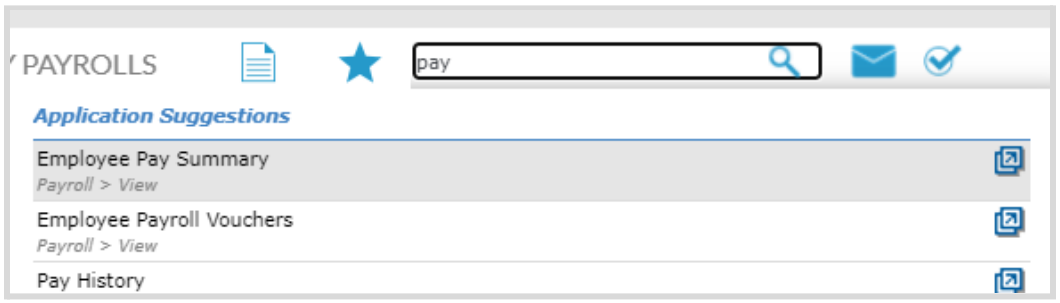



| Dashboard Item | Description |
|---|---|
| 1. Homepage | Clicking this logo brings you back to the homepage. |
| 2. My Company | A list of features related to your company. |
| 3. My Employees | A list of your employees related features. |
| 4. My Payrolls | This tab houses all actions regarding Payroll. |
| 5. Reports | This button will bring up a list of reports you can run. |
| 6. View Favorites | Clicking on this star in any view will show your favorites. |
| 7. Messages | All systems notifications for you to read are shown here. |
| 8. Password Change | Click on this icon to change your password or to sign out. |
| 9. My Favorites | You can set forms as favorites, features that you access frequently. These are listed on the Dashboard when and you can also access them from the Favorites menu. |
| 10. View Your Support Team | This lists your ProService client support team's contact information. |
| 11. Help | Video tutorials or help material can be viewed here. |
| 12. Action Menu/Bar | Allows a list of actions for the current screen. |
| 13. Recent Payrolls | Lists all of the latest payrolls and can be clicked to view individual payroll details. |
| 14. My Employees | Can be clicked to see employee information. |

## Search Bar

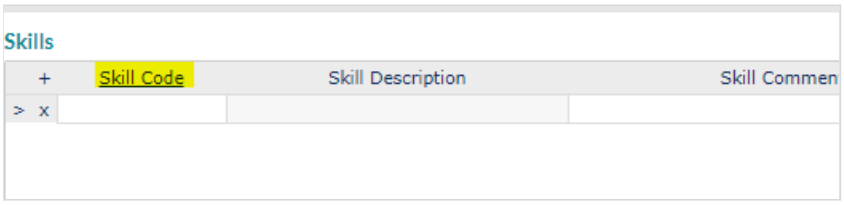
When searching in the toolbar, type in a part of a word and it will bring up the different functions and different reports that are associated with the word. You can either start typing to do a broad search, or you can narrow the search using an initial letter followed by a colon:

A: - Application Search (Features/Forms)
E: - Employee Search
R: - Report Search

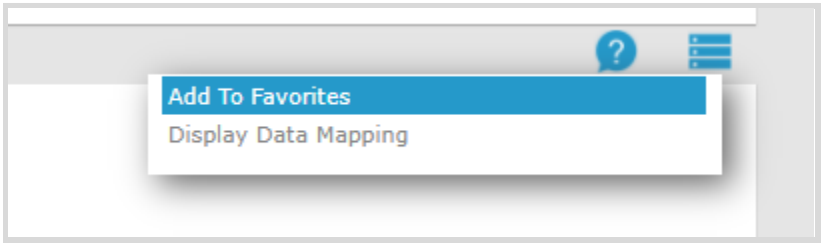



## General Navigation

Any underlined text is clickable and indicates action on the page, often opening a list of selections.




To add a page or report to your favorites, click on the action menu and click **Add To Favorites**.

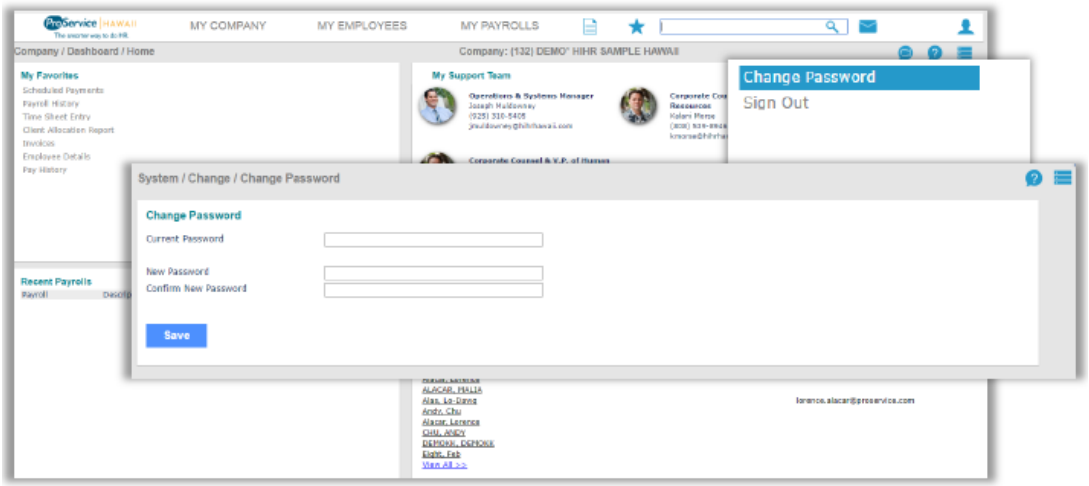


# Change Password

First time signing in? First time users should change their ProService issued password.

Best Practice Tip: Users are encouraged to change their passwords every six (6) weeks.

