Version Number	**1.0**
Effective Date	**October 15, 2019**
Process Owner	**HR Ops**
Applicability	**All Employees**

Revision History

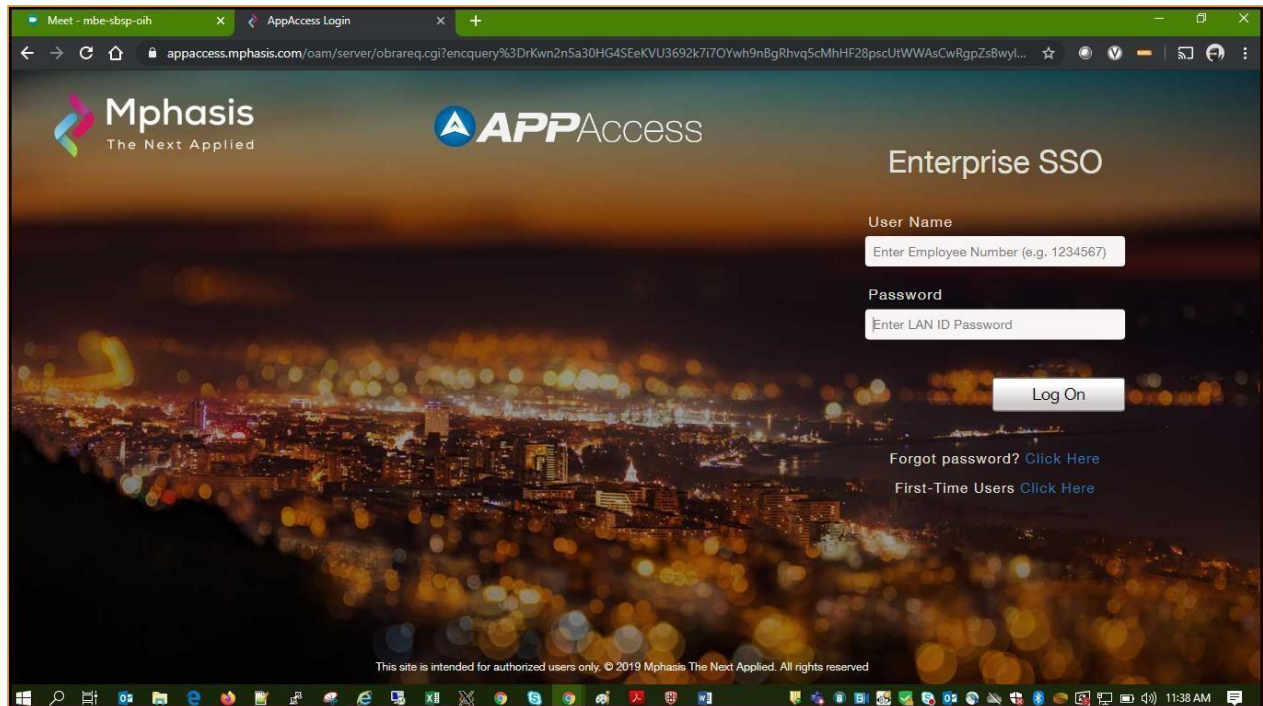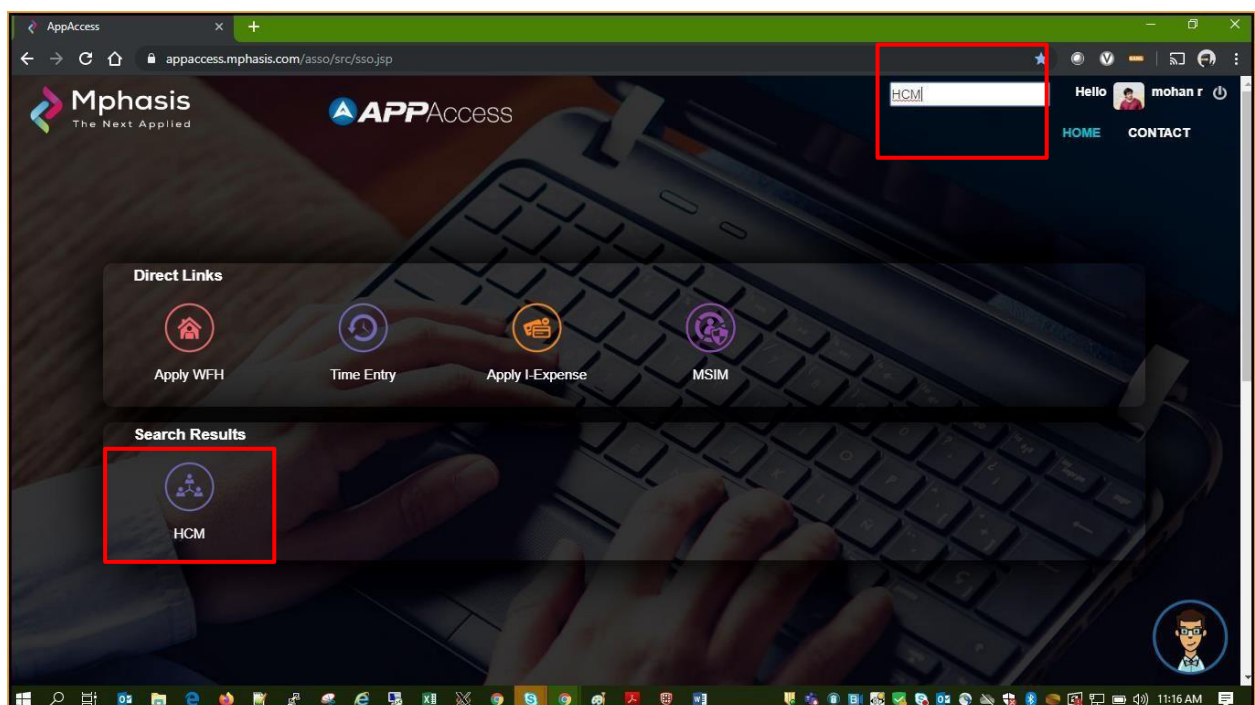| Serial No.	Version No.	Date of Change	LT2 Approver	Sections Affected	Changes in Brief

Contents

Contents

1. Accessing HCM

Login to AppAccess using your Employee ID and password using the below link.
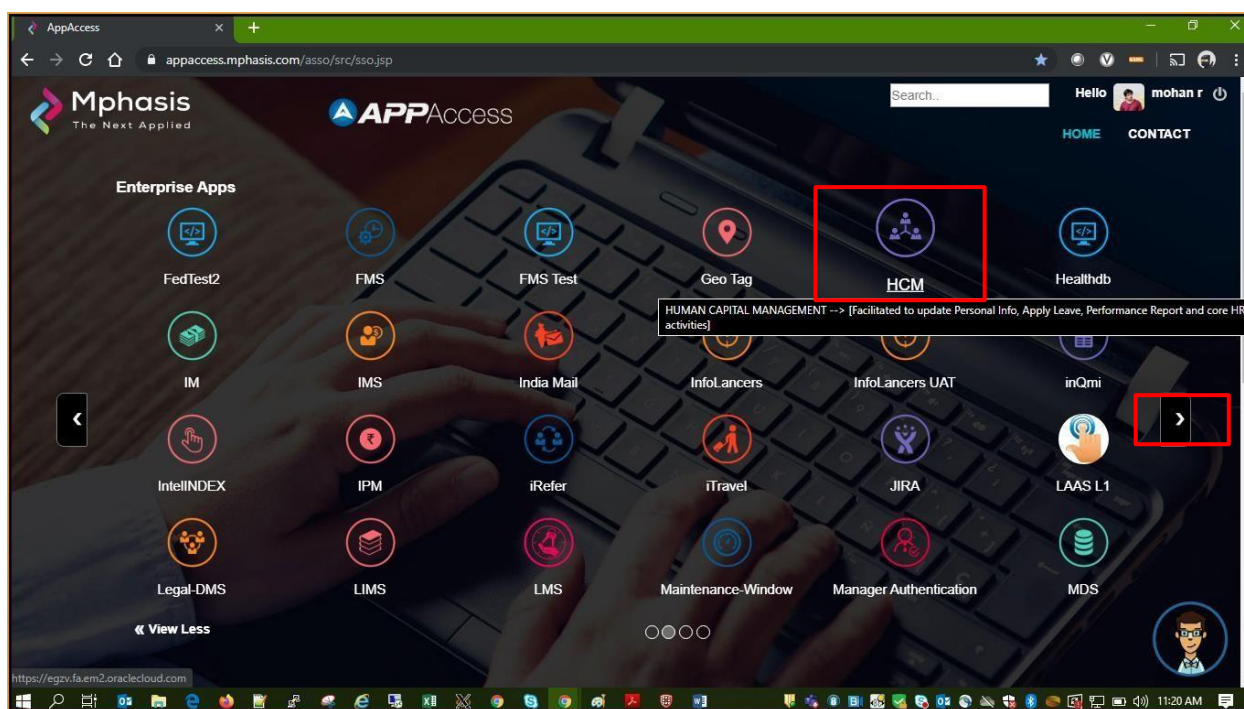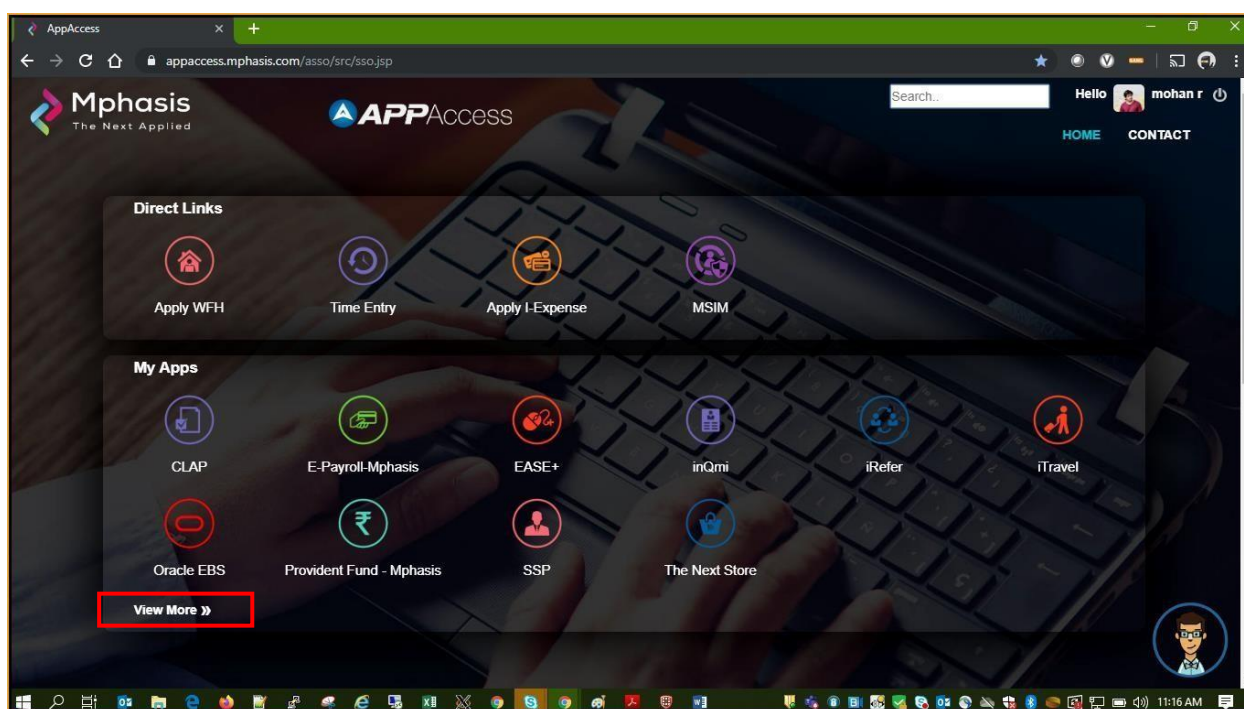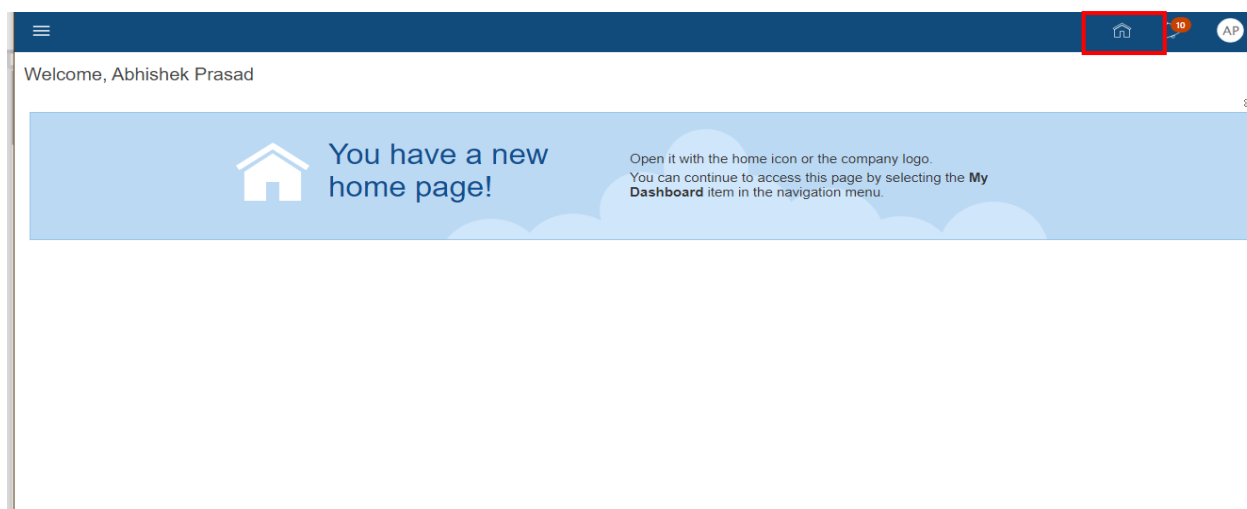https://appaccess.mphasis.com/

Once you login, you can type "HCM" in the Search bar to find the icon for HCM

You can click on the HCM icon in the AppAccess landing page or click "View More" and go to the next page, to find the HCM Icon.

Click on "Home" Icon in the welcome page.

The application helps the organization and its employees to transact seamlessly. The employees can manage wide range of activities like receipt of salary, goal management, performance evaluation, personal data, skill development and adherence to organizational policies. Similarly, organization can maintain employee data, manage compensation to employees, ensure performance management and other important activities for creating a transparent and efficient human resource management.

1.1 Getting Started

After successful login, the application leads to the home page, where employee can access different tasks.
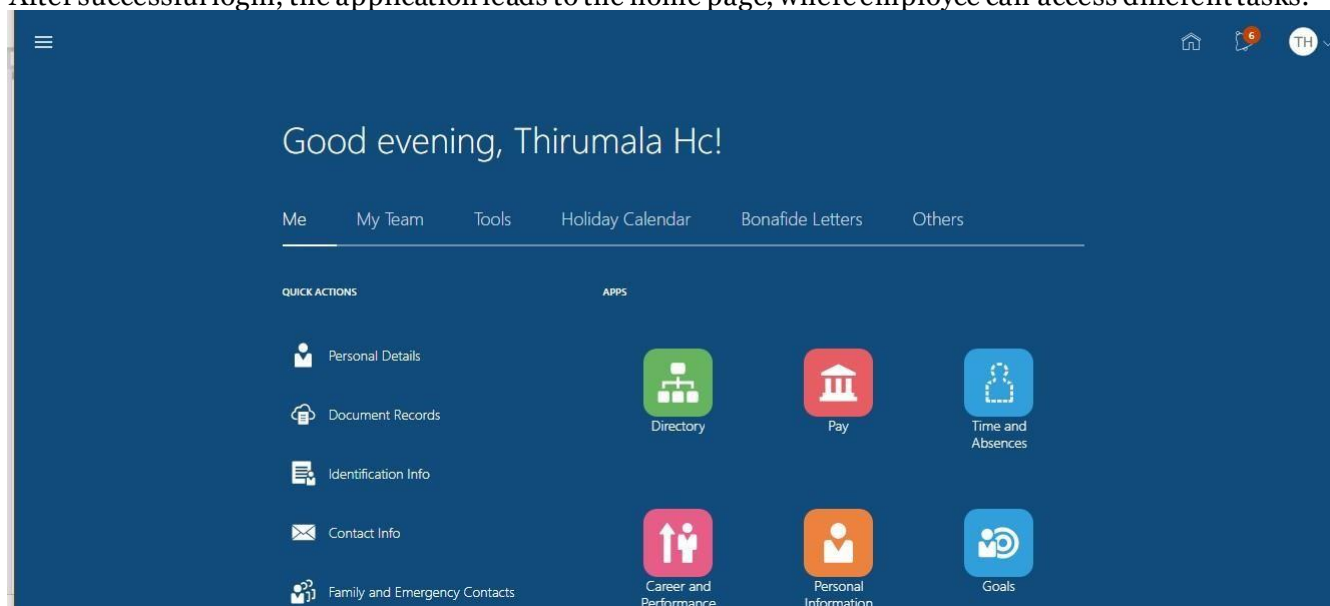
The home page offers the employee certain quick action links and access to different applications. The employee can navigate between the applications and return to the same page (home) by clicking on the home icon
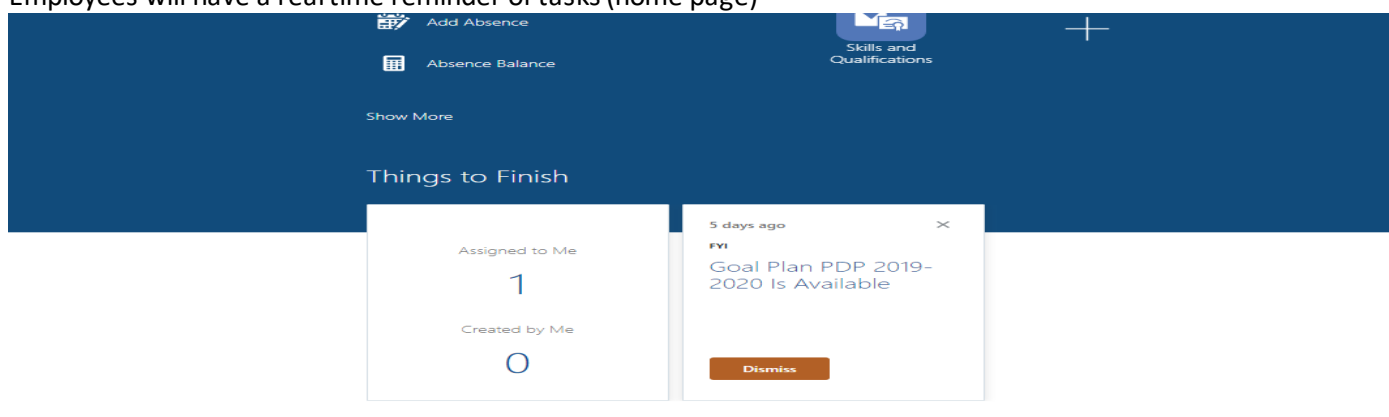
Home icon

