

City of Portland SAP Employee Self Service Portal



This document created by: EBS Training Team, in consultation with BHR and OMF Central Payroll.

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What is CityLink? CityLink SAP ESS

Introduction

What is CityLink?

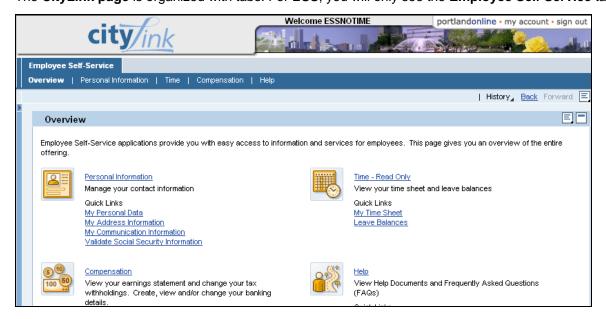
CityLink is the web "portal" or "window" that we use to view our personal information in SAP. This portal houses items such as the SAP Employee Self Service and SAP Manager Self Service.



To access the CityLink portal go to www.PortlandOnline.com/ESS and click on the SAP CityLink Portal link.

NOTE: If you are having difficulty accessing the Portland Online account, contact BTS Helpdesk: (503) 823-5199. Also, you must use Internet Explorer to access this page.

The CityLink page is organized with tabs. For ESS, you will only see the Employee Self Service tab.



CityLink SAP ESS What is ESS?

What is ESS?

ESS is the acronym for Employee Self Service. The ESS portal allows employees to view and update their personal information (such as personal address and emergency contact information), view and edit certain payroll information (such as W4s and Direct Deposit), and view the most recent time entry information entered into SAP.

NOTE: Some employees have the ability to edit their own time records through the ESS portal. If you are unsure if you have this ability, talk with your bureau timekeeper.

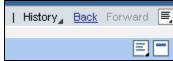
ESS is organized into five different sections: Overview, Personal Information, Time, Compensation and Help. The Overview page is the "landing page" or first page you will see when in ESS. To access each section, just click on the link in the blue header bar.



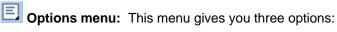
What is iView?

iView is the page you see when accessing information in the SAP ESS Portal. In addition to the tabs and navigational links already mentioned, iView has more navigational features listed below.

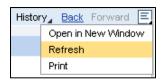
History link: This link will list the most recent pages you've viewed in the portal. This is a quick way to navigate around items you have just viewed.



Back and Forward links: These links will open the pages you just navigated from. Do not use the browser's back button to navigate to a previous page.



Open in New Window, Refresh and Print.



Collapse / Expand Tray: This will minimize the window you are currently viewing within the program.

SECURITY NOTE: *Be sure you log off of the portal when you are finished* to safeguard your personal information, including banking, address and communications information.

Overview Page CityLink SAP ESS

SAP ESS Pages

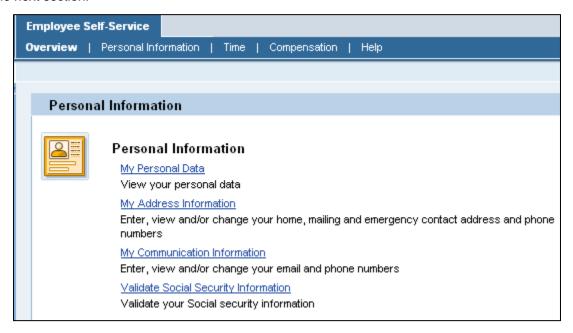
Overview Page

The Overview Page gives you quick links to information found throughout the ESS portal. This is typically the first page you will see when opening SAP ESS from the CityLink portal. Click on any blue link to access that page.



Personal Information Page

The personal information page is where you can view and edit your personal information. Some items, like your name and work information, cannot be changed. Other information, such as your address and emergency contact information can be edited directly in the portal. A description of each link can be found in the next section.