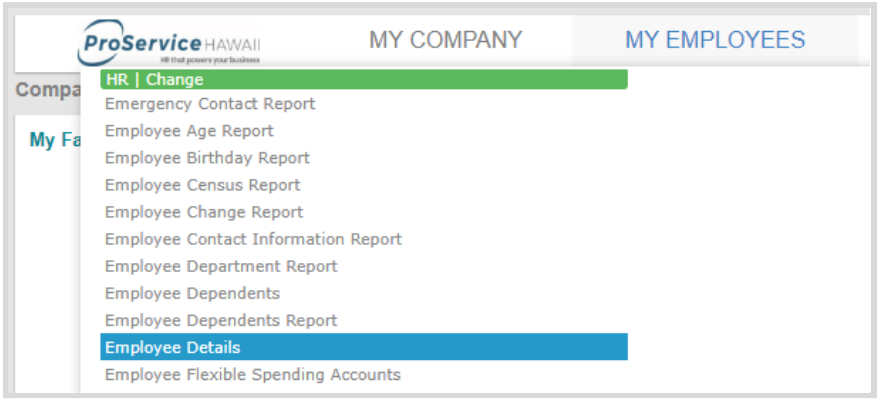
1. Enter your **Current Password**.
2. Enter your **New Password**. The system validates the password; if it does not pass the validation. The system will inform you what you need to do to create a valid password.
3. Re-enter your password in **the Confirm New Password** field.
4. Click **Save**, the next time you logon, use your new password.



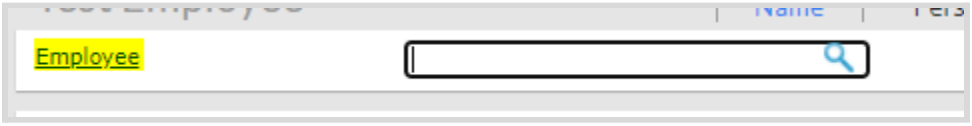
# View Employee's Profile

Obtaining detailed information about an employee is easy to do from The Dashboard.

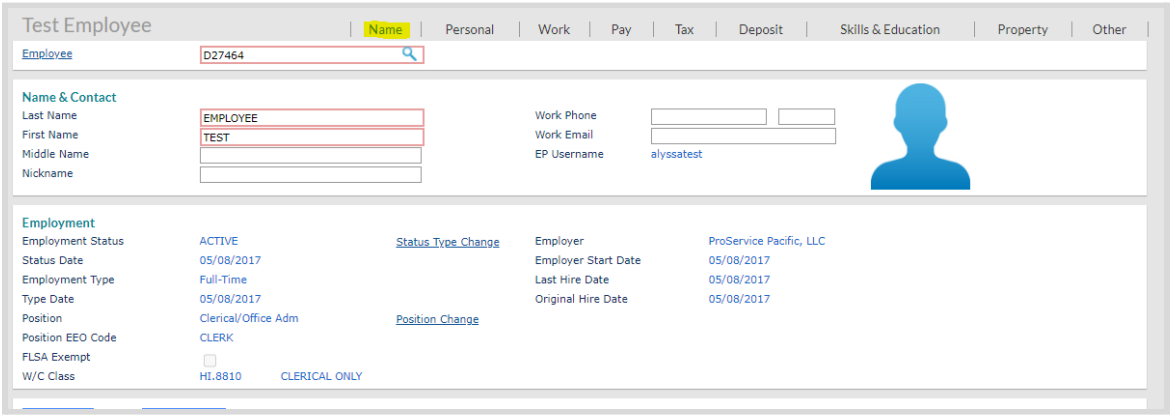
1. First, click on the **My Employees** tab then select the **Employee Details** bar.



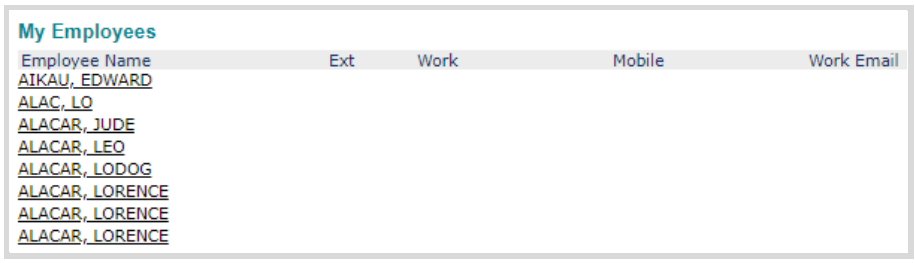

2. Click on **Employee** in the top left section of the screen and a list of all employees will appear.




3. Click on the desired employee to view the individual's personal profile. The tabs across the top will contain data specific to that area.

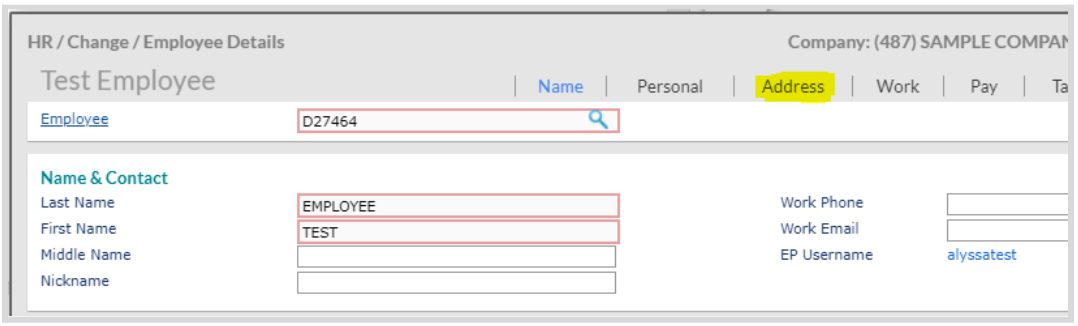



4. An alternative way is to use the bottom right quadrant on your home screen. It lists all of your active employees only. Click on any employee and it will also open their Employee Details page.