The employee recieves all relevant communication in email and in the notification icon bar
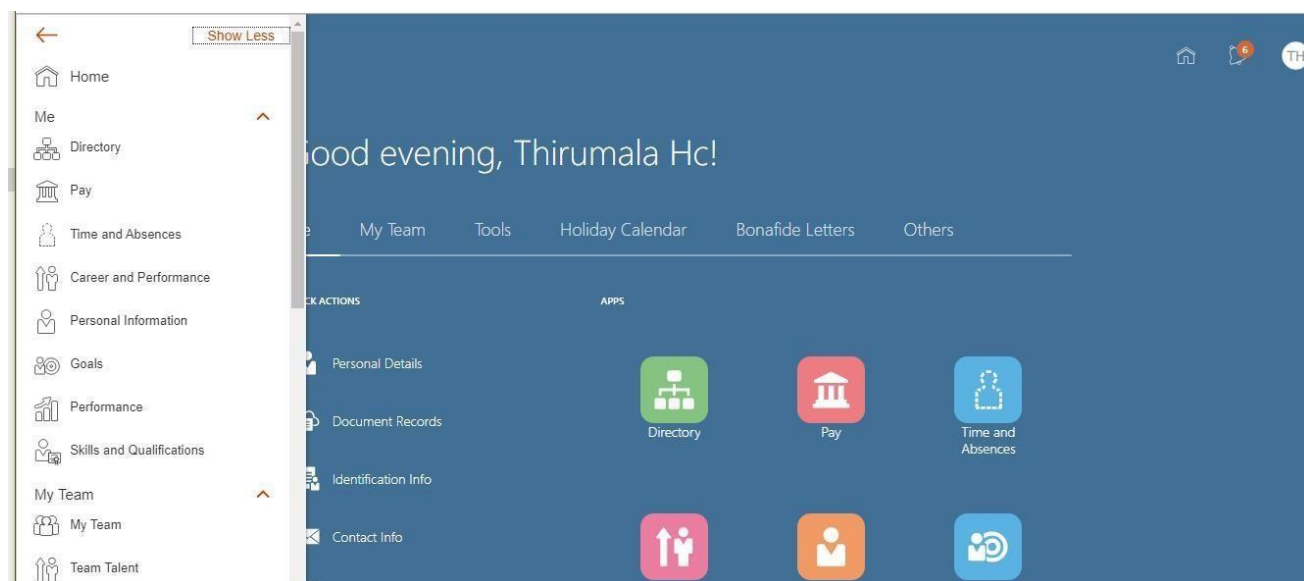
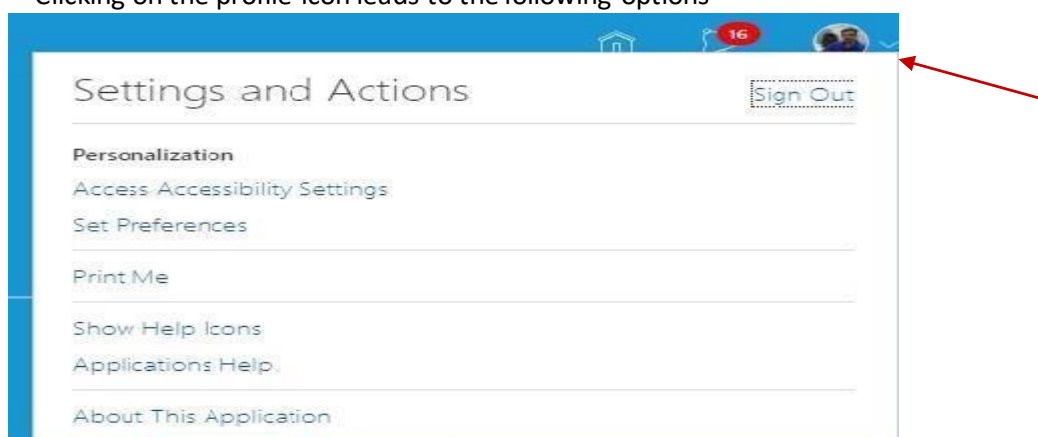Employees will have a real time reminder of tasks (home page)

Add Absence

Absence Balance

Skills and Qualifications

Show More

Things to Finish

Assigned to Me

1

Created by Me

O

5 days ago

FYI

Goal Plan PDP 2019-2020 Is Available

Dismiss

The icon present on the left top provides links to all the tabs available in the application. This helps in navigation when the user is not able to find the back button. It helps to navigate from one page to another page.

Click on the above icon leads to the following screen:

Show Less

Home

Me

Directory

Pay

Time and Absences

Career and Performance

Personal Information

Goals

Performance

Skills and Qualifications

My Team

My Team

Team Talent

ood evening, Thirumala Hc!

My Team   Tools   Holiday Calendar   Bonafide Letters   Others

CK ACTIONS   APPS

Personal Details

Document Records

Directory   Pay   Time and Absences

Identification Info

Contact Info

Clicking on the profile icon leads to the following options
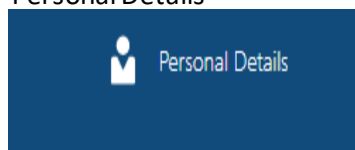

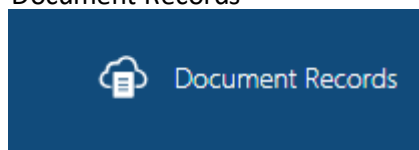Icons present in the home page under "Me" tab as Quick Action links.
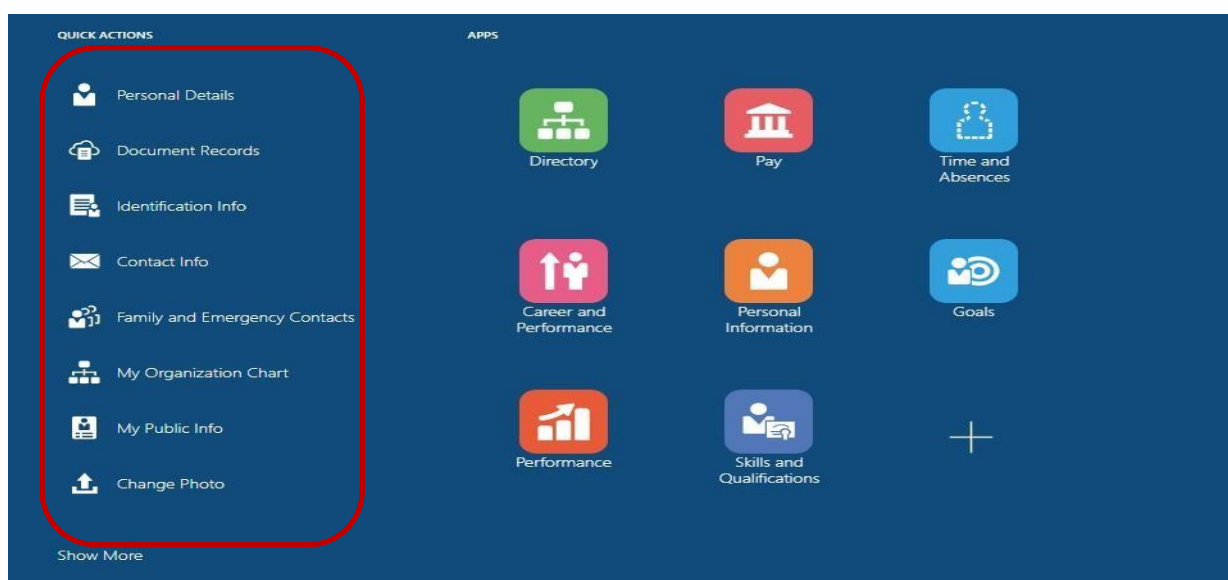
The above highlighted icons are explained in this manual. This is a shortcut link
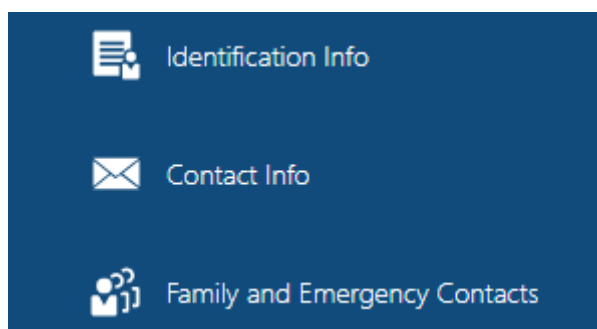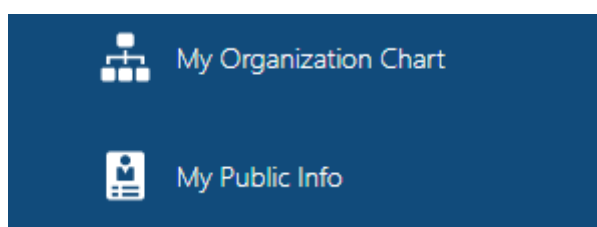
Personal Details   Document Records

Personal Details: Refer 3.3 Personal Information
Document Records: Refer 3.6 Document Records
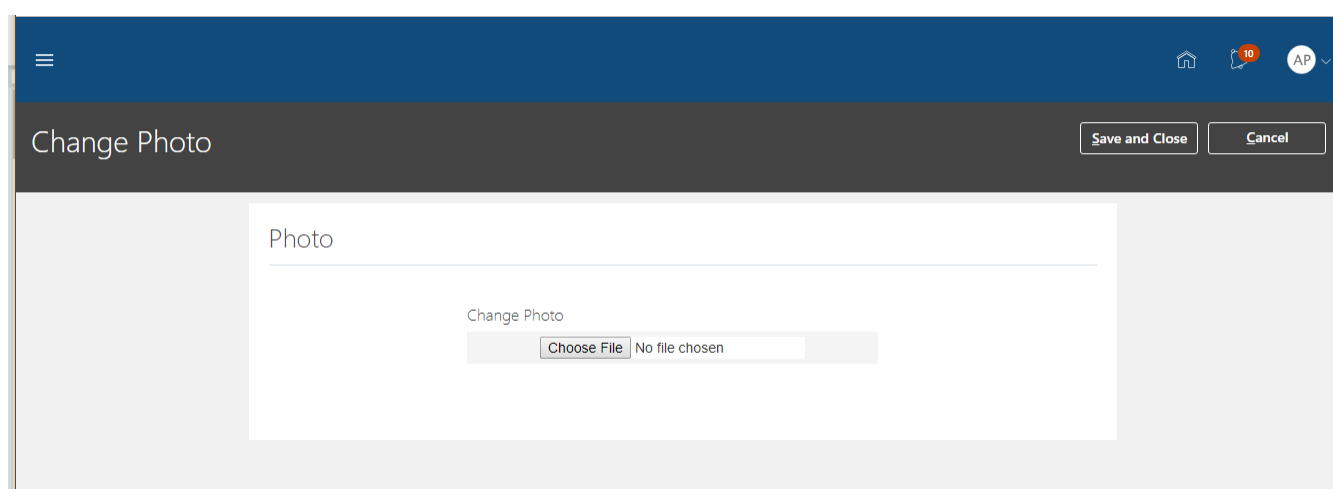
Contacts Icons: Refer [3.3 Personal Information](#)

For Org chart and Public Info, Refer [3.4 Directory](#)

Click the above icon to change photo. Clicking on the above icon leads to the following page
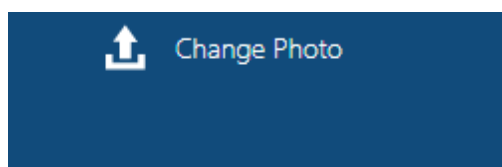
Choose file (photo) from PC , save and close.

1.2 ShowMore Quick links

Please click Show more under "Me" tab
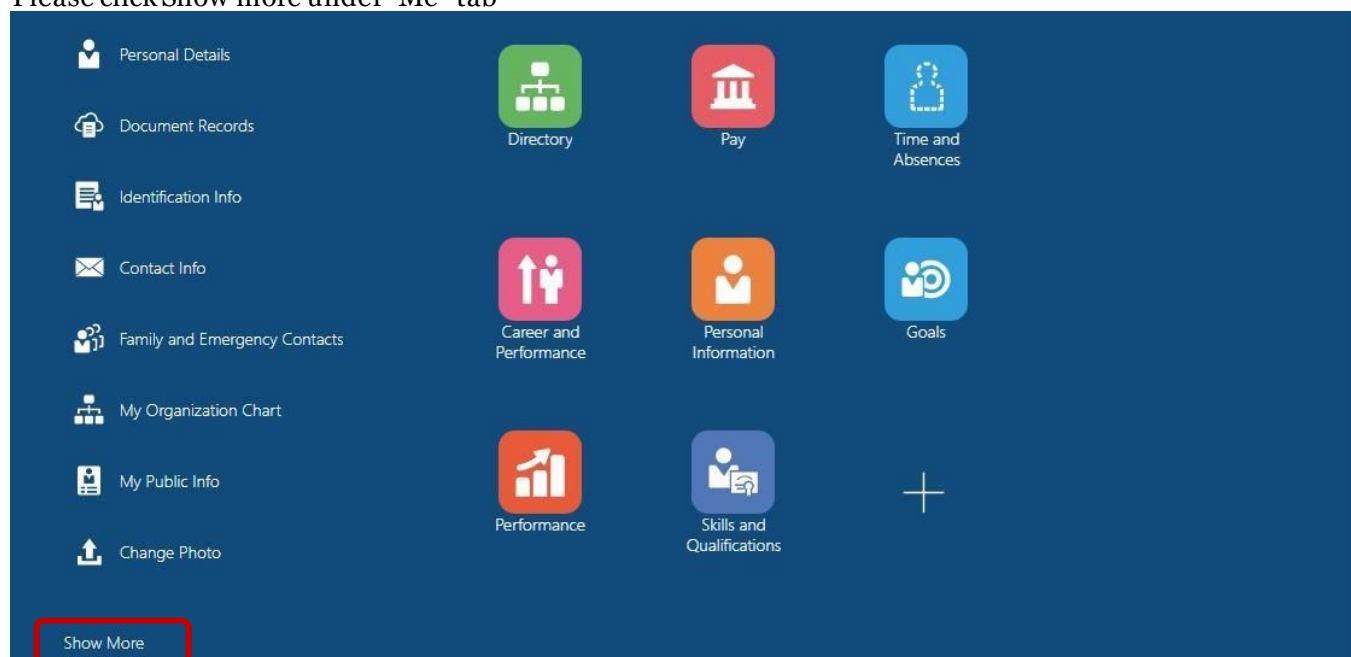
Absences
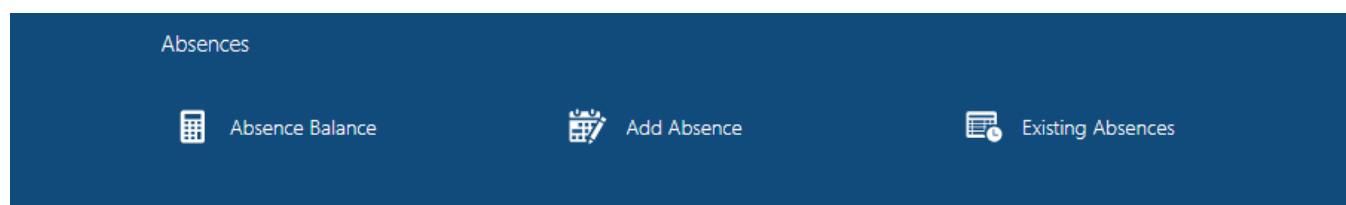
The employees can apply for leave through the quick action link. The number of leaves available can be checked in "Absence balance". Please see absence Manual for detailed explanation

Career and Performance

The employee can manage goals (add/edit/delete) and look at their past performance (skills and Qualifications Icon) and solicit feedback (Feedback requests) through the below links. Please refer PMS manual for detailed explanation

Schedules

By clicking on calendar icon, the employee can see the list of holidays and manage their schedule. Team Schedule will indicate the shift details of the team members.