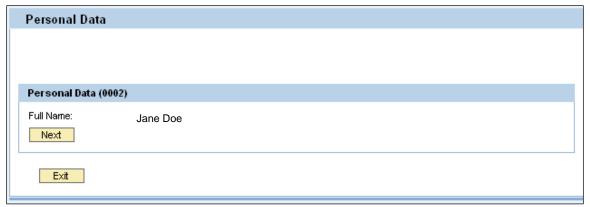


My Personal Data

The **My Personal Data** link will open a page to view your personal information stored in SAP. You can view your name and gender information. Just click on the link to open this section for viewing.

NOTE: If you need to make a change to the information stored in this section, you will need to contact your Operating Bureau Personnel Administrator (OBPA).

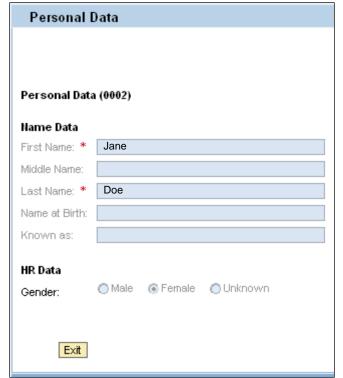




To go to the next page, select the Next button

Next

When you are finished viewing the information, select the Exit button



My Address Information

The **My Address Information** link will open a page to let you view and edit your personal address and your emergency contact information. The top of this page has a **progress bar** that tells you how many steps are required in this action.

NOTE: You must go through ALL the steps indicated to save your records.

STEP 1: Overview

- If the information needs to be changed, select the Edit button
- If you don't have any Emergency Contact information in the system, you will see the New Emergency Contact address button. Click this to add a new Emergency Contact to your HR record.
- If your emergency contact information is no longer valid, you can select the Delete button

 Delete to remove the record.



Permanent Mailing Address: This is the address the City will use to send information to you. Please be sure that you are able to receive mail at this location. Do not use either an external or internal City of Portland address, such as the Portland Building or Justice Center.

Emergency Contact Address: These fields are used to enter the name and contact information of the person who should be notified if there is an emergency at work. Your contact person's name is entered in the c/o field.





STEP 2: Editing Address Information

Click the **Edit button** to open the edit address page. This page looks identical for both the Permanent / Mailing address and the Emergency Contact address. In order to enter an address, you must enter information in all the fields with red asterisks.

NOTE: If you don't have an address for your emergency contact person, then enter N/A for any information you do not have.

Validity Dates: Addresses can be entered for a certain time period. Your options are to enter Valid as of Today, Valid as of a Future Date, or enter a Validity Period (only available on the Emergency Contact address). When you select the radio

button for the time period, you can type in a date or use the calendar button to select the date.

STEP 3: Review and Save

After you have finished editing the fields, select the Review button. This takes you to the next step, Review and Save.

- If the information is correct, select the Save button Save.
- If you need to edit information, select the Previous Step button Previous Step
- If you want to cancel and not save any of this information at all, select the Exit button Exit.

STEP 4: Confirmation

When you have successfully made changes to your address information, you will see the Confirmation screen.

Specifically, you are looking for the green checkmark, stating your changes were saved.



My Communication Information

The My Communication Information page is where you can edit your personal communication information like email and home phone numbers.

NOTE: You will not be able to edit your work email or work location. Please contact your Operating Bureau Personnel Administrator (OBPA) if you notice any errors on these fields.

STEP 1: Edit your information

Click the **Edit button** to make changes to the emails or phone numbers.

You can enter one personal email address and up to four (4) additional phone numbers.

- When you are finished with your edits, click
 the Review button Review
- If you don't want to make changes to the information, click the Cancel button Cancel

STEP 2: Save your Information

The review button will lock your edits and give you an opportunity to see if the changes are correct before saving the record.

- If your changes are correct, click the Save button Save.
- If you need to make additional edits, click the
 Cancel button Cancel .