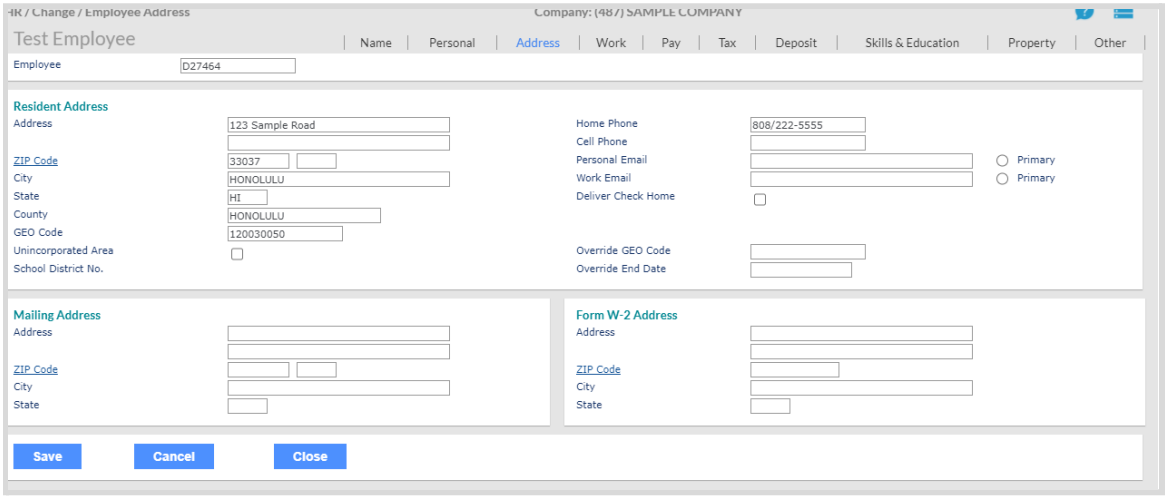



# Changing an Employee Address

1. From the employee profile, click Address.

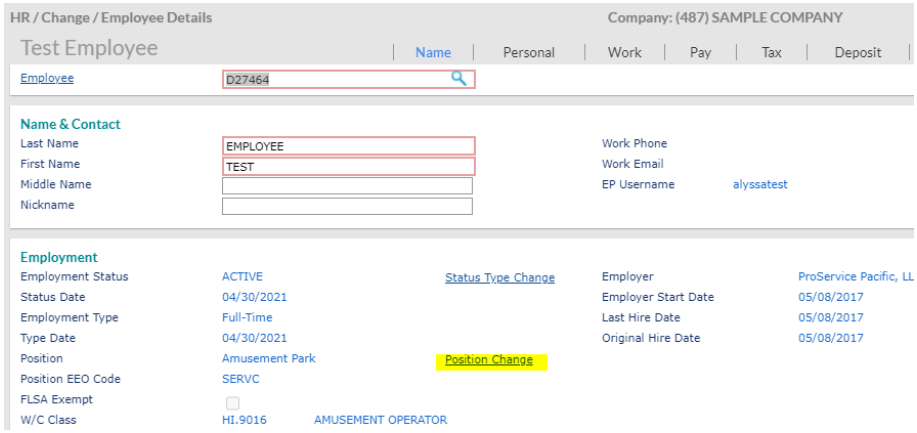



2. Type in the address information that needs to be updated and click **Save.**



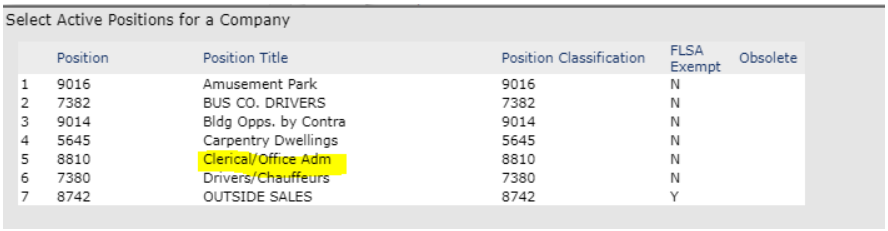
# Employee Position Change

1. From the employee profile, **Name** tab, click **Position Change**.

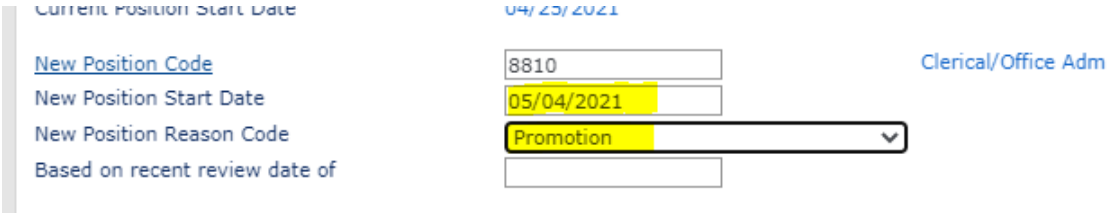



2. Click on the **New Position Code** link.

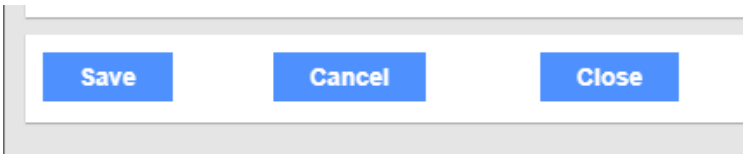
3. Select the new position from the pop up window.