Calendar

Team Schedule

Compensation tab allow employee to view their compensation (My compensation)
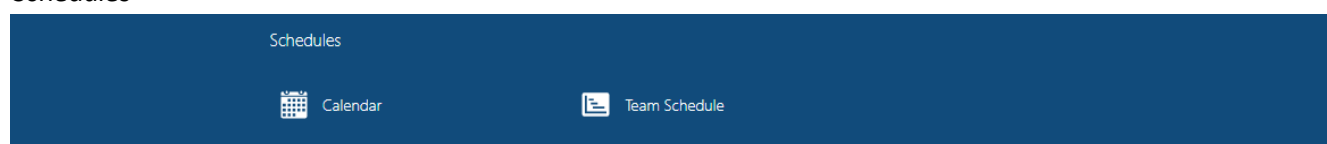
Clicking on "My Compensation" leads to

2. Icons in "Me" Tab
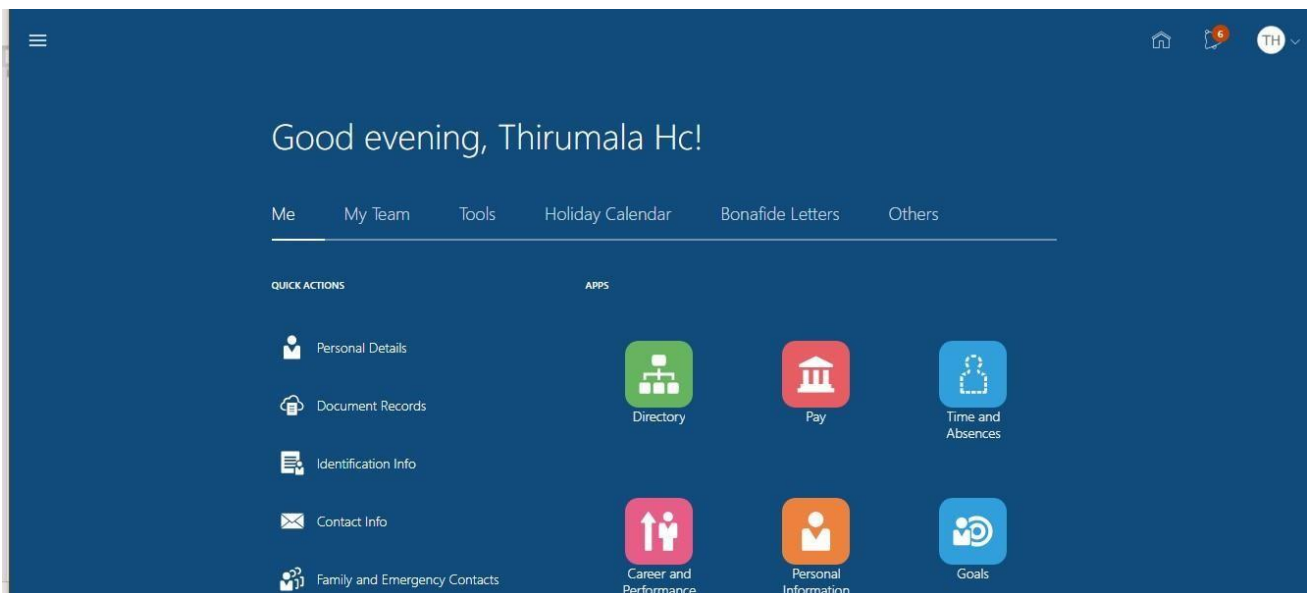
Employees can look at other employee's data which are public by clicking on Directory Icon
Please refer 3.4 Section of this manual for details
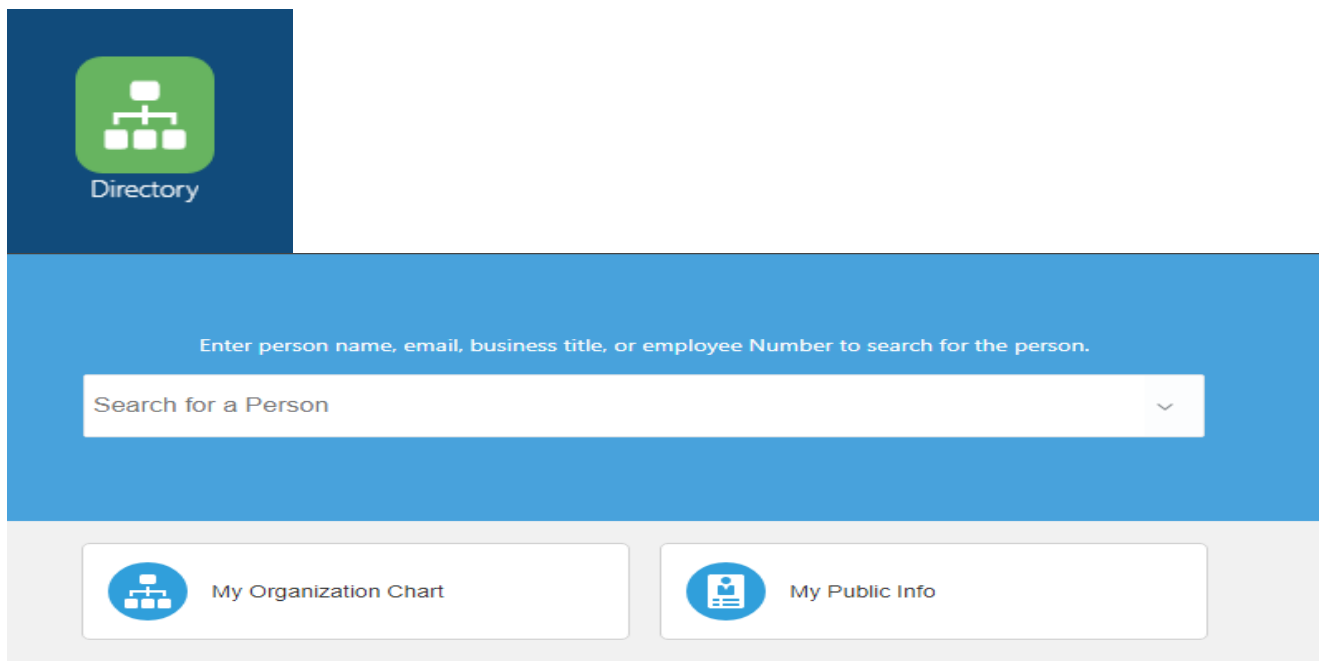
Pay icon allows employees to manage the receipt of salary
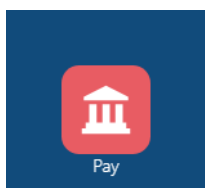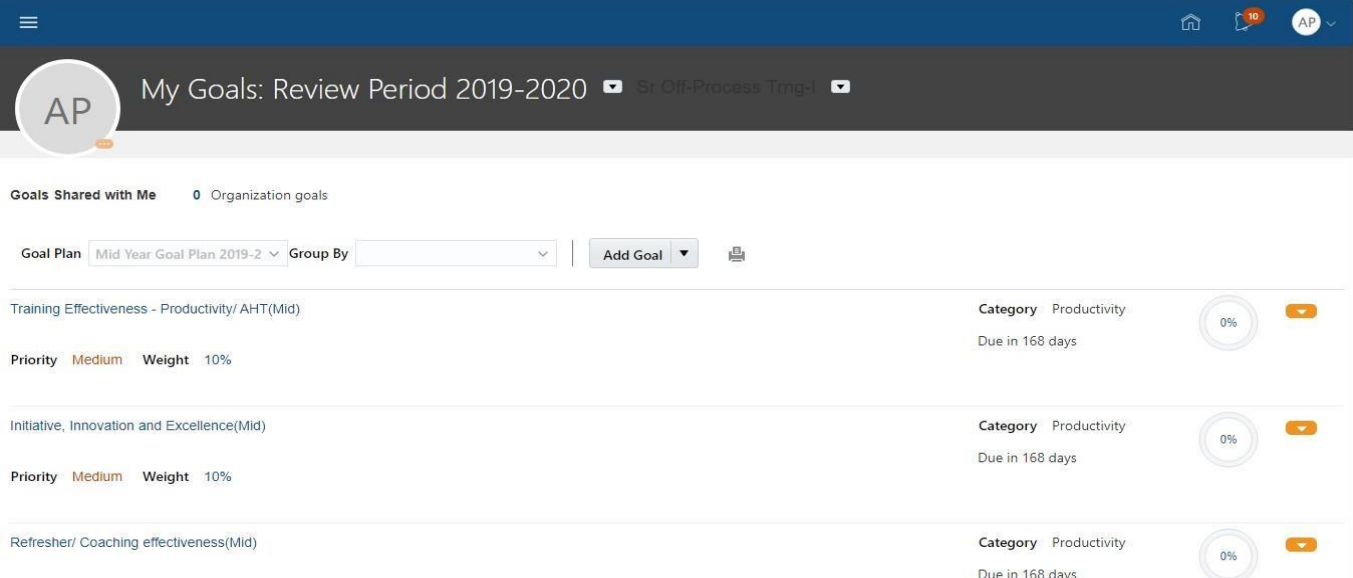
Please refer 3.1 Payment Methods for more details

Goals icons enables user to manage their goals and take part in the performance management system of the organization
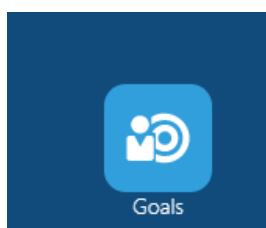
Clicking on Goals icon leads to the following page:

For add/edit/remove goals, please refer PMS document
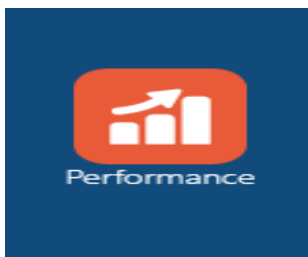
Clicking on the above icon leads to the following page
Performance Evaluation Icon enables employees to self-evaluate their work and solicit feedback.

For details, please refer PMS manual

Skills and Qualification icon (see below) displays past performance. Please refer <u>3.5 Skills and Qualifications</u> for details
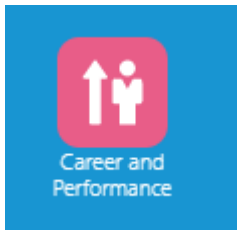
3. Core HR Options - ESS

3.1 Payment Methods

This option enables the employee to receive salary in the entitled account
Click on the Pay Icon in "Me" Tab or payment methods icon in show more tab under Quick Action links
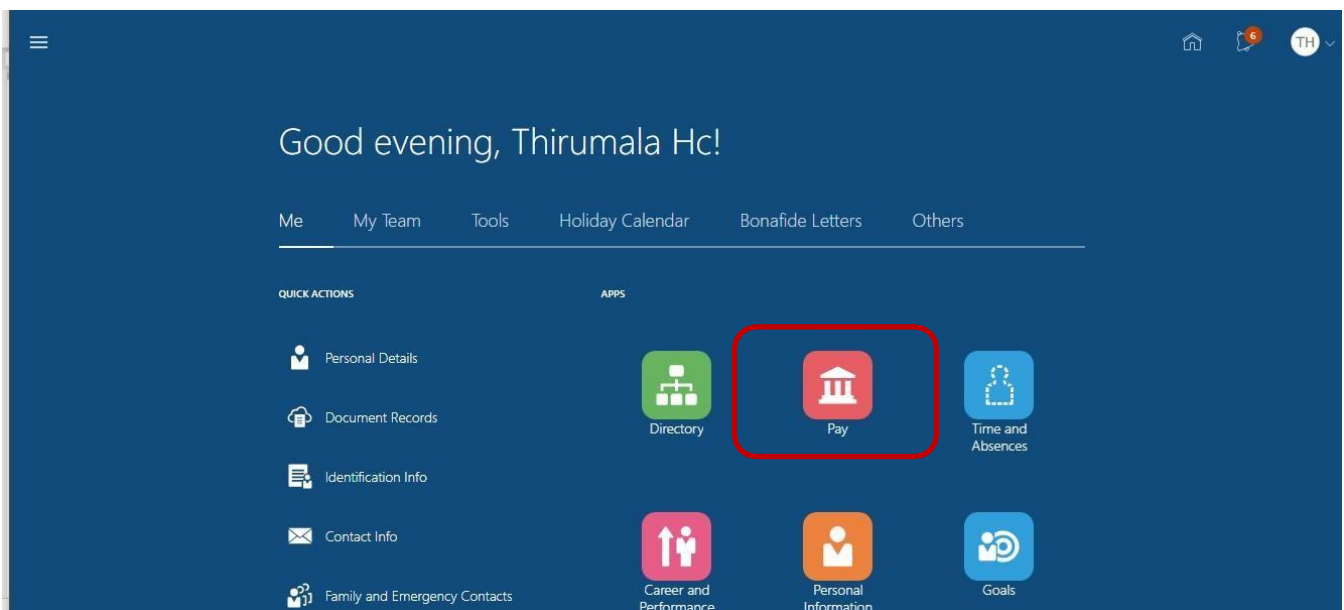
Click Payment Methods
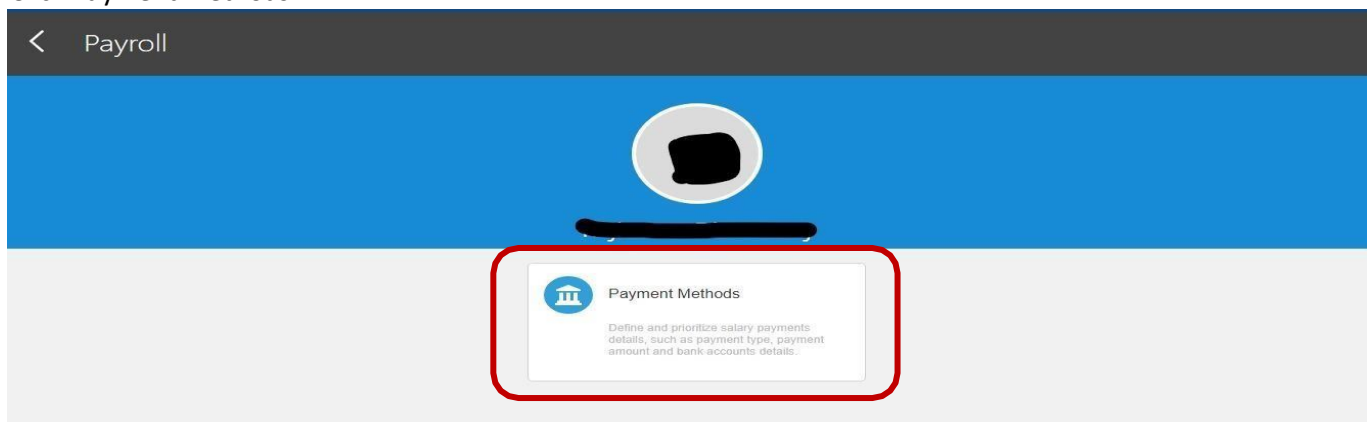
Click Add for entering bank details
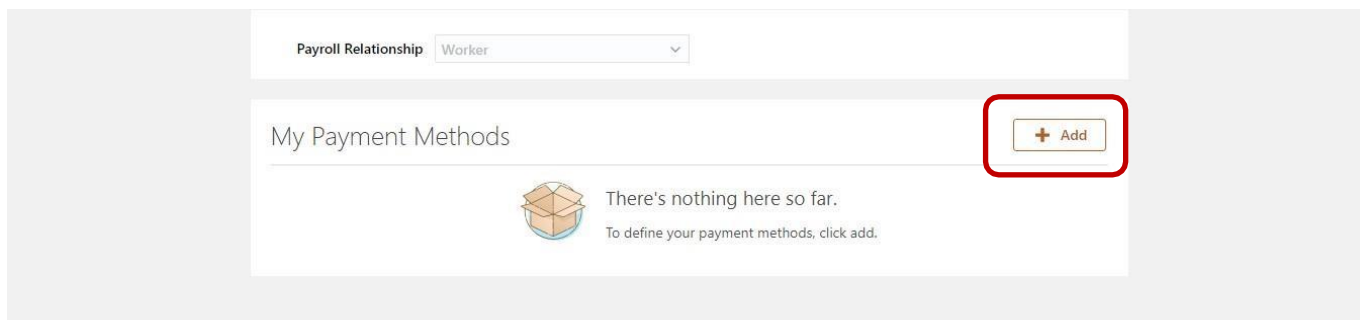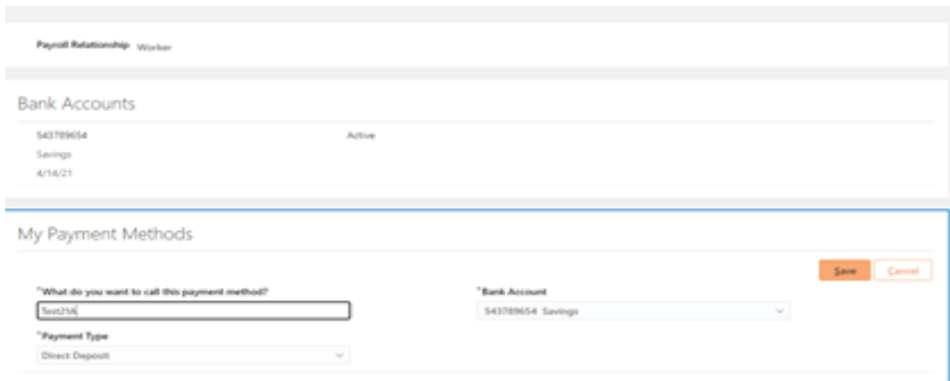
3.1.1 Payments in India

Step 1 : The employee has to add the Bank Account Details first and save It as shown below (3.1 Payment Methods)
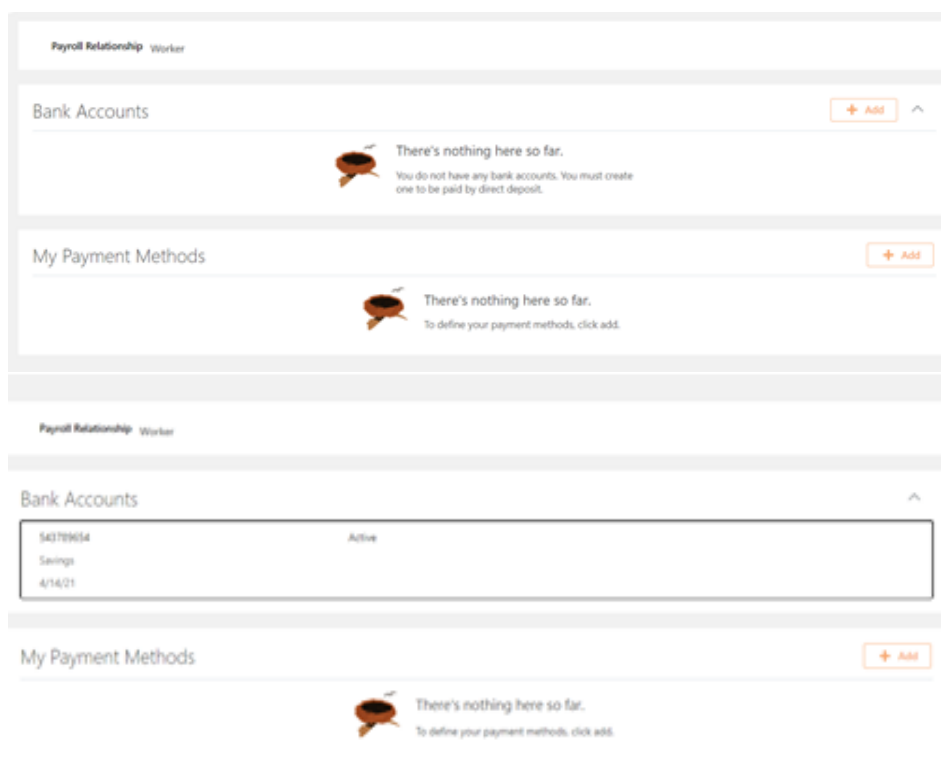
Step 2 : Once Bank Account Details are entered, the Employee has to ADD MY Payment Methods
And Save It
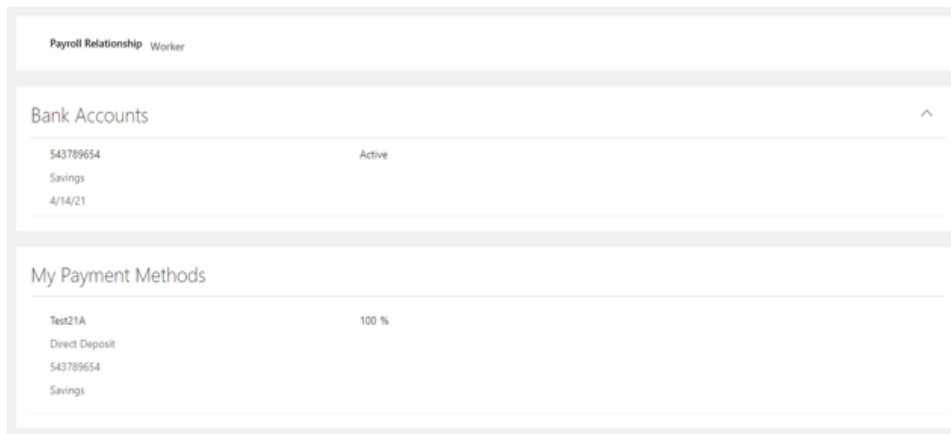
Enter the necessary details Points to
Note:
1. Account type must be savings
2. Bank Account should be from HDFC or Citi Bank
3. Once submitted, the payment details cannot be edited