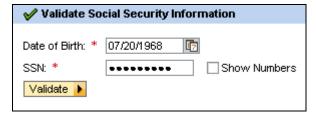
When you have successfully changed your records, you will see this message at the top of your screen:

Record Successfully Updated

▼ Telephone Number(s) updated

Validate Social Security Information

To preserve your privacy, your social security number does not appear anywhere on the ESS page. So in order to verify that your SSN and date of birth were entered correctly, click on the **Validate Social Security Information** link under the Personal Information page.





Date of Birth: Use the calendar button to locate your birthdate. It will auto-format the birthdate for you (for example, if it should be entered as MM/DD/YYYY or DD.MM.YYYY or some other format.)

SSN: Enter your social security number. You can enter it in either of the following formats: XXX-XXXX OR XXXXXXXX. *Note that the SSN will be not be visible when you enter it unless you check the box Show Numbers*. One advantage to not showing your numbers is that your SSN information will be kept private.

 If you enter the information correctly and it matches what is in your records, you will see green check boxes (see picture on right).



- If information is entered incorrectly, in the wrong format, or does not match the records in SAP, you will see an error message like one of these below:
 - Invalid date of birth
 - SSN entered below does not match with SAP records, try again or contact Central Payroll to update your information
 - Date of Birth entered below does not match with SAP records, try again or contact Central Payroll to update your information.

Time Page – Read Only

The SAP ESS Time Page is used to view and edit your time sheet and review your leave balances. However, this document will only explain the Read Only access available to all City employees. On this page are three links: My Time Sheet, My Time Statement, and Leave Balances.

NOTE: This document only explains the **Time Sheet Read Only access** available to all City employees. Some employees have the ability to enter time directly in ESS. If you are looking for training materials on **ESS Time Entry**, go to the SAP Training Intranet website (http://saprwd.city) and click on the ESS link.



My Time Sheet

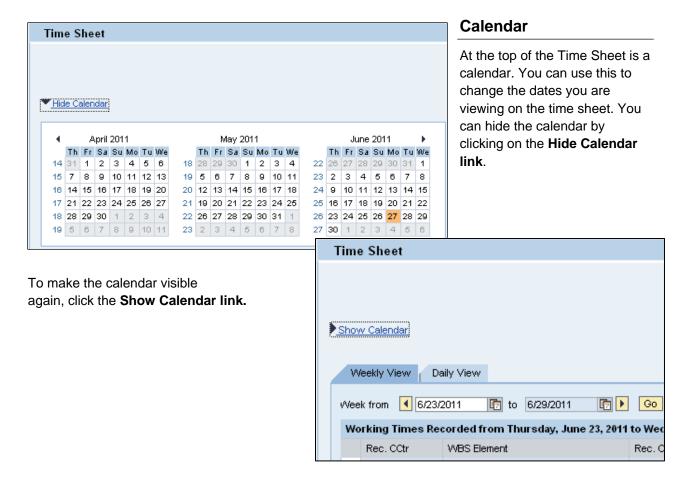
The **My Time Sheet** view shows you what time information has been entered into SAP up to the current date and time. There are a couple of important notes regarding time entry and its visibility to you.

If you are a negative-time entry employee, the only hours you will see on your time sheet are those which have been charged to a:

- Cost center that is different from your home cost center
- WBS Element or project
- Internal order
- OR hours which deviate from your normal work schedule, such as overtime, vacation and sick time.

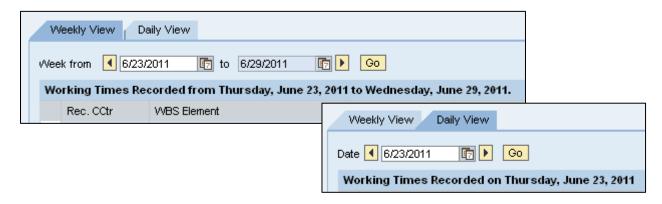
Also, it is important to note that **the SAP timekeeping process can be complex** depending on various factors including bargaining agreements and working shifts. Time is not always entered at the end of the day by your bureau timekeeper. It may take a day or two to process most time entries, and can sometimes take longer depending on the circumstances. Therefore, don't be alarmed if you check your time entry sheet and it appears that you are missing time, or that it is not entered correctly. Many times, adjustments based on labor contracts or complicated system rules require the timekeeper to record time

slightly different in order for the pay to reflect the correct amount. When in doubt, you can look back on a previous pay period where your time was paid correctly to see how it was entered. If you have further questions, check with your assigned bureau timekeeper for details.