4. Enter the **Start Date** and **Reason Code**.



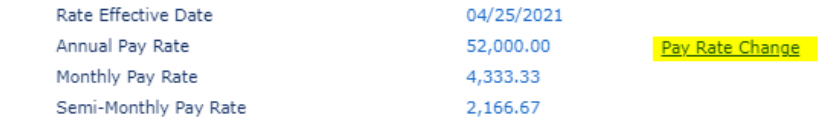

5. Click **Save**

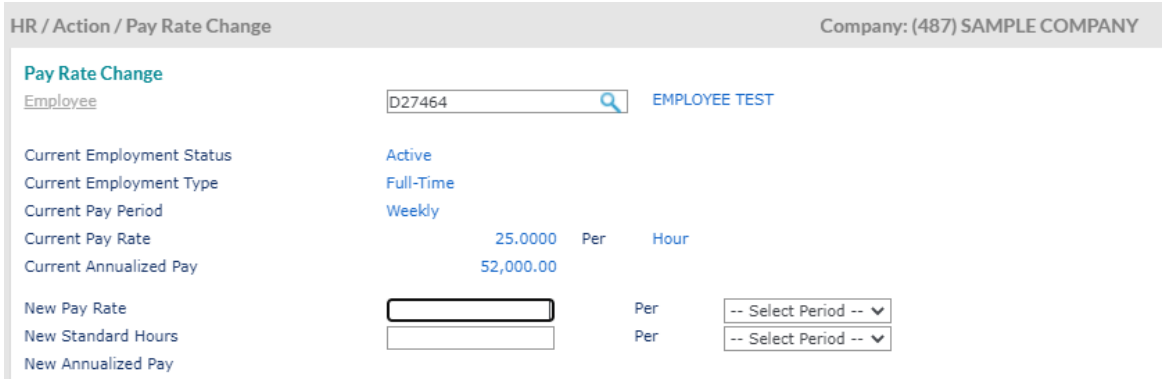


# Other Employee Changes

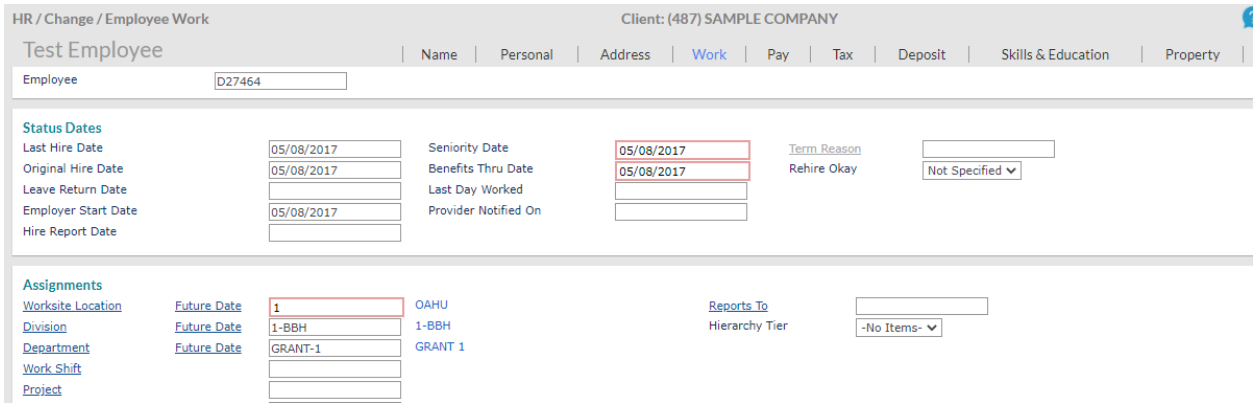
Depending on your role, you may have access to change other information for employees on other tabs.

- **Pay Tab**: Click on **Pay Rate Change** to update an employees pay.

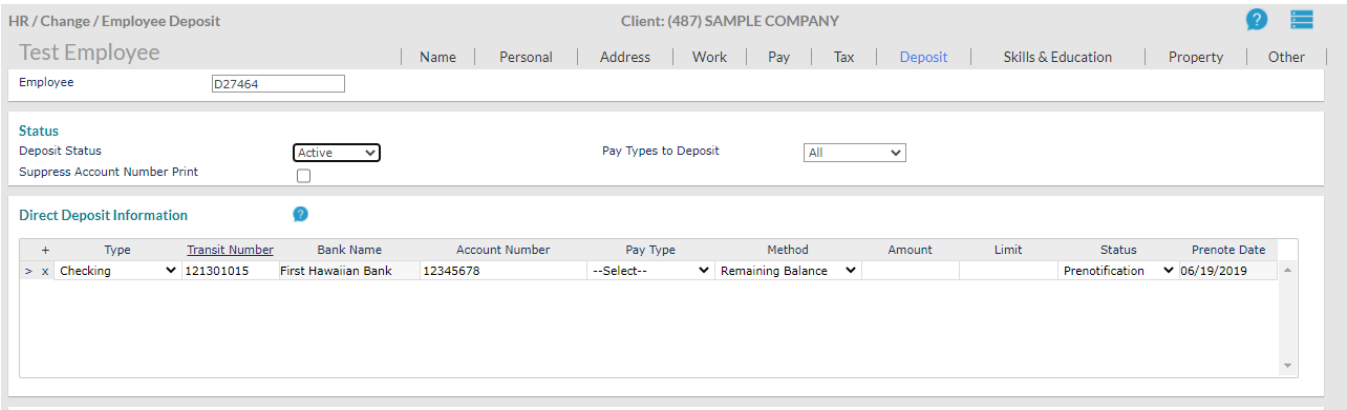


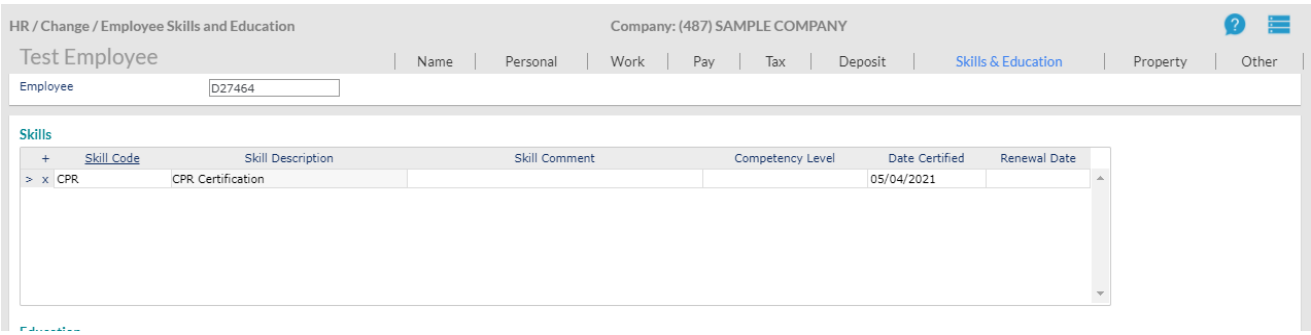

- **Work Tab:** Update an employee's Department, Division or Project



- **Deposit Tab**: Add, Delete or update an employee's direct deposit account




- **Skills & Education and Property Tabs**: Track important dates for employees or company property assigned to an employee.