Once Saved, the following gets displayed
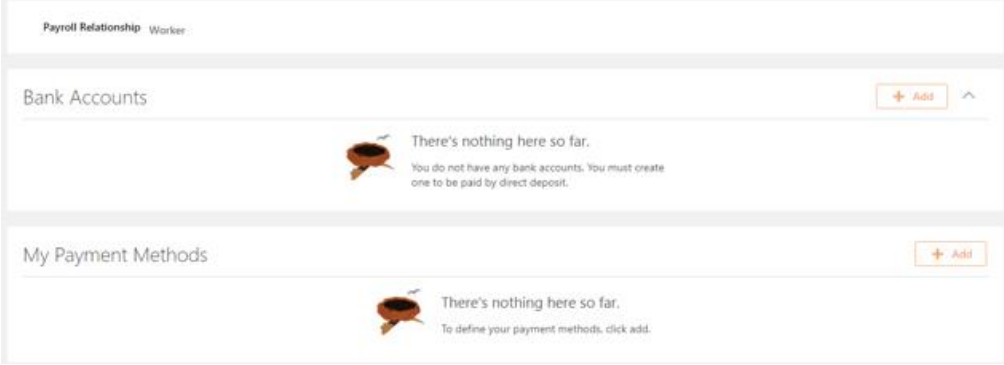
3.1.2 Payment in USA

The employee has to add the bank account number by clicking the "Pay " Icon in "Me" tab or "Payment Methods" Icon under Quick Action links. Follow the navigation as shown in Payment Introduction.(3.1 Payment Methods)

1. In USA, the employees can enter 8 account numbers (maximum) for receiving salary.
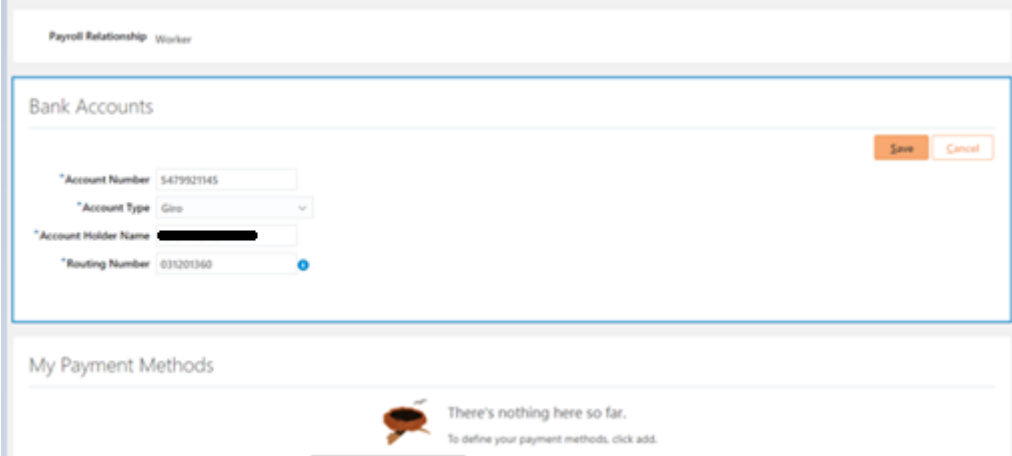
Note: At least one account type should be reimbursable account. If there is no reimbursable account, expenses will not be reimbursed.

Step1 : The employee has to add the Bank Account Details first as shown below :

Click on ADD on Bank Accounts and Save

Step 2: Once Bank Account Details are entered, the Employee has to ADD MY Payment Methods and Link the Bank Account Details

The account types are displayed below:

2. The percentage of payment should be entered in each account number. Cumulative percentage should not exceed 100%. If the total percentage exceeds 100%, the system will throw an error

If the cumulative percentage doesn't exceed, the remaining percentage is calculated and assigned to the account number (where percentage is not specified) as remaining pay

3.1.3 Payment in UK

Follow the navigation as shown in Payment Introduction.(3.1 Payment Methods) The account type is savings.

Step1 : The employee has to add the Bank Account Details first as shown below :

Step 2 : Once Bank Account Details are entered, the Employee has to ADD MY Payment Methods and Link the Bank Account Details

My Payment Methods

Delete	Save	Cancel

*What do you want to call this payment method?
Test21A

Country
United Kingdom

Payment Type
International Transfer

*Bank Account
609476 96230407 Savings

3.1.4 Payment in Europe

For European banks, IBAN number should be added
Follow the navigation as indicated here ([3.1 Payment Methods](#))

Step1 : The employee has to add the Bank Account Details first as shown below :

Payroll Relationship Worker

Bank Accounts + Add

There's nothing here so far.
You do not have any bank accounts. You must create one to be paid by direct deposit.

My Payment Methods + Add

There's nothing here so far.
To define your payment methods, click add.

Enter Bank Account Details and Save.

Payroll Relationship Worker

Bank Accounts Save | Cancel

Account Number	
*IBAN	
*Account Type	
*Account Holder Name	Elain Tschoepe
*BIC Code	

Step 2 : Once Bank Account Details are entered, the Employee has to ADD MY Payment Methods and Link the Bank Account Details

Payroll Relationship Worker

Bank Accounts

44440337   Active
DE58401545300044440337
Giro
11/5/19

My Payment Methods

Delete | Save | Cancel

*What do you want to call this payment method?
Test21A

*Bank Account
44440337 DE58401545300044440337 Giro

*Payment Type
Bank Transfer

3.2 Submit Resignation
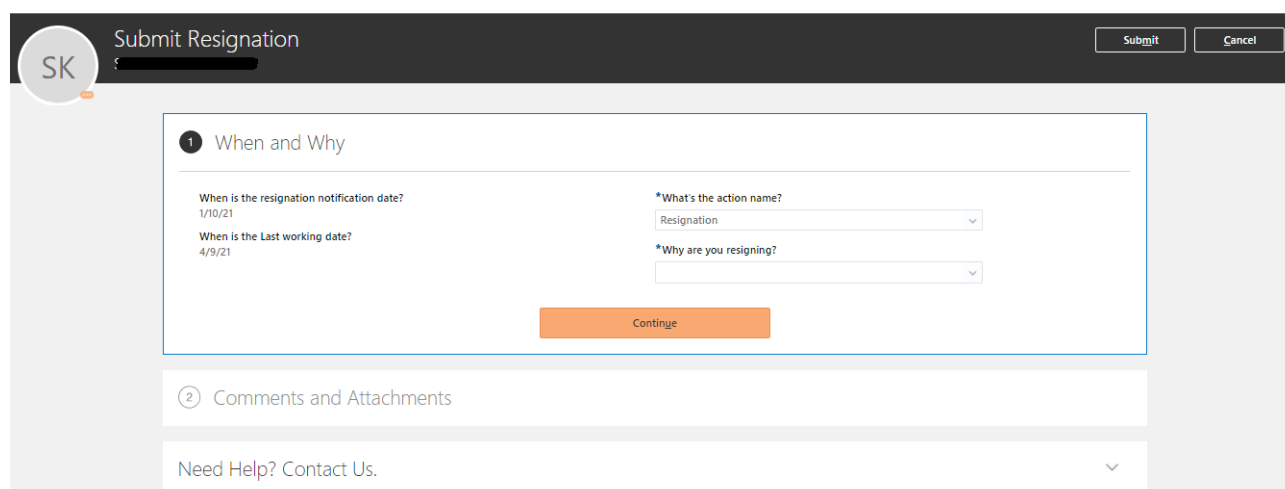
Navigation: Home > Me tab
Click Show more and proceed to employment tab
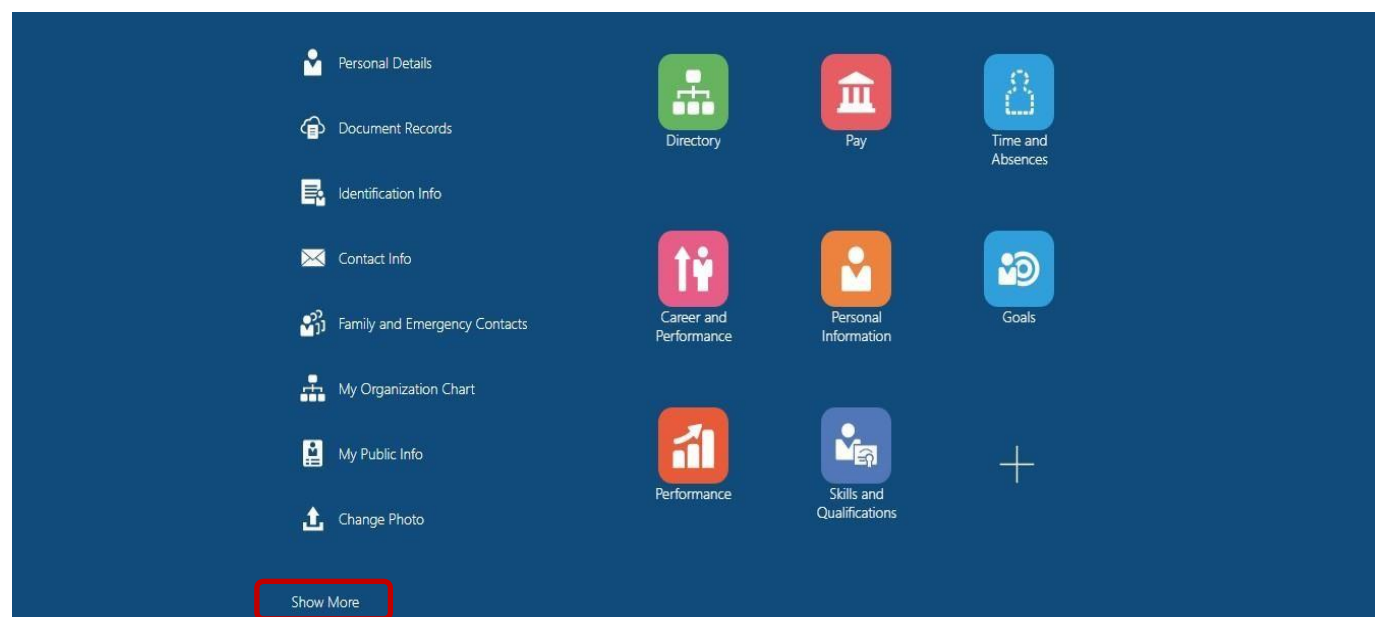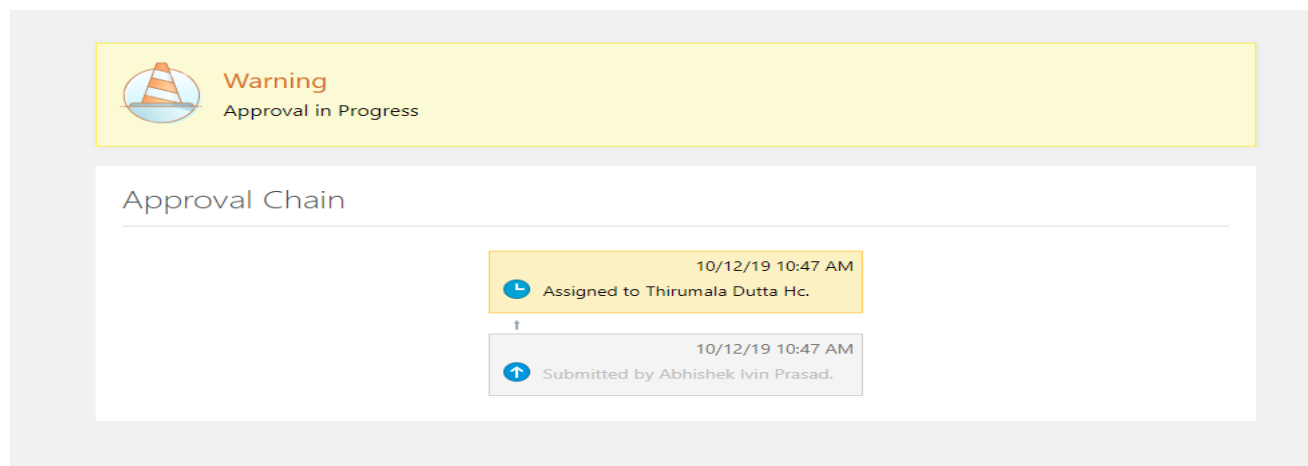

Click on resignation

Enter the necessary details. Date of notification and resignation date is auto populated. Date of notification is the date on which resignation is initiated in the system. Resignation date is calculated as per Notice period of the employee

Once resignation is submitted, the following page is displayed

Notification goes to the manager for approval/rejection.

3.3 Personal Information

Click Personal Information in Me tab
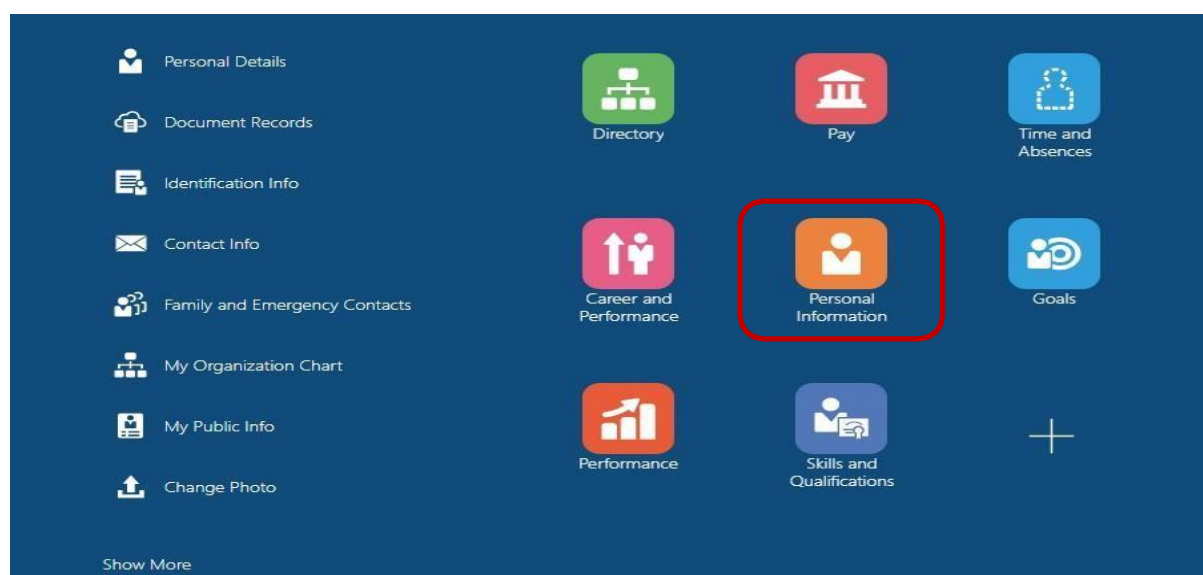
Alternatively, click on show more in Quick Action links.
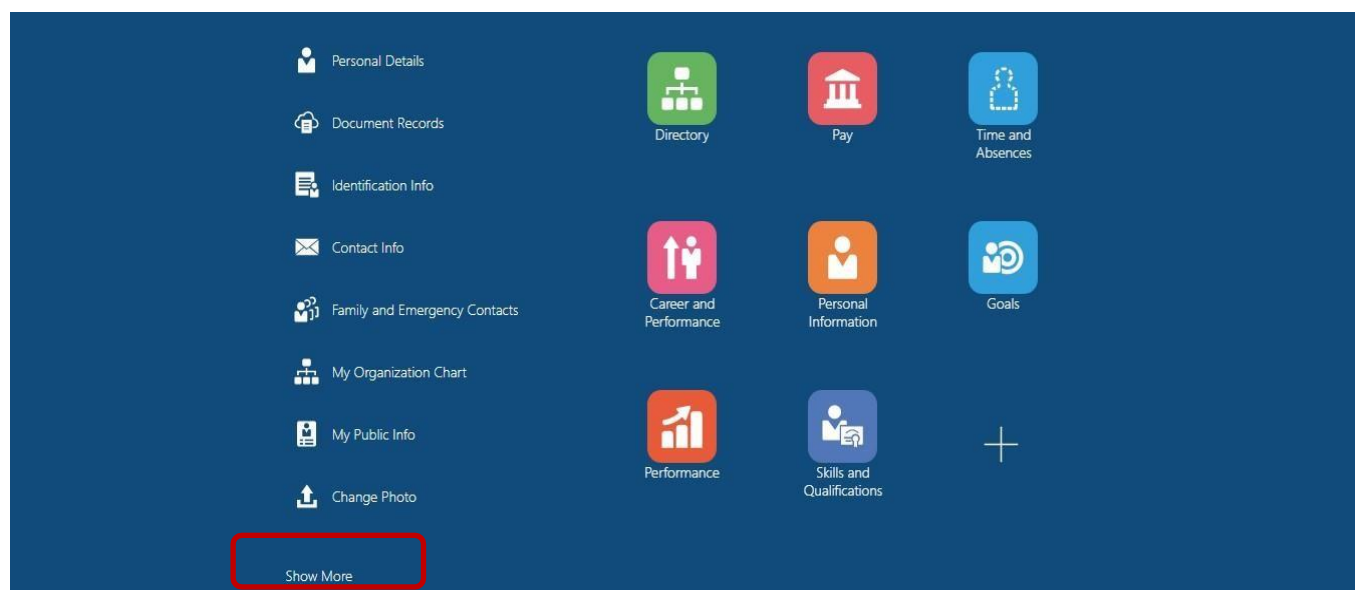
Then go for Public info in Personal Info
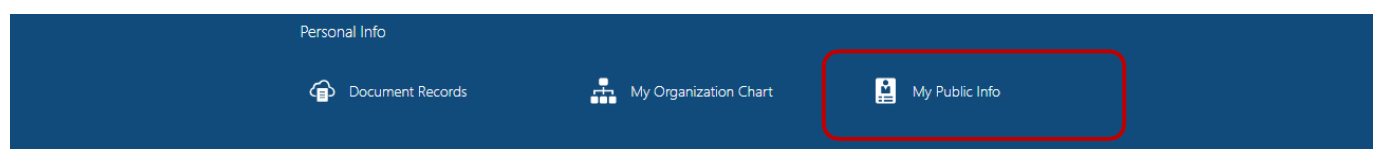
Various options are displayed in Personal Information
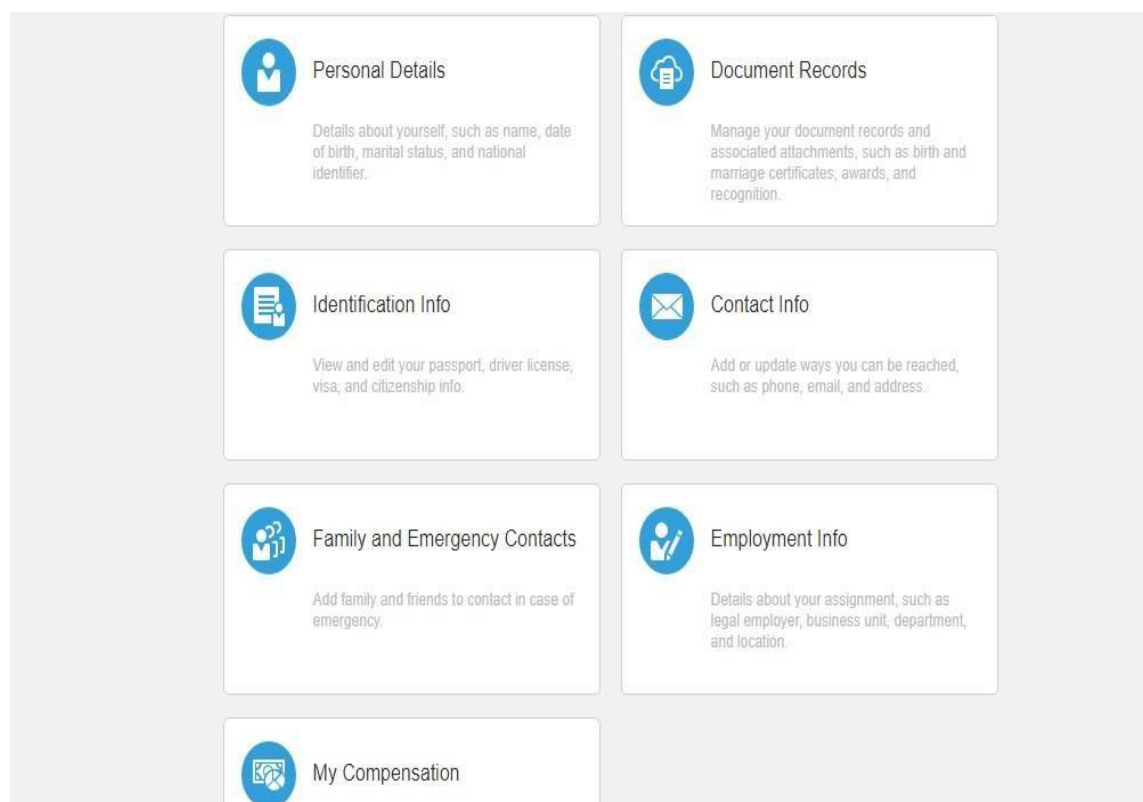
Personal Details like Name, Address, emergency contacts, citizenship etc can be entered and updated using the above links. Few screenshots of the above links are displayed below:

Personal Details

Contact Info

Personal Details (Name/Demographic Info/National Identifiers/Biographical Info/Disability Info)
- Name and date of birth is non editable. It appears by default.
- Demographic Info includes country, religion, start date, Marital Status, Gender and Highest education degree. These are editable
- National Identifiers requires employee to choose the respective country and submit Identification details.