Weekly / Daily View

You can change the view of your time sheet by selecting the Weekly or Daily View tabs.



Timekeeping Glossary: Across the top of your time sheet, you will see terms that might be new to you. Below is a list of the terms from the **Weekly View** of the time sheet, and their definitions. The **Daily View** of the time sheet doesn't have all these terms.

TERM	DEFINITION	
Rec. CCtr.	Receiving Cost Center – This is the cost center that labor is being charged to if work is being performed outside of your own cost center.	
WBS Element	WBS Elements – The project that labor is being charged to.	
Rec. Order	Receiving Internal Order – The internal order that labor is being charged to, where work is completed for another bureau.	
Receiving Func. Area	Receiving Functional Area – The functional area that the labor is being charged to; may or may not be your own functional area.	
Att./abs. type	Attendance / Absence Type – This is how your time is coded if you are working out-of-class, off schedule, taking time off, or are entering some other exception to your default information (i.e. charging your time to a different cost center).	
Valuation basis	Determines how a wage type is measured; for example, if you are working out-of-class and are to be paid \$2 higher than your current wage, the timekeeper might type a +2.00 in this field.	
Premium no. / ID	These are used for Police bureau only.	
Job	Number assigned to a position that identifies the type of work being performed.	
External Work Order	An order for planning and execution of work performed external to the bureau.	
Dates	The day of the week, and month date being viewed.	

My Time Statement

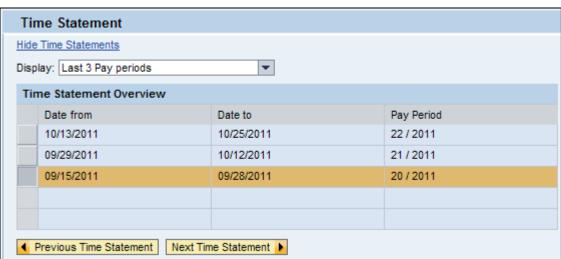
The My Time Statement view displays all evaluated time for a selected pay period. This report shows all timesheet entries entered for the pay period and wage types, including exceptions, upgrades and premiums.

Time evaluation is where the system calculates working times and absence times by comparing this information against local, state, and federal laws, and the City's collective bargaining agreement provisions governing how employees should be paid. Time evaluation runs nightly to determine planned working times and overtime, accrue and deduct quotas, and select wage types for payroll.

NOTE: Please refer to your Bureau timekeeper for any questions about the information in this report.

The default view on this page is to show the most recent pay period's time statement. To view more, click the **Display More Time Statements** link. You can then navigate up to 24 previous pay periods.





The Time Statement displays in a PDF file on the screen. You can use the **Previous Time Statement** and **Next Time Statement** buttons to navigate between available statements. **If you want to print the statement**, use the **PDF menu print** button to print a statement to your local printer.