- **Employee Documents**: An electronic filing cabinet for your digital employee documents. Access this from the **Action Menu** by clicking on and selecting **Documents.**

HR / Change / Employee Documents
Client: (487) SAMPLE COMPANY
Employee Documents
Document Name
Notes
Date Attached
ESS
DemoResume.pdf
04/22/2021
Load a Document
Close

# Documents & Forms

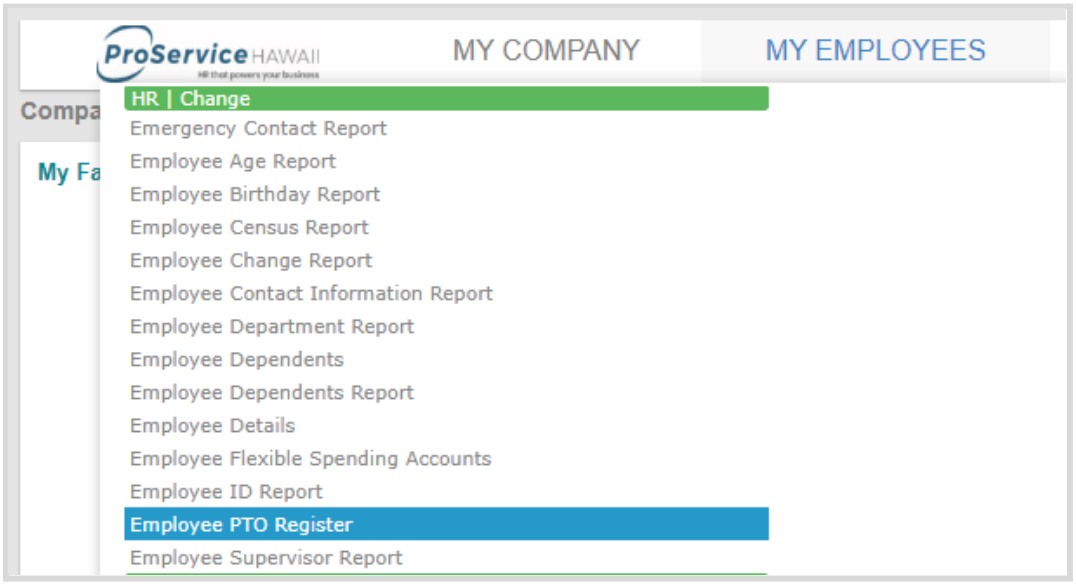
Depending on your access, there are different areas to access documents.

Under the **MY COMPANY** menu, **Clients Forms** provide access to change forms, safety forms and more. These also contain New Hire Forms. Forms will launch in a new window.

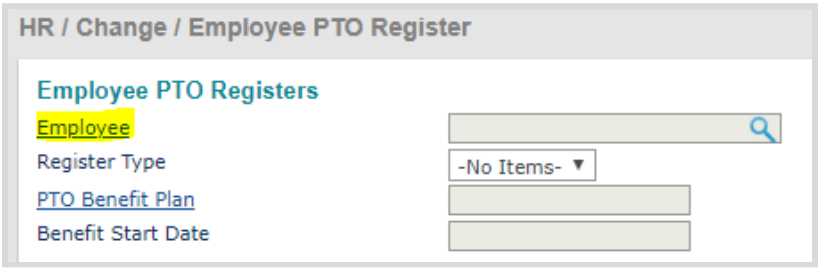
You may only have access to New Hire Forms, and these can be found under the **Client Forms - New Hire**.

# View Paid Time Off (PTO)

1. Click on the **My Employees** tab, then select **Employee PTO Register**, listed on the HR | Change dropdown




2. Click on **Employee** in the top left section of the screen and a list of all employees will appear




3. Choose the employee to view PTO information
4. Click on **Register Type** to choose the type of leave

# View Employee Benefits

1. Click on the **My Employees** tab, then select **Employee Benefit Overview**, listed on the HR | View dropdown

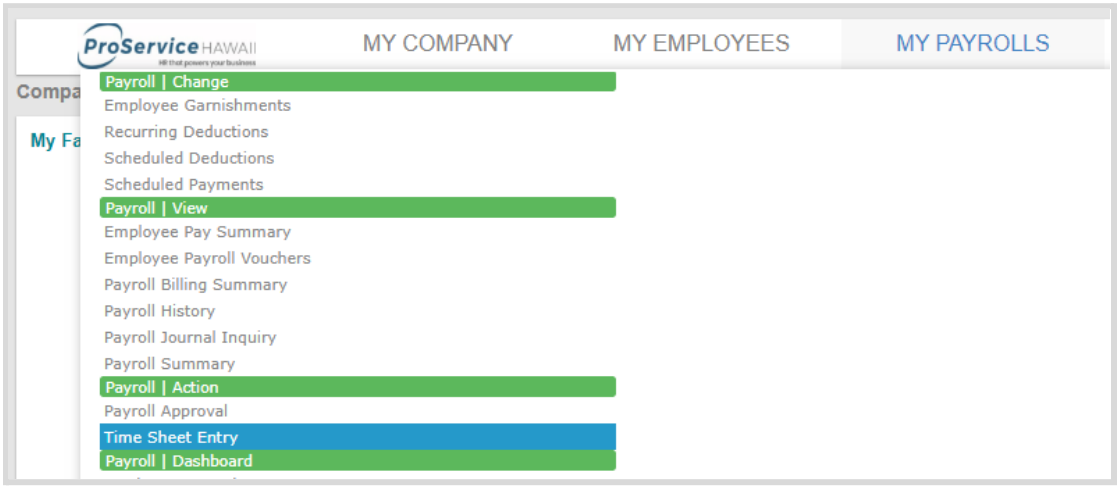
2. Select Employee ID in the top left section of the screen and a list of all employees will appear