Contact Info:

- It requires employee to enter contact address for communication. There are different types of address – Mailing/ Permanent/Emergency/Work
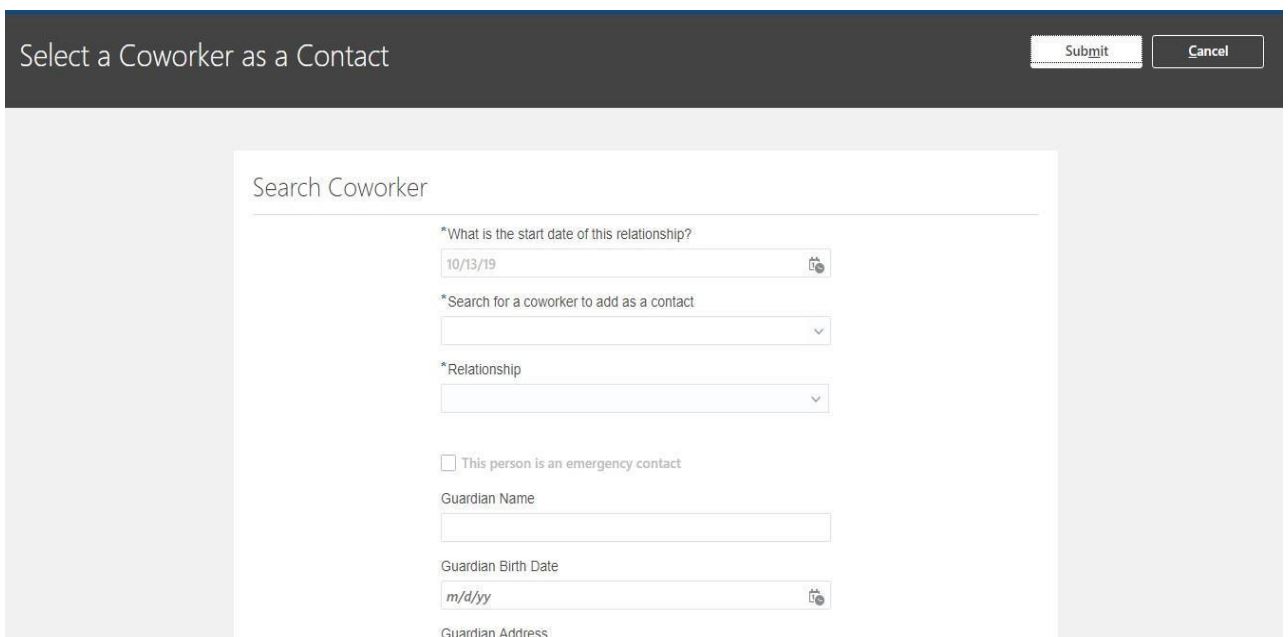
Family and Emergency Contacts
Employee is required to provide these contacts for the company to communicate during emergency and other unforeseeable circumstances.
The Employee can add his/her family members and also co-workers.
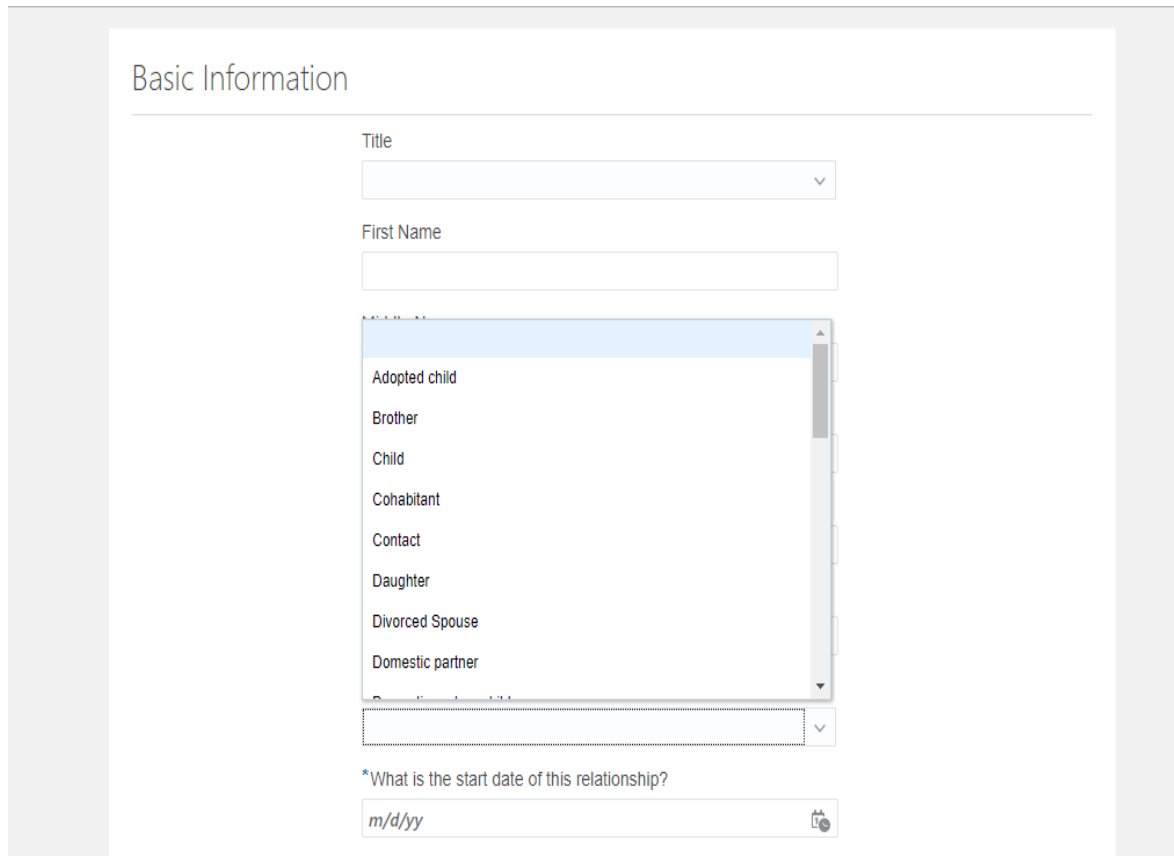
When the employee selects "Select a co-worker as a contact", the following page gets displayed
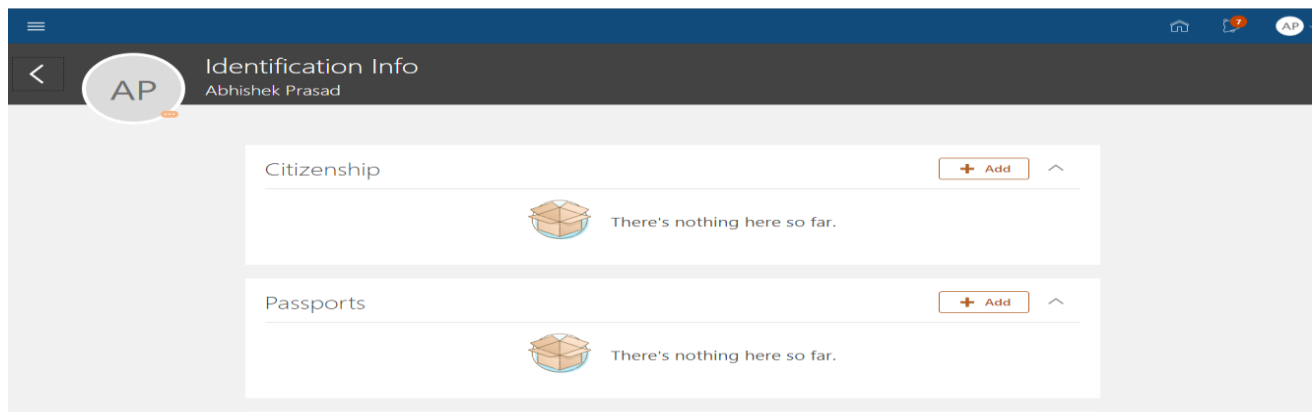
When the employee selects "create a new contact", the following page gets displayed.
The employee can choose any of the relationship available in the options as shown below.

Identification Info: consists of citizenship and passport information
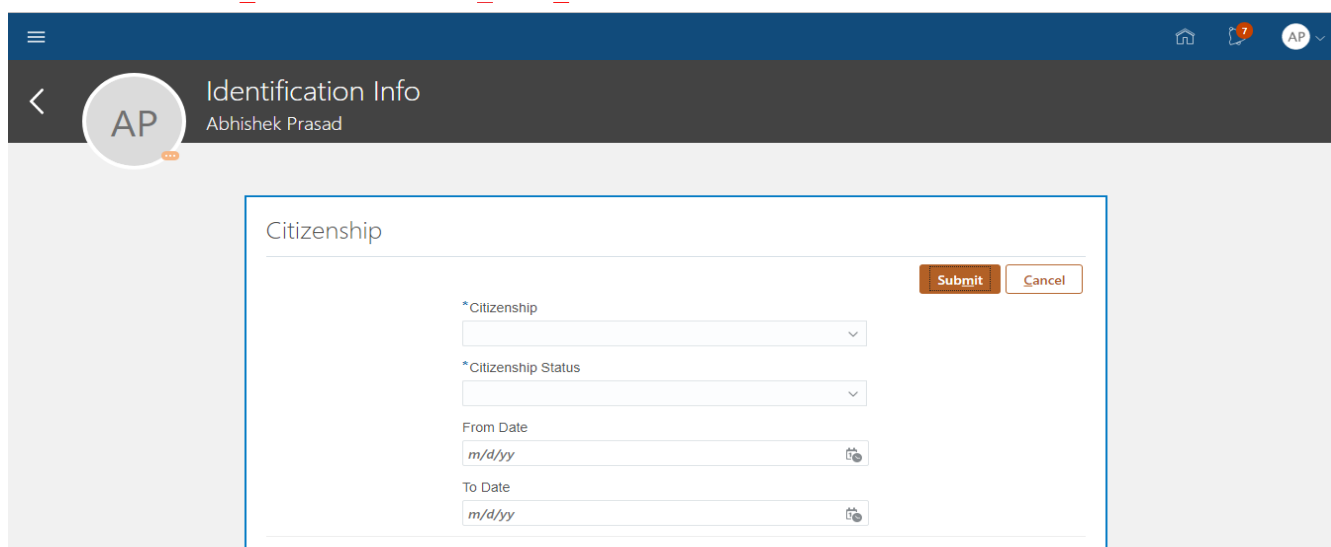
Click Add to enter the information
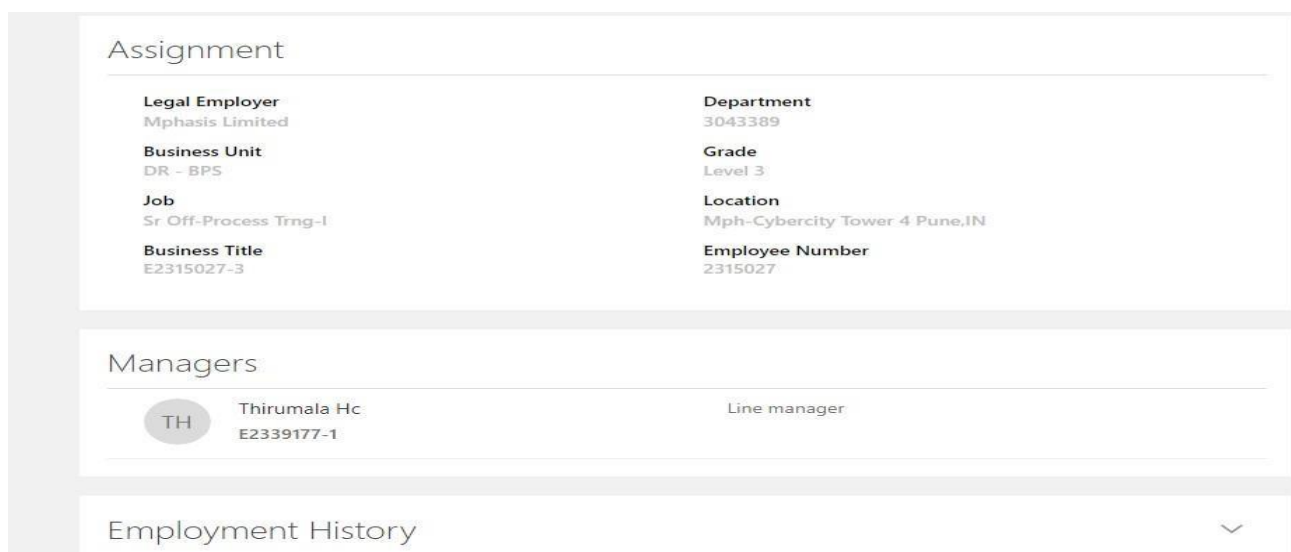
Employment Info and Compensation provides details of employment number, grade, line manager and current salary. These are non-editable
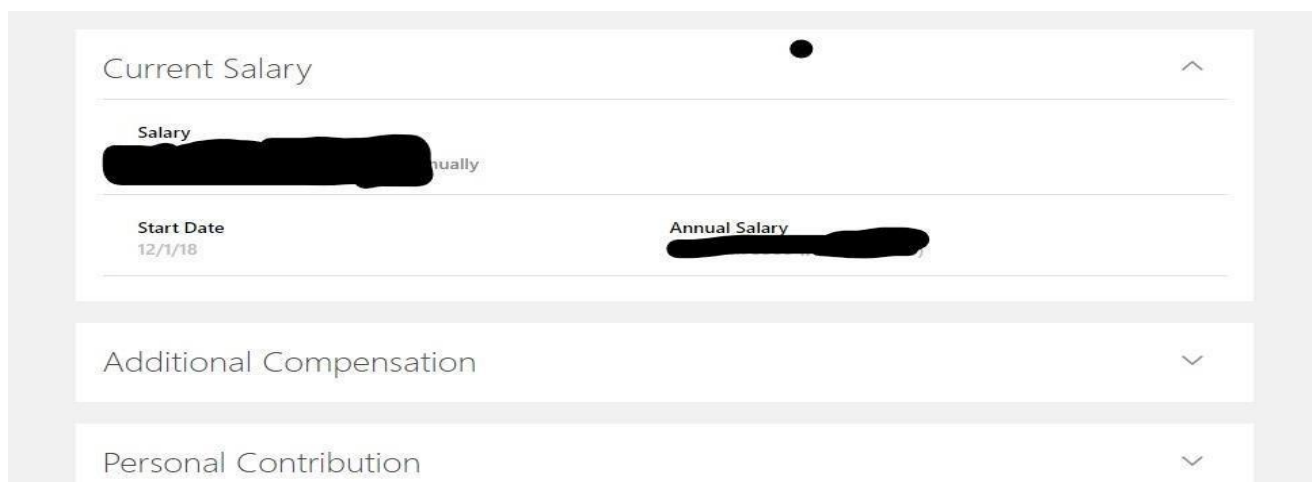
3.4 Directory

Navigation to reach directory is through *Home > Me > Directory'.*
The options on Directory are:

- My Organization Chart
- My Public Info
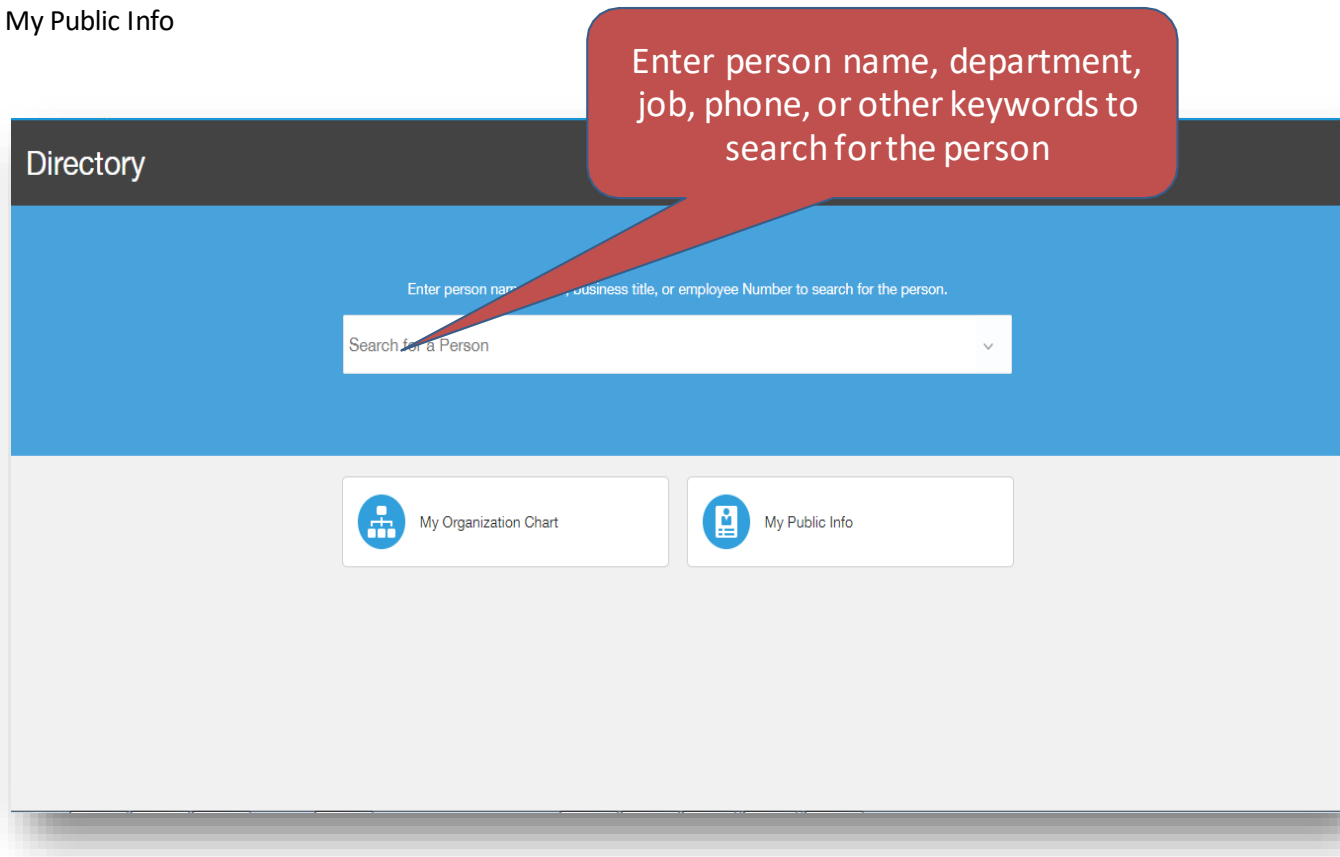
If an employee clicks Organization chart, it will indicate his/her position in the company with relation to other employees in his line of business
The chart can be arranged based on name/business title (look at sort option)
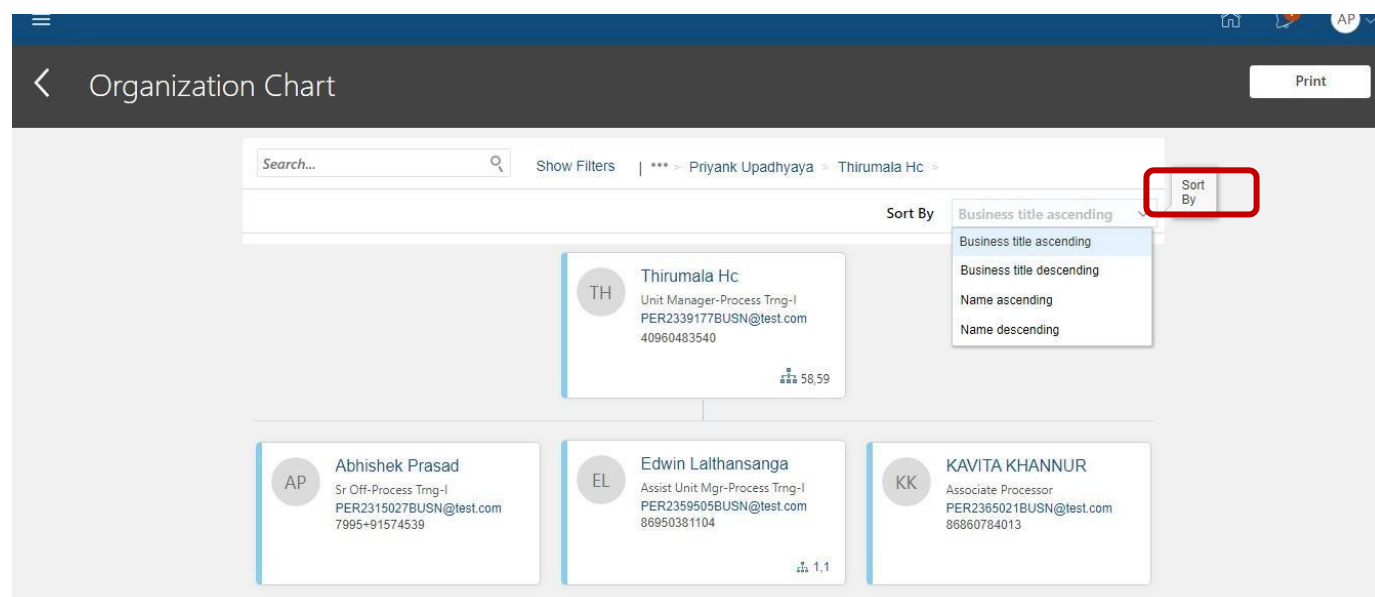
Use print option to download the organization chart

Click on 'My Public Info' to view which details of employee is available to others in the organization

The following screen will be displayed:

3.5 Skills and Qualifications

In Skills and Qualifications, the employee can view past ratings
Navigation: Home > Me tab > Career and Performance > Skills and Qualifications
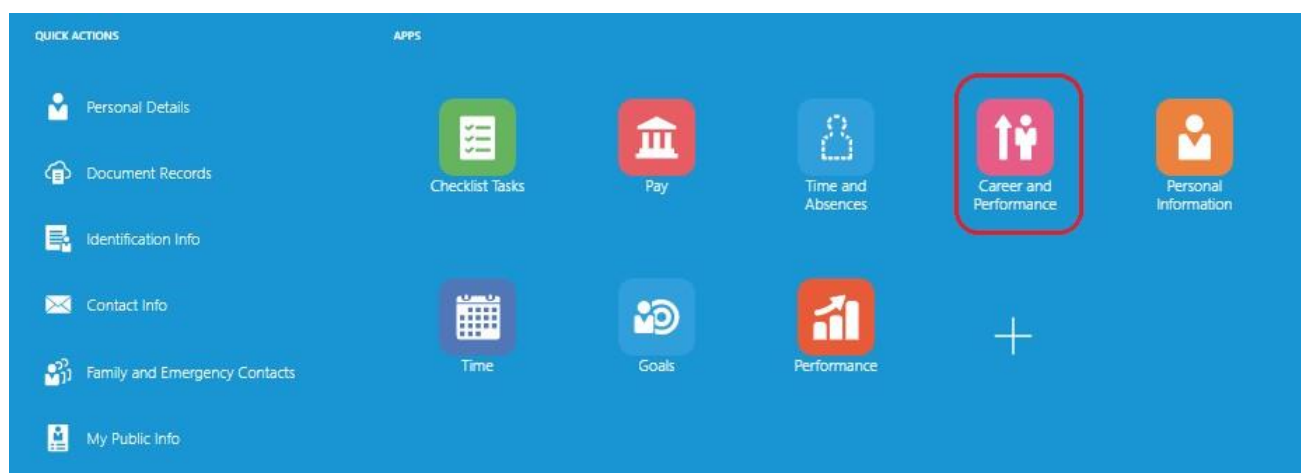
Click edit to look at the past performance ratings

Skills and Qualifications

Past Performance Ratings

Performance Review Start Date 4/1/18	**Performance Review End date** 3/31/19
Final Performance Rating 5	**Performance Review Name** Annual Performance Review - 2019
Performance Review Start Date 4/1/18	**Performance Review End date** 9/30/18
Final Performance Rating 0	**Performance Review Name** Mid Year Review - 2018

3.6 Document Records

Document Records can be used to manage your document records and associated attachments, such as birth and marriage certificates, awards, and recognitions

Click Document Records in Quick Action links under Me tab.
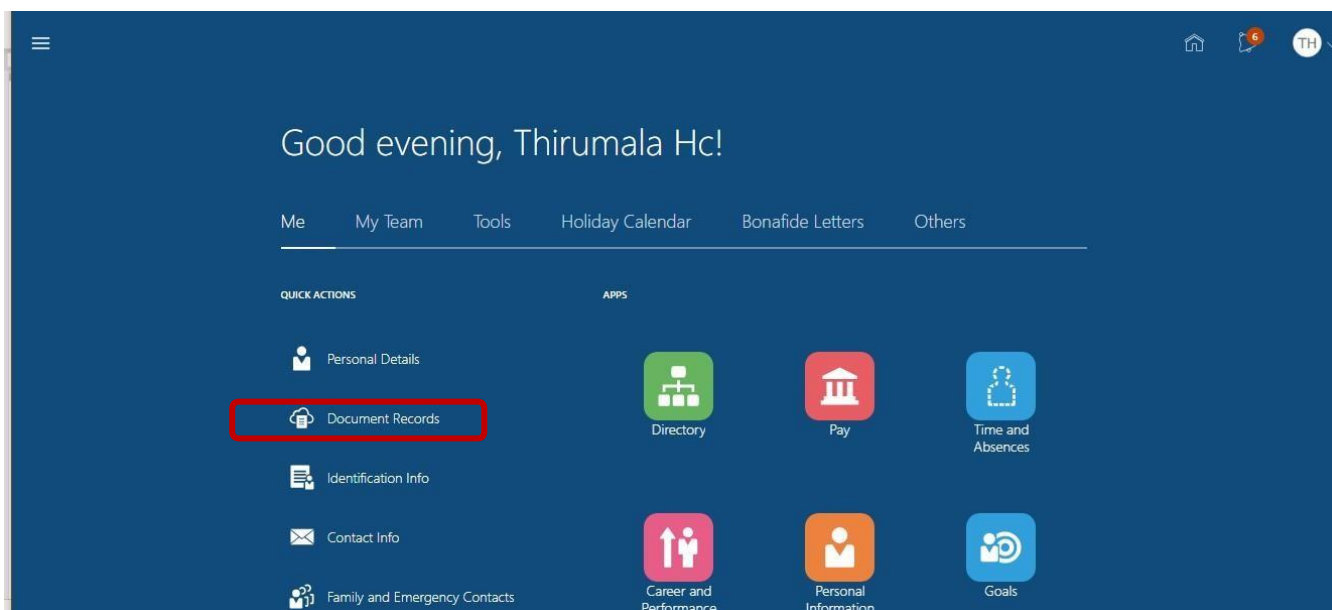
Click Add to submit documents
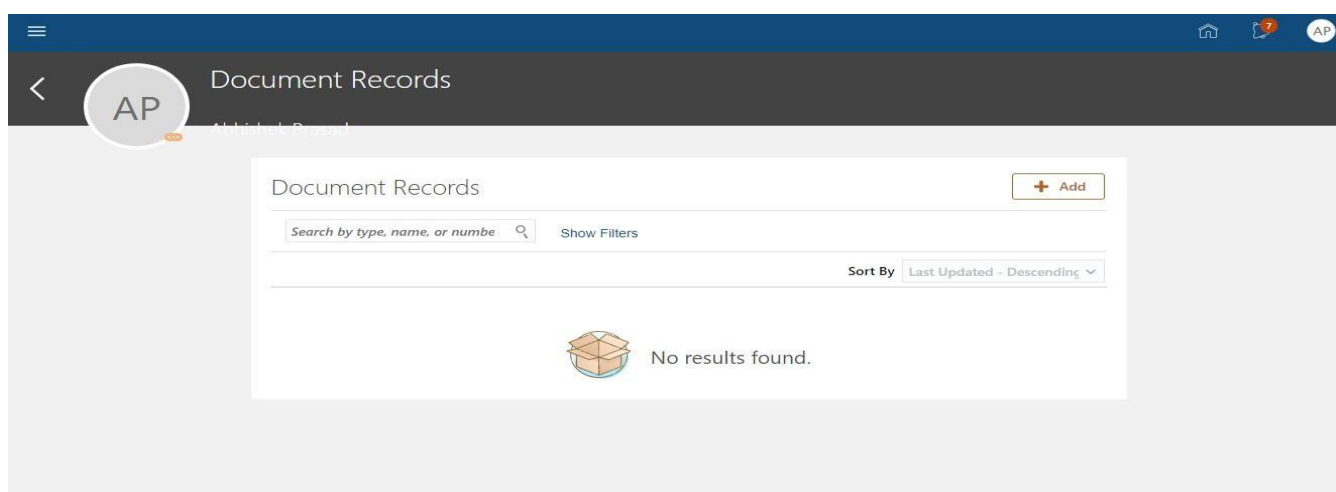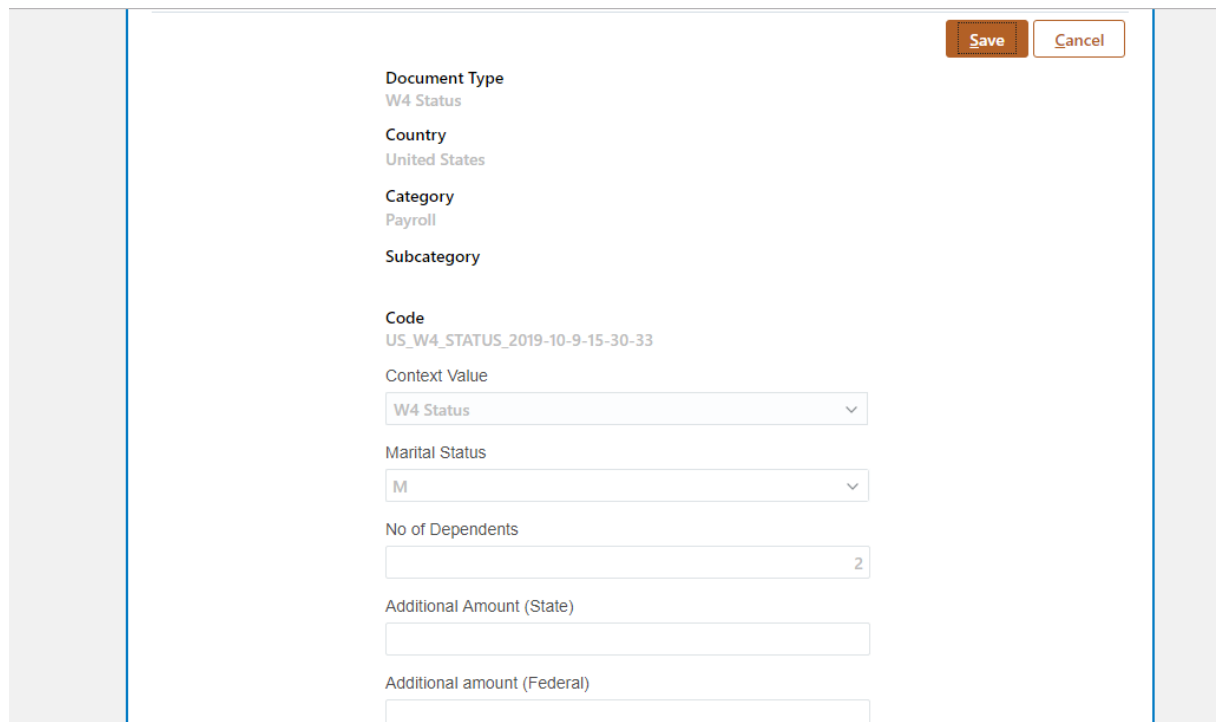
Suppose the employee wants to submit education documents. Select the category from document type and enter the details
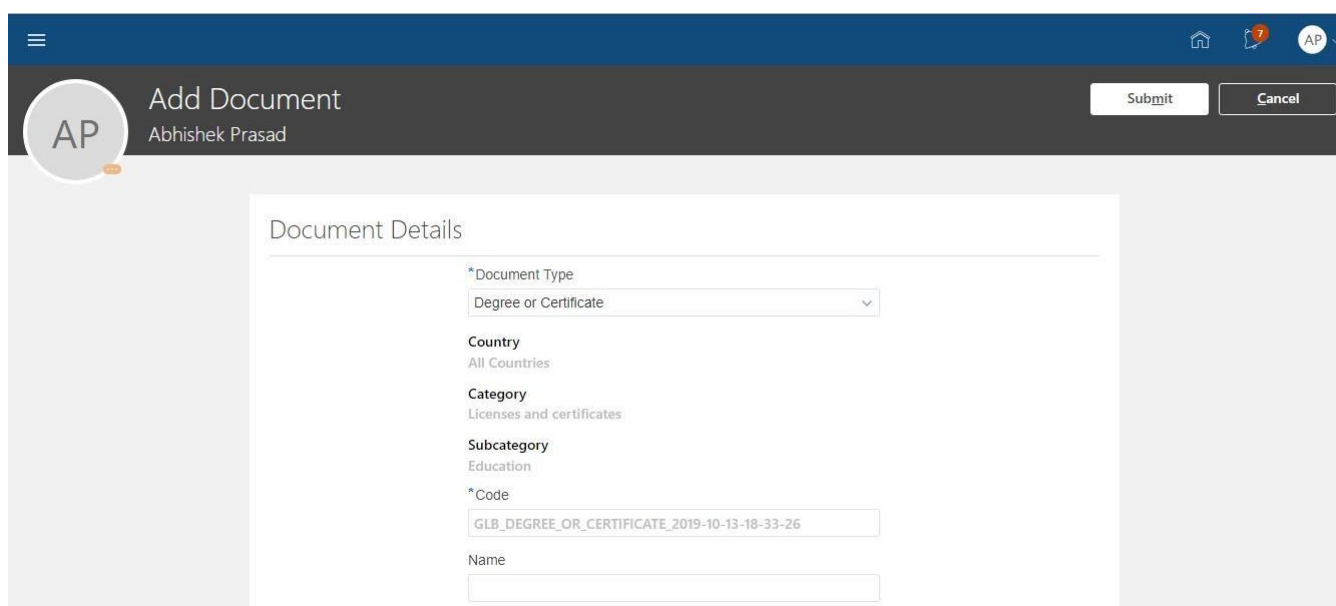
Please Note that employee in USA should submit W4 documents. Choose W4 status document type. The context value should be W4 Status. Please enter the marital status and dependants. Enter the amount for state and federal accordingly.