Explanation of Report Items

Day		Time Pair	from	to	Hrs.	Р	Val.Bs
09/15/2011	TH	Sick Leave - Paid	06:30	15:00	8.00		
09/15/2011	TH	Sick Leave			8.00		
09/16/2011	FR	Hours Worked - OT Paid	15:00	17:00	2.00		
09/16/2011	FR	Regular Salary Pay			8.00		
09/16/2011	FR	Overtime 1.0			2.00		
09/16/2011	FR	Water Opts Mechanic .25			10.00		
09/17/2011	SA	Hours Worked - OT Comp	08:00	01:00	17.00		
09/17/2011	SA	Comp Holder 1.0			6.00		
09/17/2011	SA	Comp Holder 1.5			10.00		
09/17/2011	SA	Comp Holder 2.0			1.00		
09/17/2011	SA	Water Opts Mechanic .25			23.00		
09/18/2011	SU	Swing 0.84/hr			9.00		
09/19/2011	MO	Work out of Class	06:30	07:00	0.50		
09/19/2011	MO	Regular Salary Pay			1.00	+	5.00
09/19/2011	MO	Regular Salary Pay			7.00		
09/19/2011	MO	Water Opts Mechanic .25			8.00		
09/20/2011	TU	Regular Salary Pay			8.00		
09/20/2011	TU	Water Opts Mechanic .25			8.00		
09/21/2011	WE	Regular Salary Pay			8.00		
09/21/2011	WE	Water Opts Mechanic .25			8.00		
09/22/2011	TH	Regular Salary Pay			8.00		
09/22/2011	TH	Water Opts Mechanic .25			8.00		
09/23/2011	FR	Regular Salary Pay			8.00		
09/23/2011	FR	Water Opts Mechanic .25			8.00		
09/26/2011	MO	Regular Salary Pay			8.00		
09/26/2011	MO	Water Opts Mechanic .25			8.00		
09/27/2011	TU	Regular Salary Pay			8.00		
09/27/2011	TU	Water Opts Mechanic .25			8.00		
09/28/2011	WE	Regular Salary Pay			8.00		
09/28/2011	WE	Water Opts Mechanic .25			8.00		

Time Pair: Description of the time code entered on the time sheet or evaluated wage type.

White Lines: Actual clock times entered on the timesheet per absence / attendance type.

Blue Lines: The evaluated time that was completed in SAP. These reflect what the employee can expect to be paid.

Hours: Total number of hours entered per attendance type and total number of hours per evaluated wage type.

P: Shows if the employee is to receive a difference in base rate by displaying a positive (+) or negative (-) sign. Most of the time, this is a reflection of additional hours; however, some bureaus use this to enter negative amounts to deduct from the employee's base rate.

Val.Bs: The actual dollar rate to add or subtract from the base rate.

Total: The total of all blue lines on the time statement. Note that this is NOT the total hours worked, but an accumulation of time entries.

In the example above, the white lines show the actual clock time entries made (either by the bureau timekeeper or by the employee through ESS). The blue lines represent how the time was evaluated based on the rules written into the system. The total hours (205) reflect the total of all blue lines, or evaluated time.

Thursday, 9/15: 8 hours of sick leave was entered on the employee's time sheet. The white line reflects the manual entry and the blue line shows how the rules evaluated this time.

Friday, 9/16: The employee worked 2 hours of overtime, in addition to his standard 8 hour work day. A manual entry was made for the 2 hours of overtime (white line), and the 8 hours were automatically entered because the employee has a set schedule in the system (blue line). The evaluated time shows the 8 hours regular salary, the 2 hours overtime and 10 hours of upgrade for working with contracted equipment (all blue lines)

Time Transfer Specifications			
Begin	End	Time Transfer Type	Value/Hours
06/11/2009	12/31/9999	Water Operations Mechanic	1.00

Time Transfer Specifications: The Time Transfer Specifications can be found at the bottom of some time statements. This shows any switches, or time transfers, entered into the employee's time sheet for the pay period. You can view begin and end dates, a description (time transfer type), and value or hours for the active switch.

Value/Hours: Different switches have different requirements when added to a time sheet. Because of this, you may see different items appear in this column for the different switches on the time statement.

<u>Value</u>: This number indicates if the switch is turned on (1) or it may indicate the various dollar amounts the employee is eligible to receive.

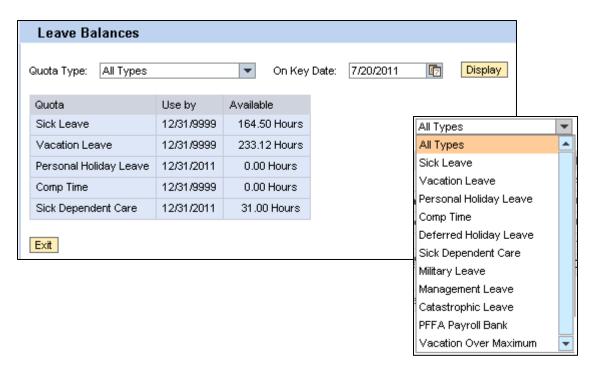
Hours: Indicates number of hours to be paid such as in Standby switches.