3. Choose the employee to view their benefits overview

# Time Entry

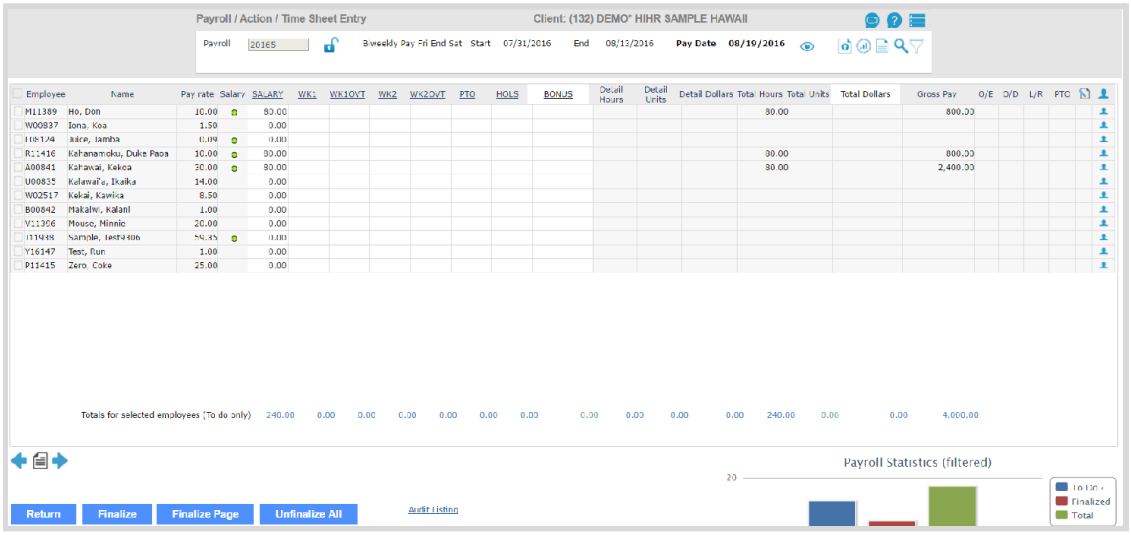
See the **Detail Guide to Time Sheet Entry** for more detailed information on time entry.

1. Click on **My Payrolls**, then select **Time Sheet Entry** under Payroll | Action



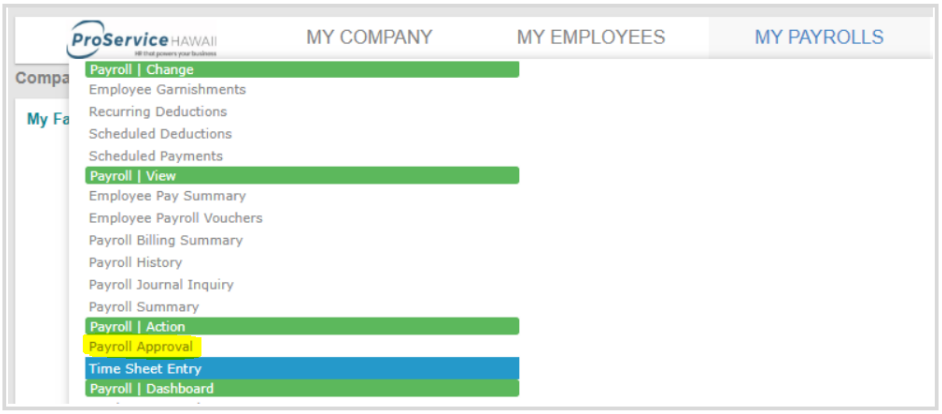

2. Click on the **Payroll number** to enter the timesheet as shown below:

3. Enter your time and once completed, click on **Finalize**.

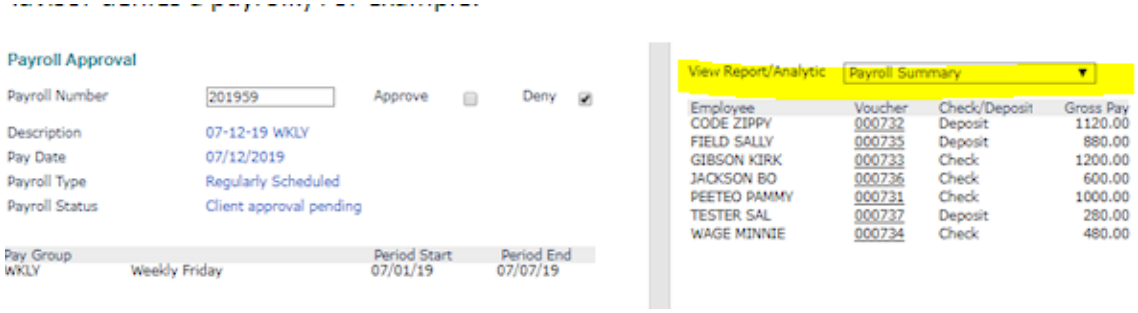


# Payroll Approval

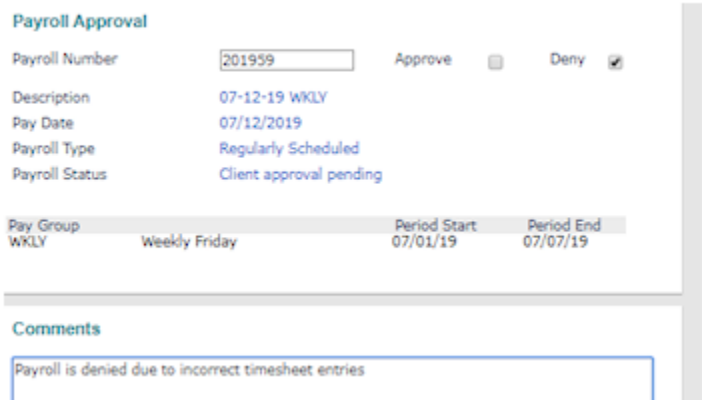
1. Once you receive the approval notification, click on **My Payrolls**, then select **Payroll Approval** under Payroll | Action



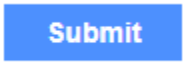

2. Reports are available to review on the right side of the screen.




3. If the payroll is correct, click **Approve**. If the payroll is incorrect, click **Deny** and enter comments noting the issues on the payroll.