4. Icons In "My Team" tab – (Core HR for Managers)
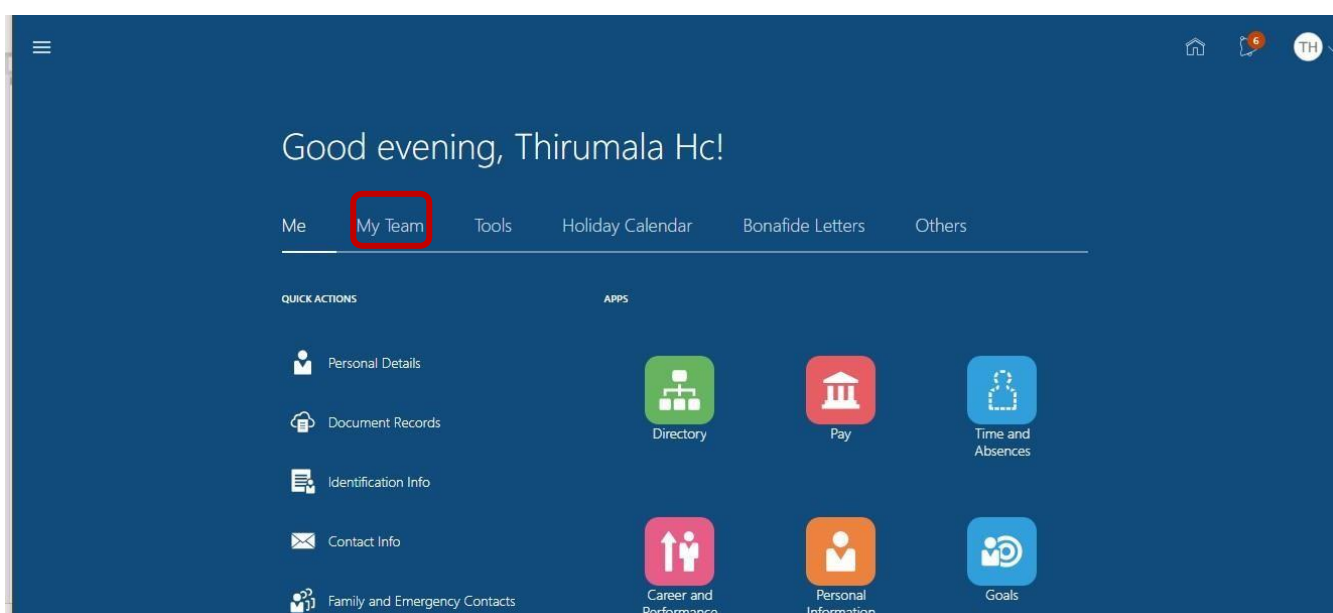
The "My team" icon gives the basic introduction to the employees directly reporting to the manager
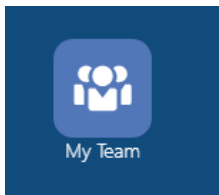
The icon leads to the following page
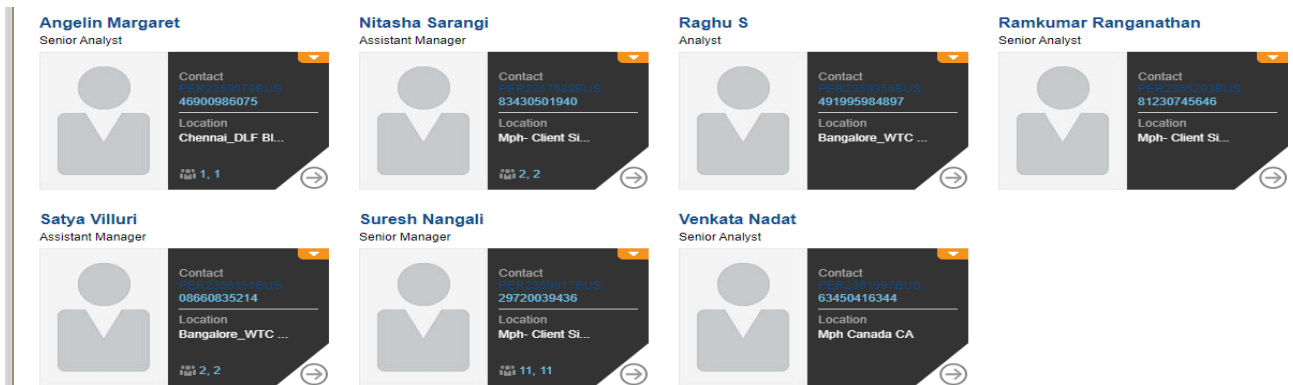
The orange button could be used by the manager for various options as shown below:
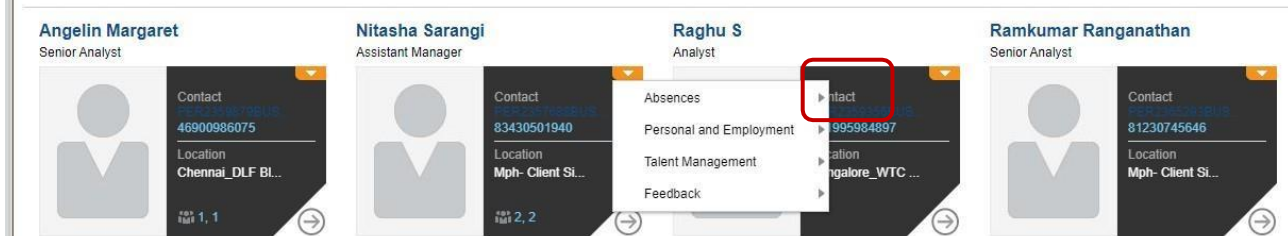
The following are the navigations under 'My Team'

My Team – All Manager actions can be performed under 'My Team' that include
Personal and Employment
Absences
Talent Management
Feedback

4.1 My team - Absences

Click on 'Review' and submit

4.2 My Team - Personal and Employment

- Change Legal Employer
- Change Location
- Change Manager
- Manage Document Records
- Manage Work Relationship
- Termination
- Transfer

Change Manager
In case the Line Manager needs to be changed for any of the 'Direct Reports', click on 'Change Manager'
Navigation: Home > My team tab > My team icon. Click "Change Manager" in Person and Employment link
under Action button (orange button)

Click Continue

Input the start date and reason for 'Manager Change

Click Edit

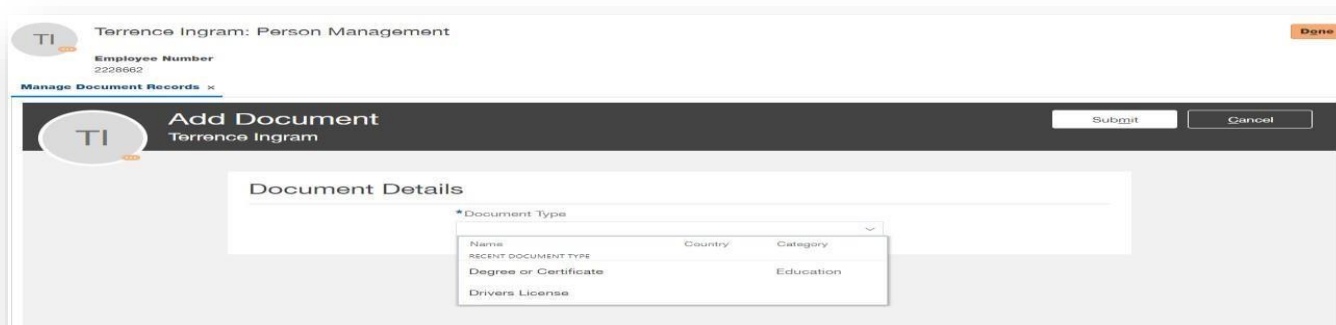Input the new manager name
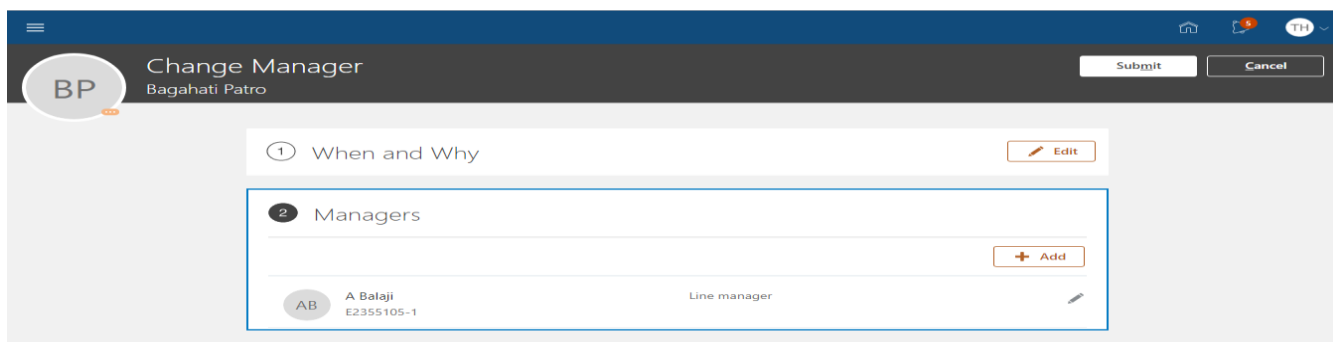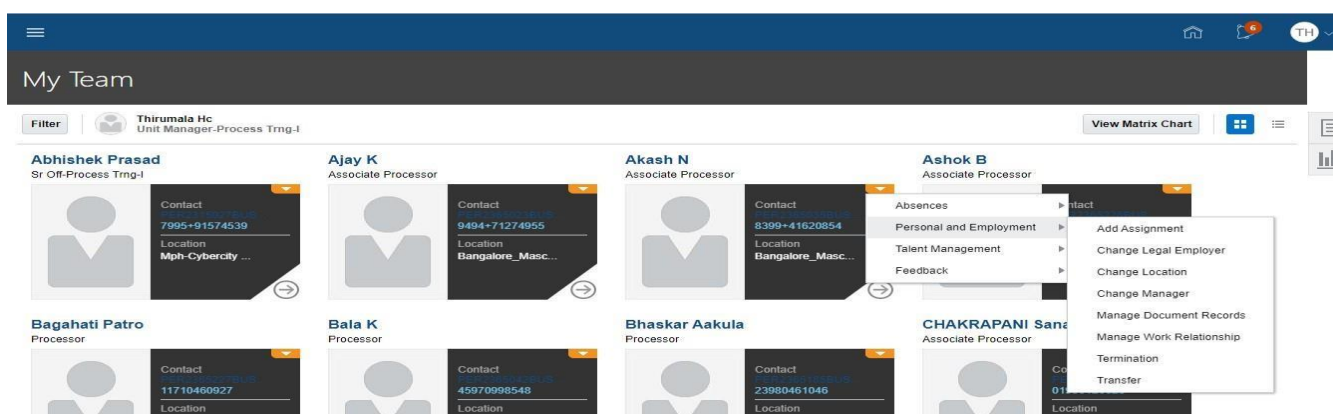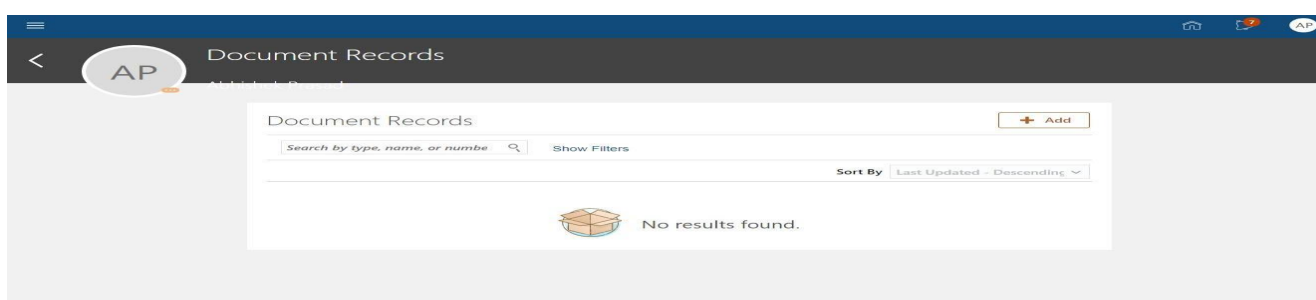
Click Ok and then Submit

Manage Document Records – By clicking on Manage document records, Line Manager can use this option to upload any important documents against employees reporting to him/her.
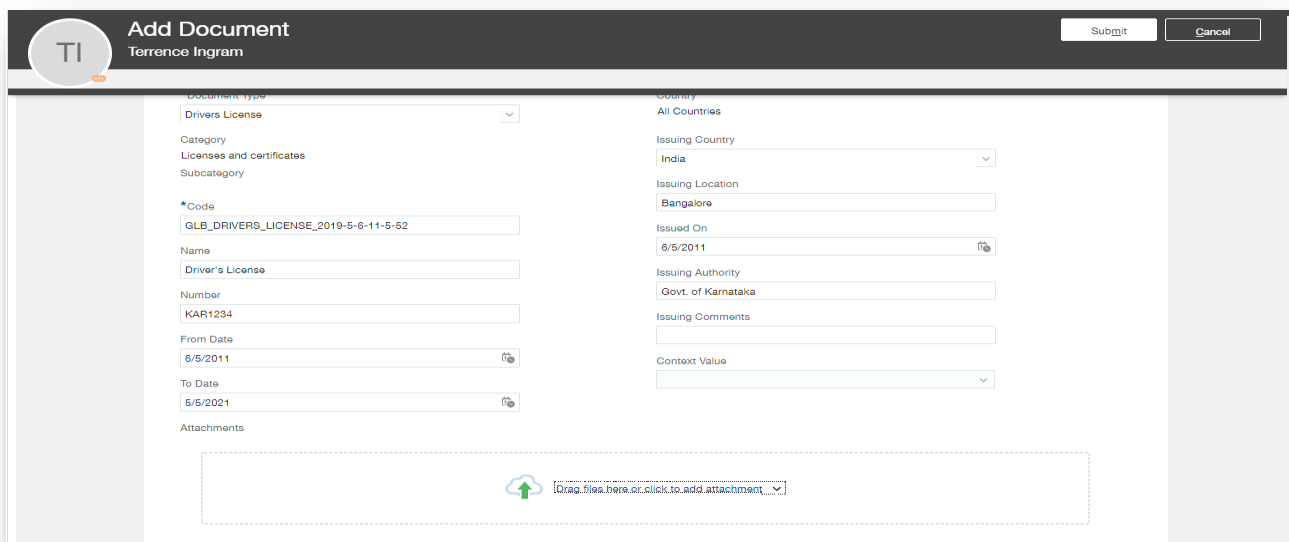

Click add

Select the required document type

Type the required information and submit

Termination:

Manager initiated separation could be due to any reasons like:

- Vol - Health Reasons
- Absence without Intimation (AWOI)
- Vol – Continuing Education

In case of any of the reasons the Line Manager initiates the termination process for an employee, he/she must provide the reason for the termination and then submits for approval.

Navigation: Home>My Team

Click on My Team icon in My Team Tab
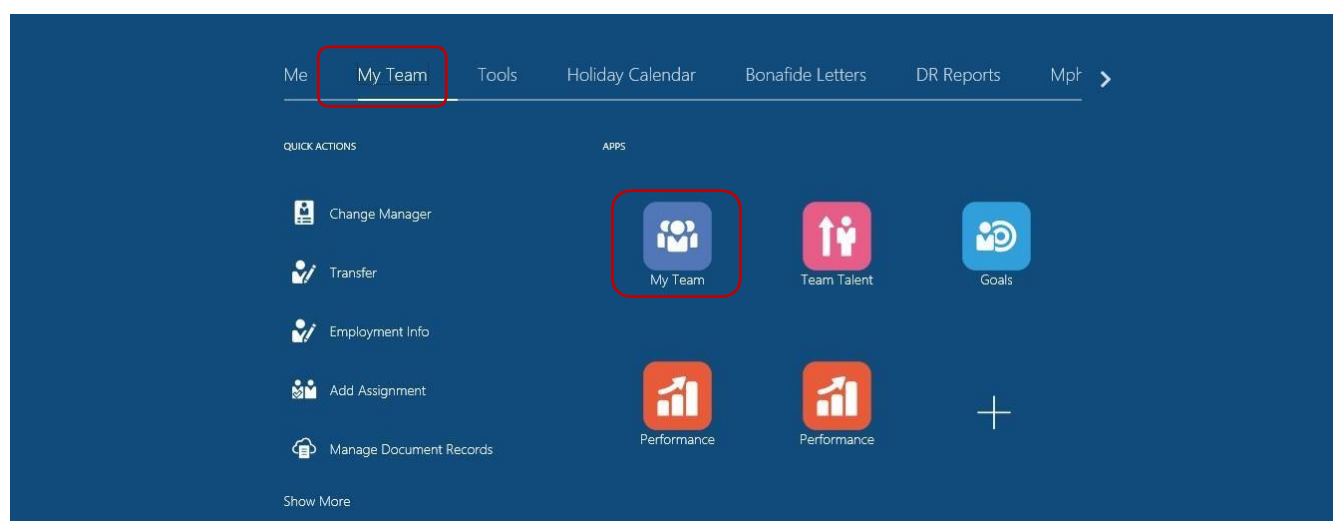
The Manager initiates termination of a particular employee. Click on Personal and employment and proceed for terminate option

Choose the appropriate reason and submit for termination
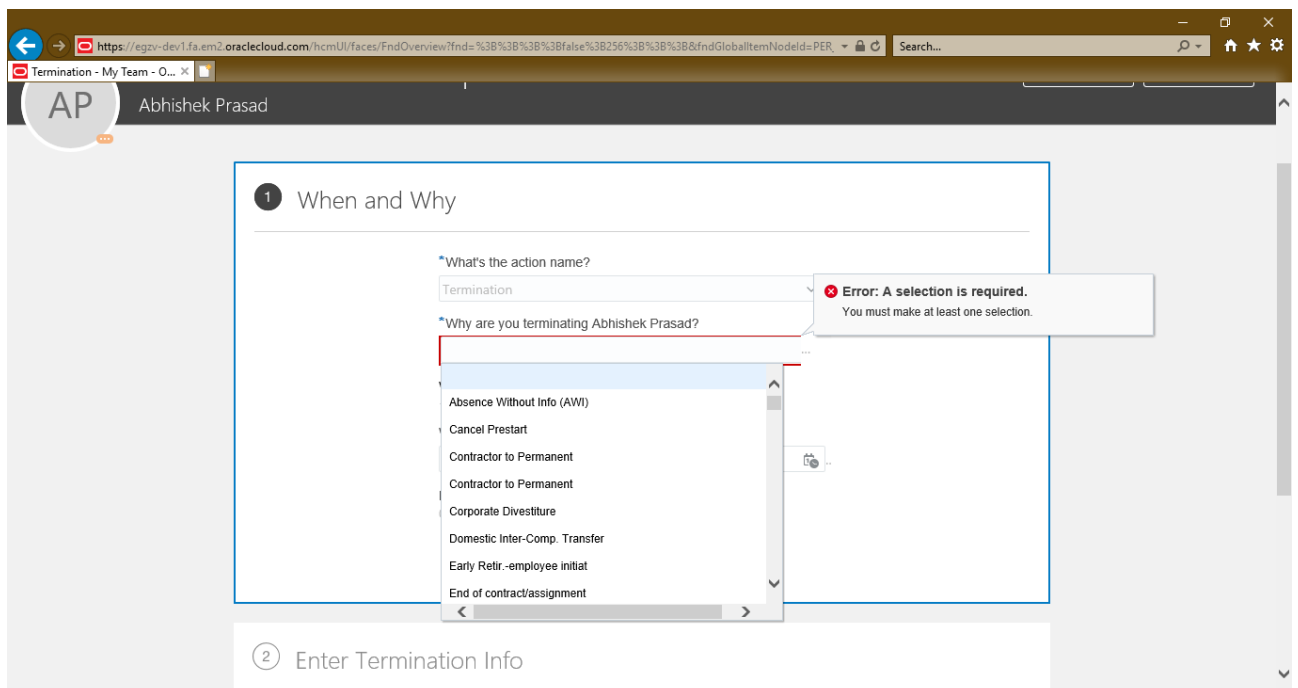
Change location