Leave Balances

The **Leave Balances** link, found on the Time page, displays any available leave, or quota balances available since the last Time Evaluation was run. This means that the balances you see on this page may not reflect actual time taken off as it may not have been entered into the current pay period yet. Use the **Quota Type drop down** to select a specific quota type, or leave it as the default to show All Types.

NOTE: Changing the Key Date will allow users to view historical information. If you notice any discrepancies in your quota balances, please consult your timekeeper.

The **Quota table** below lists the available quota type, when the hours must be used by and the total available hours. Below is also a list of all available quota types in the drop down menu.



Compensation Page

The **Compensation page** gives you access to view and edit items related to pay, tax withholding, and direct deposit.

NOTE: The Tax Withholding and Banking Information pages have specific rules or policies that must be followed to ensure that the changes you make are reflected when you expect them. Please pay close attention to those rules in each section.

Compensation



My Compensation

My Pay Statement

View your latest pay statement

My Tax Withholding (W-4)

Change and display your Tax Withholdings (W-4)

My Banking Information

Create, view, or change your banking details

My Pay Statement Delivery Method

View or change your pay statement delivery method (

General Compensation Information

Pay Practices

View Pay Practices document

Compensation Plan

View Compensation Plan document

NOTE: The **My Pay Statement Delivery Method** link will take you to the Portland Online BHR ESS page where you can view or change your pay statement delivery method (paper or electronic.)

Compensation Page CityLink SAP ESS

My Pay Statement

My Pay Statement, available from the Compensation page, allows you to view your pay statements in real time. This means that any changes to your hours in future pay periods will be reflected on prior pay statements. However, the dollar amount on the pay statement will not change.

For example, you worked 5 hours of overtime last pay period, but that was missed when your time was entered.

Actual hours worked: 45 Reported hours: 40

Hours were corrected during the next pay period and the additional pay shows as a retro payment on the 8/11/2011 earning statement. However, if you look back on your SAP ESS pay statement on 7/28/2011, your hours will be updated to reflect the actual 45 you worked, but the amount paid for that time period will not change.

NOTE: This is a "dynamic" view of what is currently in your SAP payroll records. If you need to see an exact copy of a prior pay statement, you will need to access that from the Portland Online BHR ESS page. If you have additional questions about your pay statement, please contact your timekeeper.



The Pay Statement displays in a PDF file on the screen. You can use the **Previous Pay Statement** and **Next Pay Statement** buttons to navigate between available statements.

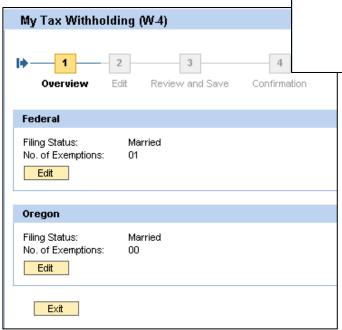
If you want to print the statement, use the PDF menu print button to print a statement to your local printer. The Exit button will take you back to the main Compensation page.

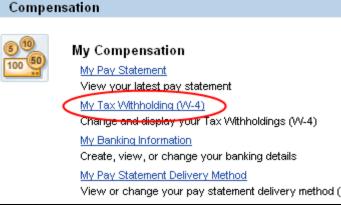
Another way to quickly navigate between pay statements is the **Show Overview link**. When you click on this, it will default to only show you the most recent pay statement. Use the **Display the Last** drop down menu to choose **All Available Statements** to get an overview of your statement history. Selecting a line will automatically display a PDF of that statement in the window below.

CityLink SAP ESS Compensation Page

My Tax Withholding (W-4)

My Tax Withholding allows you to edit your federal and state tax withholdings throughout the year. This link is available on the Compensation page.