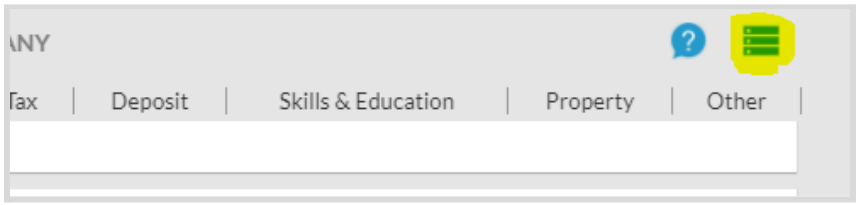



4. Once finished, click **Submit**.

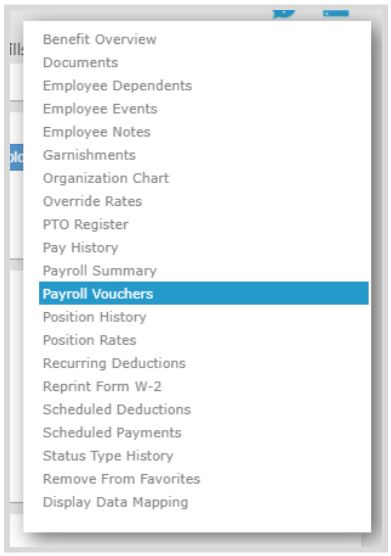


# Print Employee Paycheck Stub

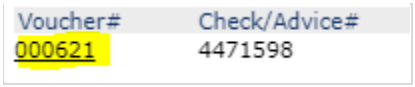
1. Select the employee you would like to print a stub for from **My Employees** on your homepage or by searching for the employee in your search bar.
2. In the employee record, click  on the Action Menu.



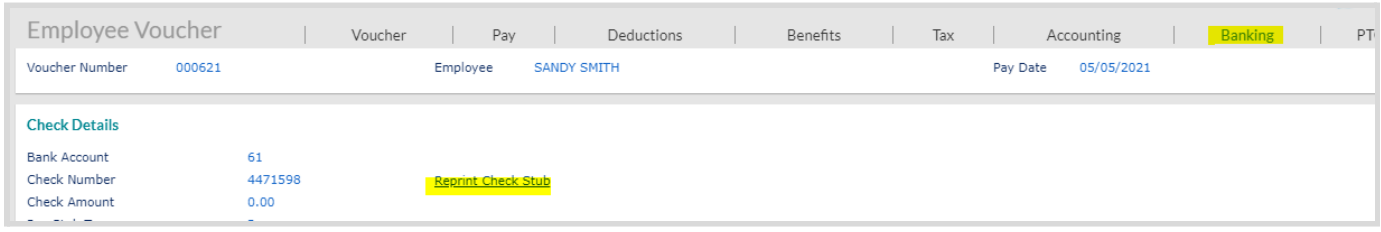

3. Select **Payroll Vouchers**.




4. Click on the Voucher number.

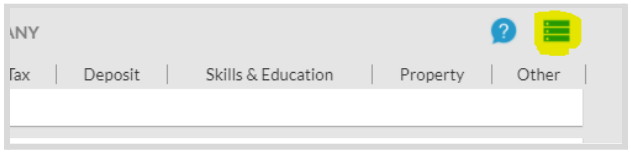



5. Click on the **Banking** Tab and then click **Reprint Check Stub**. The stub will save in PDF format to your computer.

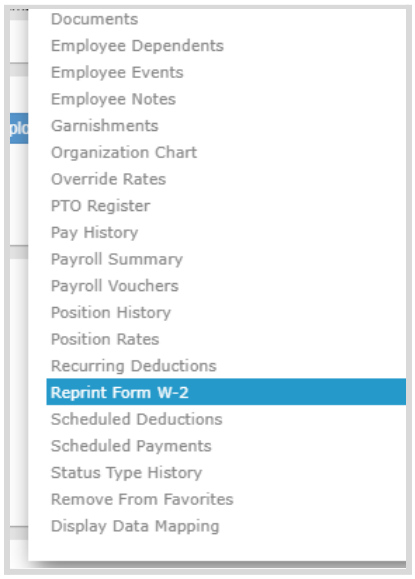


# Print Employee W-2

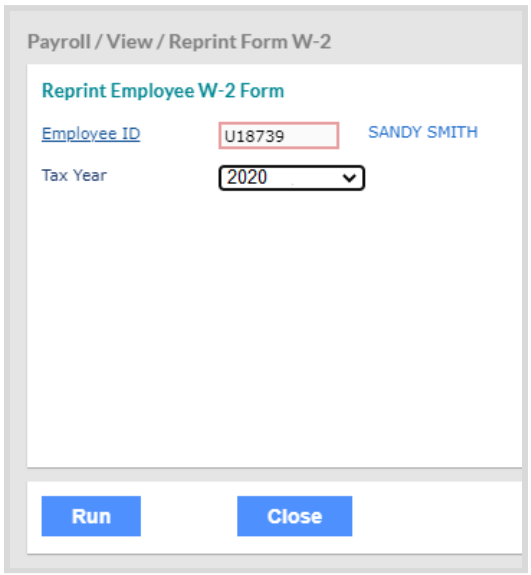
1. Select the employee you would like to print a stub for from **My Employees** on your homepage or by searching for the employee in your search bar.
2. In the employee record, click  on the Action Menu.