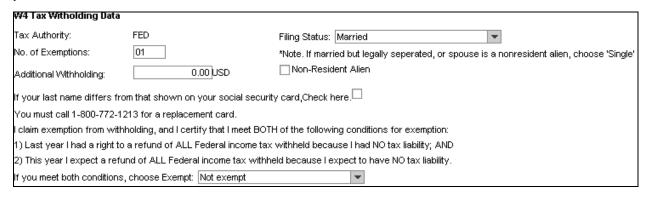
STEP 1: Overview

On this page, you can view what your current withholding status is. To make changes, click on the **Edit button** Edit .

NOTE: If you have an IRS lock letter in the system, you will not have the ability to edit your own W-4. Instead, you will receive an error message asking you to contact Central Payroll regarding changes.

STEP 2: Edit

When you click on Edit, you will see a page with your current information including your name, address and social security number. Under the **W4 Tax Withholding Data section**, you can make changes to your W-4.

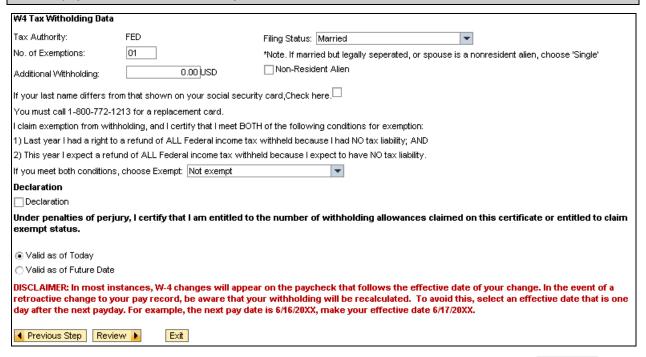


Compensation Page CityLink SAP ESS

Don't forget to check the **Declaration box** and **enter the date the information should be valid**. You can select "today" or enter a future date for the changes to be in effect.



NOTE: In most cases, W-4 changes will appear on the paycheck that follows the effective date of your change. In the event of a retroactive change to your pay record, be aware that your withholding will be recalculated. To avoid this, select an effective date that is one day after the next payday. For example, if the next pay date is 6/16/2011, make your effective date 6/17/2011.



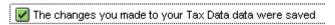
- When you have finished editing your W-4 information, select the Review button
- If you don't want to make any changes, select the Previous Step button Previous Step or the Exit button Exit.

STEP 3: Review and Save

Review the information you have entered. If it is correct, select the **Save button**

STEP 4: Confirmation

You must see this screen in order to successfully save your changes. Specifically, you are looking for the green check box that says "The changes you made to your Tax Data were saved."

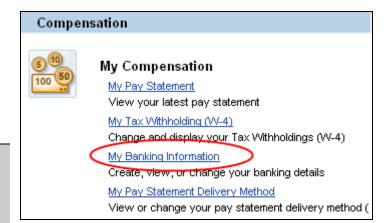


My Banking Information

When you click on the **My Banking Information** link, it takes you to a page where you can edit which bank accounts you automatically deposit money into for each paycheck.

NOTE: You are limited to four (4) banks for direct deposit. If you try to add more, you will get an error message.

More than 4 Bank transfers are not allowed



STEP 1: Overview

This screen provides an overview of your current deposit information. The **Main bank** is where the primary deposit will be made. **Other banks** are for ancillary funds to be deposited.

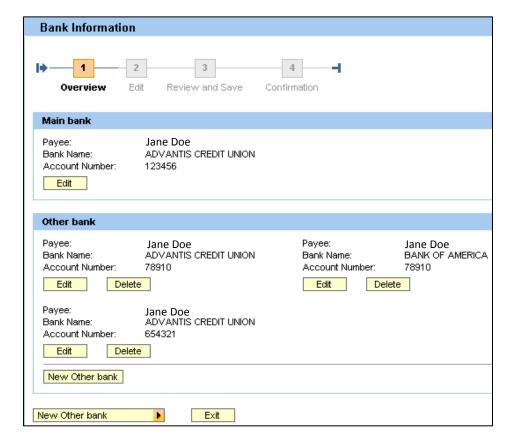
For example, in addition to your main bank, which is your checking account, you want to set up a \$50 deposit to a savings account, a \$300 deposit to a credit union, and a \$200 deposit to another bank. SAP will automatically deposit the amounts to your "other banks" first and deposit all remaining funds into your Main bank account.