3. Select **Reprint Form W-2**.



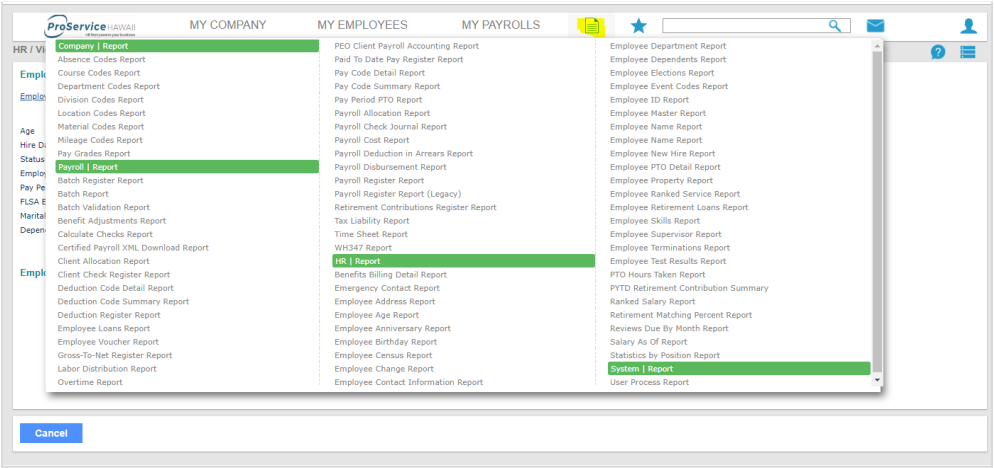

4. Select the Tax Year and click **Run**. The W-2 will save in PDF format to your computer.



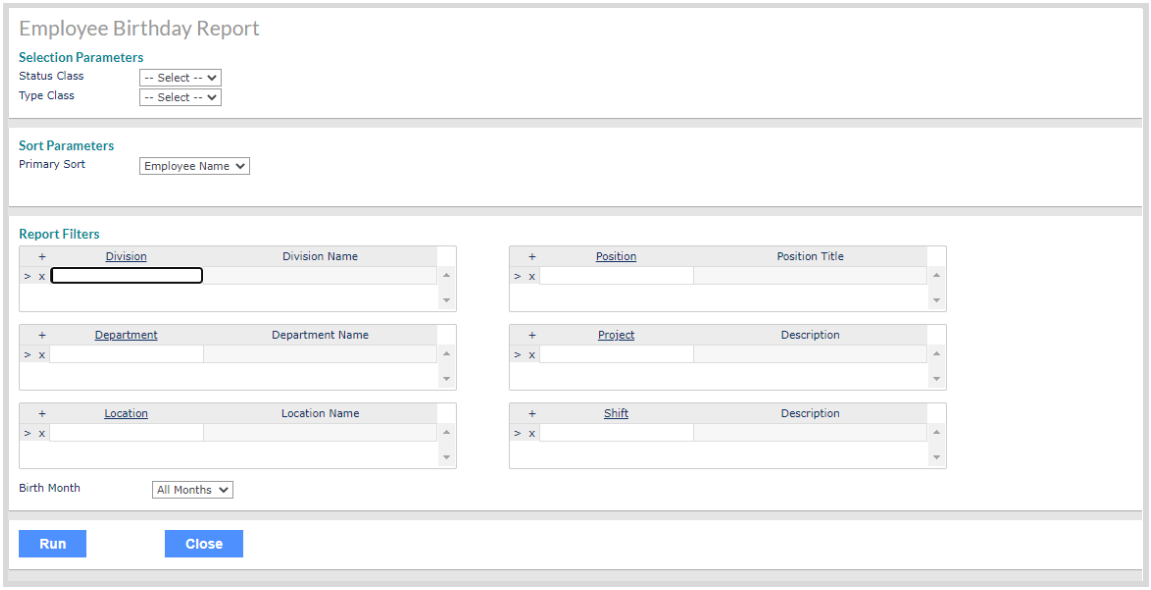
# Standard Payroll Reports List and How to Access Them

See the **Report Guide** for more detailed information on accessing and running reports.

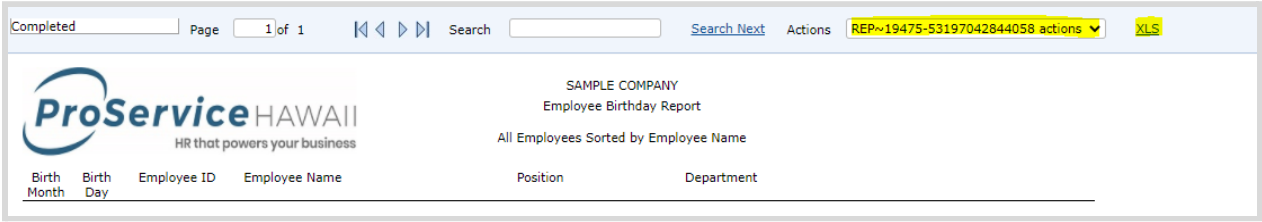
1. Click on the **Report Icon** highlighted in screenshot below
2. Click on the desired report from the dropdown




3. Filter the report by adjusting various pieces of information and click **Run** to generate report.

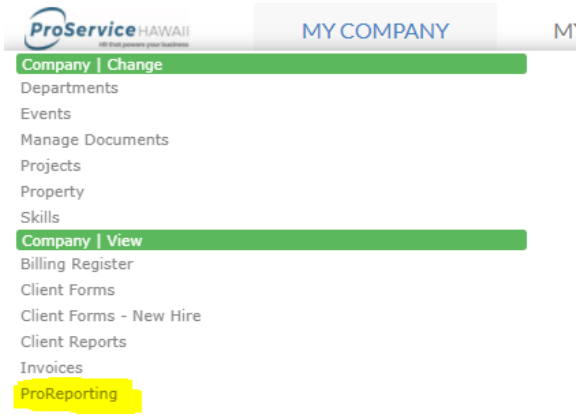



4. At the top right of the report, use the Action drop down to print or save the report in PDF or click XLS to download it to excel.

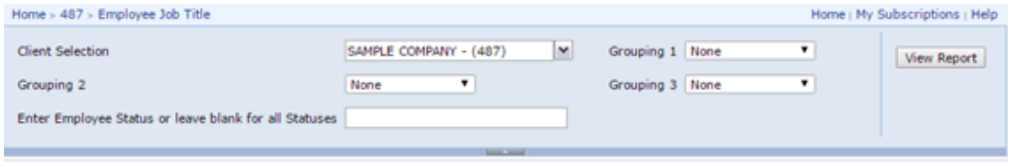


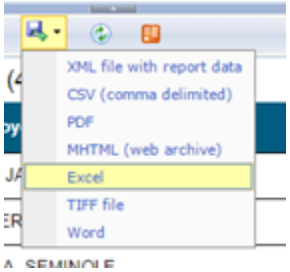
# ProReporting

1. ProReporting can be accessed by going to **My Company**, then selecting **ProReporting** under Company | View




2. To run a report, click on the report name. The report will launch. Reports may have the option to filter by parameters or group by cost centers. Select the options you want on the report and click the View Report button.




3. The report results will display on screen. If the report contains data on multiple pages, the arrow buttons can advance to the next screen.

4. Reports can be exported into multiple formats, including PDF, Excel and CSV. To save the report, click on the disk image and select the desired format.