 If you want to add a new bank, click the New Other bank button.

New Other bank

- If you want to edit information on an existing deposit, select the Edit button

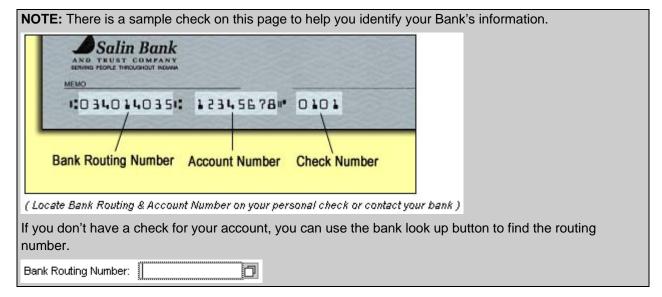
 Edit
- If you want to delete the bank information from your records, select the Delete button Delete



Compensation Page CityLink SAP ESS

STEP 2: Adding / Editing a Bank

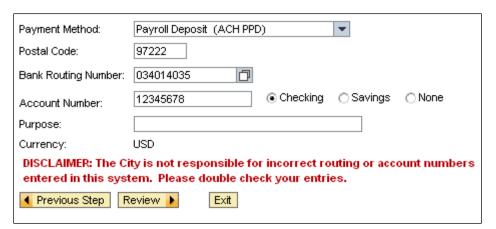
The Edit screen is similar for both adding and editing a bank. If you are editing your bank's information, then you will already see the Bank Routing Number and Account Number filled in.



Main Bank Information:

If you want to INITIATE direct deposit for your main bank, then complete the following fields:

- Payment Method: Payroll Deposit
- Postal Code: The postal code that is matches the address on the account.
- Bank Routing Number: 9 digit number that identifies the appropriate bank branch where account resides
- Account Number: The 8 digit number of the account you will be depositing money into
- Purpose: Free text field; used so you can add more information about this account.



If you want to STOP direct deposit for your main bank, then clear out all the fields (delete the account, routing number, etc) and select "none" next to the account number.

Payment Method:	-		
Postal Code:			
Bank Routing Number:			
Account Number:	Checking	○ Savings	None

Other Bank Information:

If you want to INITIATE direct deposit for an additional bank, then complete the same fields as mentioned above for the main bank.

In addition, you will need to complete ONE of the bottom two fields, indicating how much of your pay check you will be depositing into this account. You can either deposit a percent of the total pay OR set a default value.

Standard Percentage:	7
Default Value:	0.00

NOTE: If you choose to deposit money into additional banks, then the amount deposited into your main bank or given to you on your paycheck will be the remaining amount. For example, if your total pay is \$1500 and you have a secondary bank set up to deposit \$200 into, your main bank deposit (or primary paycheck) will be for only \$1300.

If you want to STOP direct deposit for an additional bank, then click the Delete button below the bank detail information. You will be asked to confirm the deletion of information, followed by a green checkmark and confirmation of the deletion.

Bank Account Effective Dates:

IMPORTANT NOTE: Bank information added, changed or deleted will not always be reflected immediately. For example, look at the following two pay periods:

Pay Period 1: 7/7/2011 - 7/20/2011 *Pay date: 7/28/2011
Pay Period 2: 7/21/2011 - 8/3/2011 *Pay date: 8/11/2011

You go in on 7/25/2011 and edit or remove one of your bank accounts. This will not appear on the 7/28 pay statement because the change is during the 7/21-8/3 pay period. Therefore, you will see it on the 8/11 pay statement.

STEP 3: Review and Save

When you have finished editing your bank account information, click the **Review button**. You will be taken to the Review and Save page where you can double check what you have entered and SAP will verify that the information was entered correctly before it saves.