Manager can change the location of the employees reporting to him / her
Navigation: Home>My Team
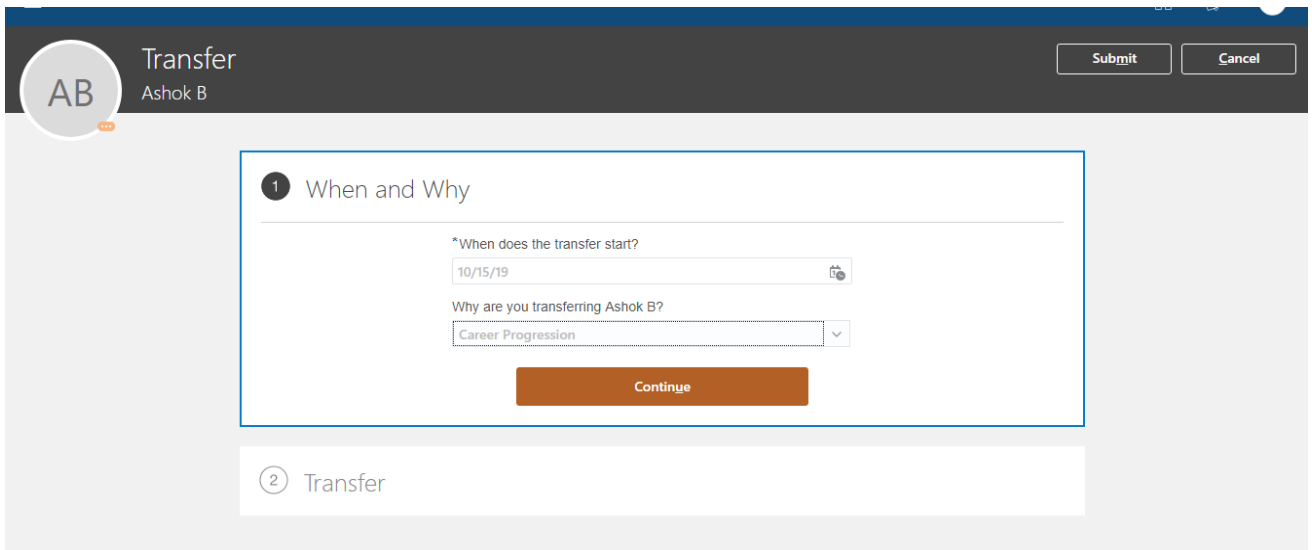
Click on My Team icon in My Team Tab

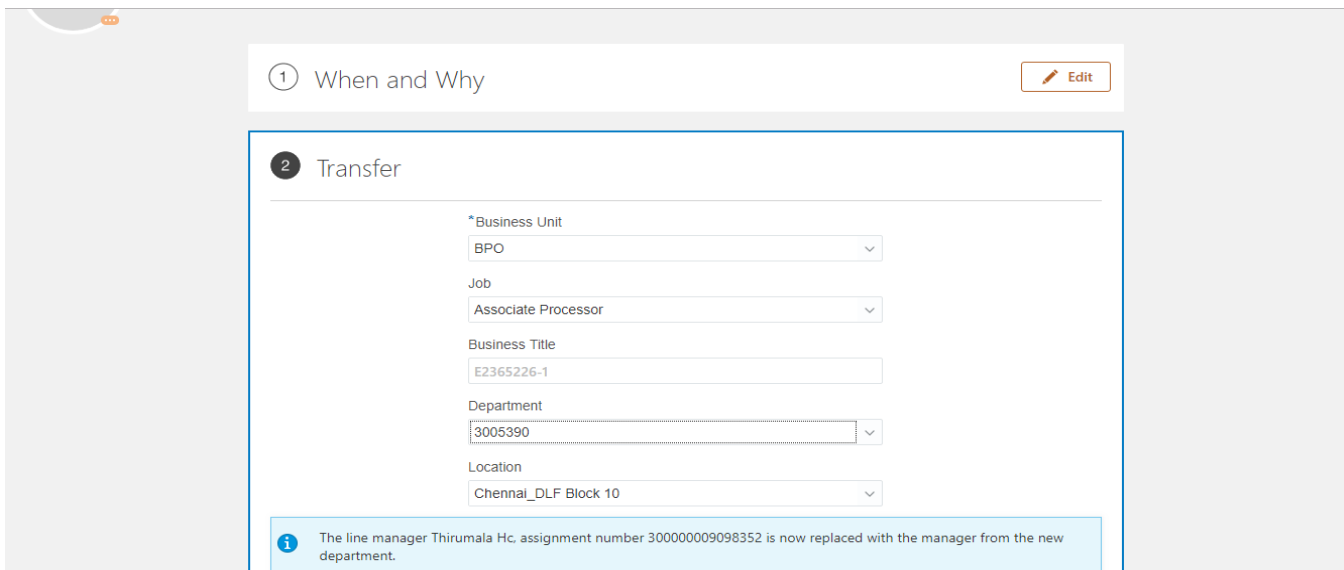Select change location from personal and employment in action menu (orange button)
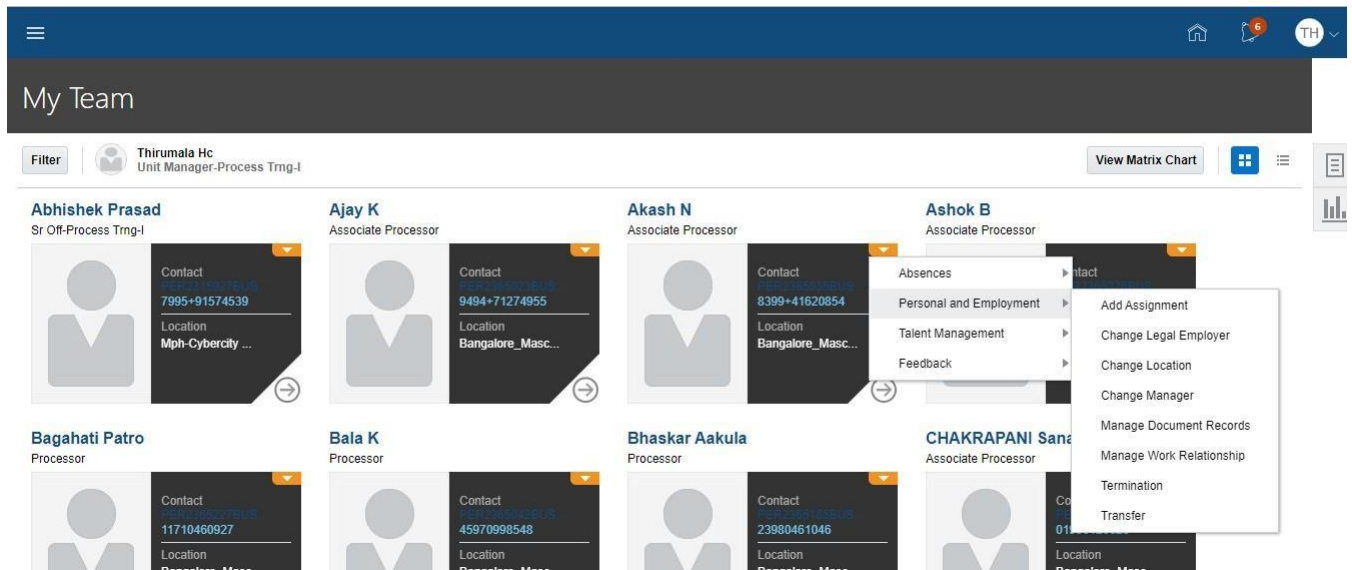
Indicate the date of transfer and reason for change

Change the location and then click submit

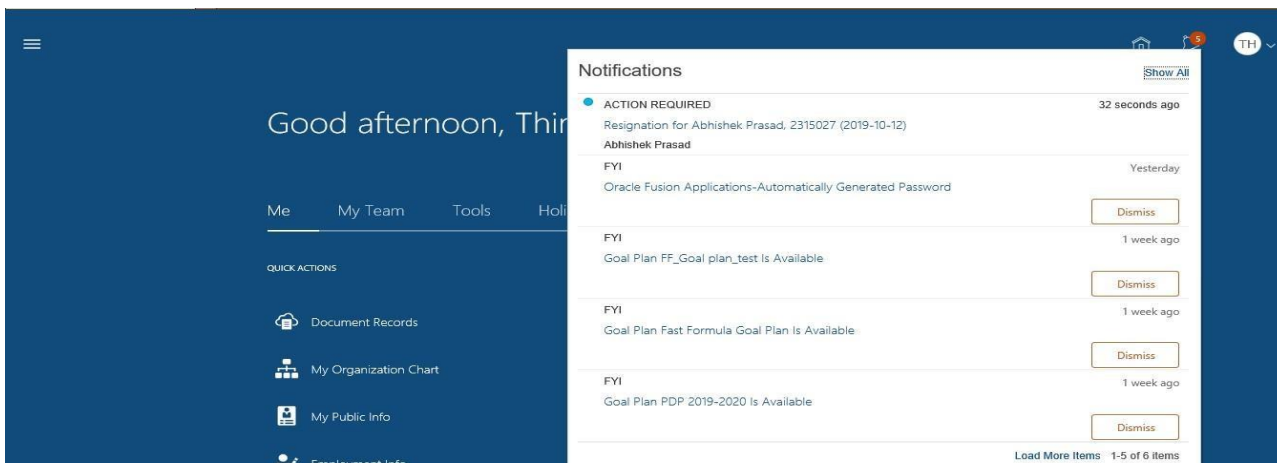Similar procedure has to be followed for transfer

4.3 Resignation

The Manager can choose to edit/approve/reject the resignation submitted by the employee
The following scenarios are possible during resignation process:

Resignation Approval: Once an employee has a discussion with Manager and submits the resignation, the Manager approves on the system

Withdrawal of resignation before approval: If the employee wishes to stay back after the resignation is submitted and is yet to be approved by the Manager, the Manager can reject the resignation.

Withdrawal of resignation after approval: After the employee's resignation is approved by the Manager, if the employee wishes to withdraw resignation, the withdrawal can be done by the Manager by doing 'Reverse termination' of the employee before Last working day.

If an employee submits resignation, the manager will get notification in the system. The Manager should click on the bell icon and proceed to the notification "Action Required" as shown below.

The manager has options to edit (change resignation date/ change reasons), approve or reject.

4.3.1 Edit option

The Manager can change the resignation date (last working date) of the employee

The Manager can change the below inputs

4.3.2 Withdrawal of resignation after approval
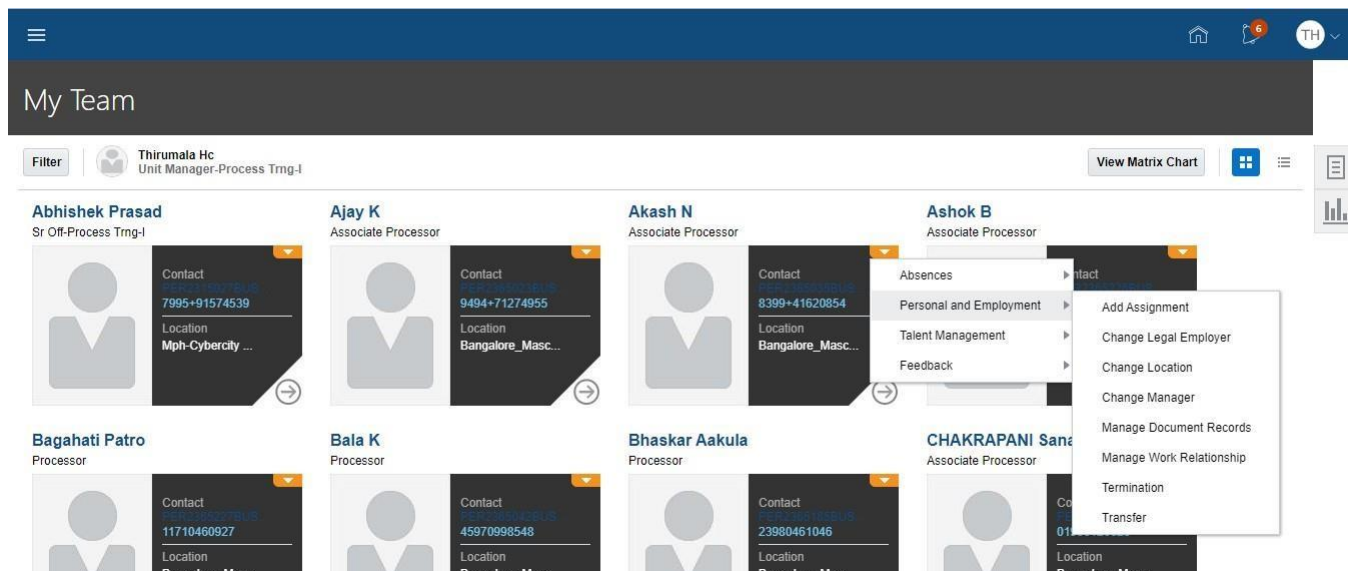
After the employee's resignation is approved by the Manager, if the employee wishes to withdraw resignation, the withdrawal can be done by 'Reverse termination' of the employee. Choose manage work relationship
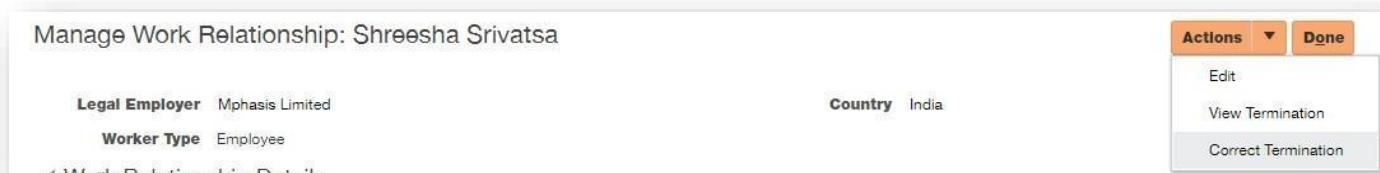
Navigation: Home>My Team

Click on My Team icon in My Team Tab
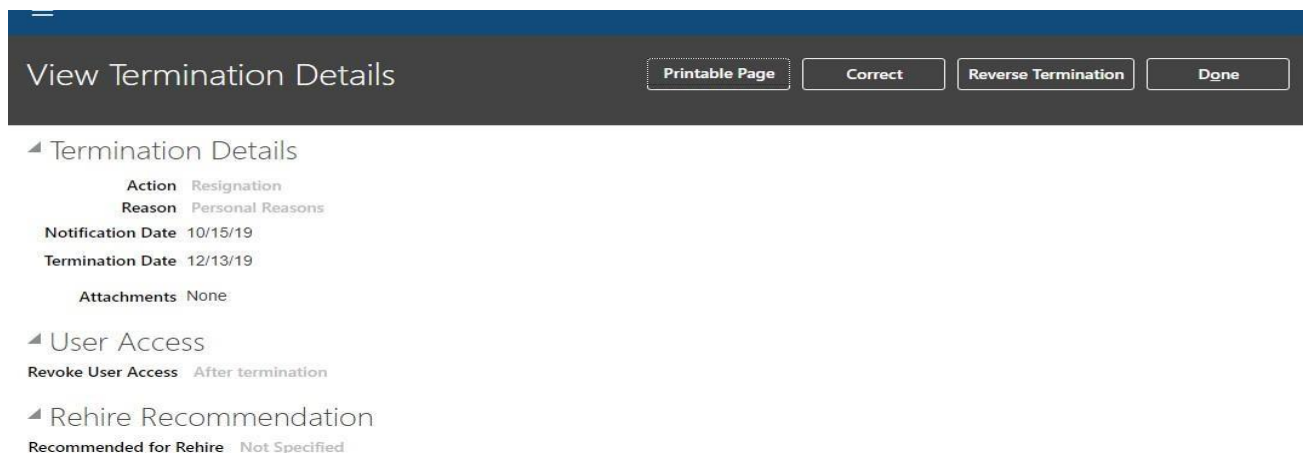
Select Manage Work Relationship

Click Action Button and choose "View Termination"

Select Reverse Termination

Click Ok
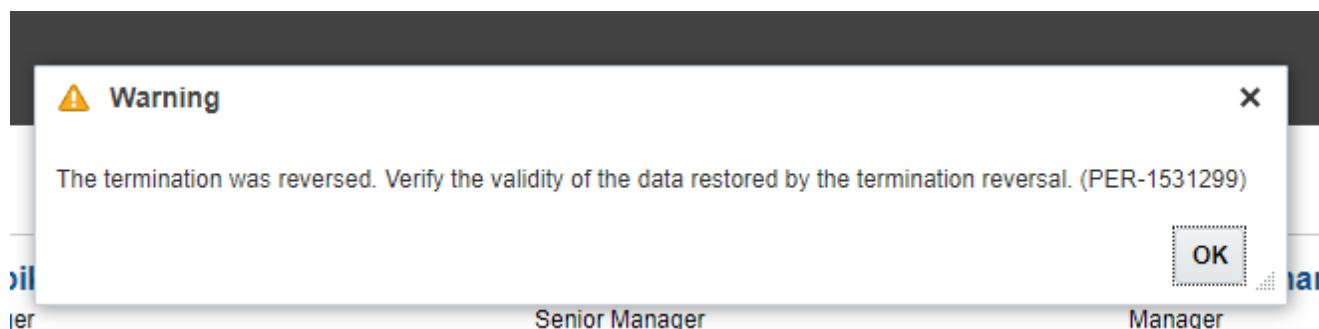
4.3.2 Withdrawal of resignation before approval:

If the employee wishes to stay back after the resignation is submitted and is yet to be approved by the Manager, the Manager can simply reject the approval. The Manager has to click the notification message and select Reject

4.4 Other options available for managers

The talent management and feedback option is covered in PMS Manual
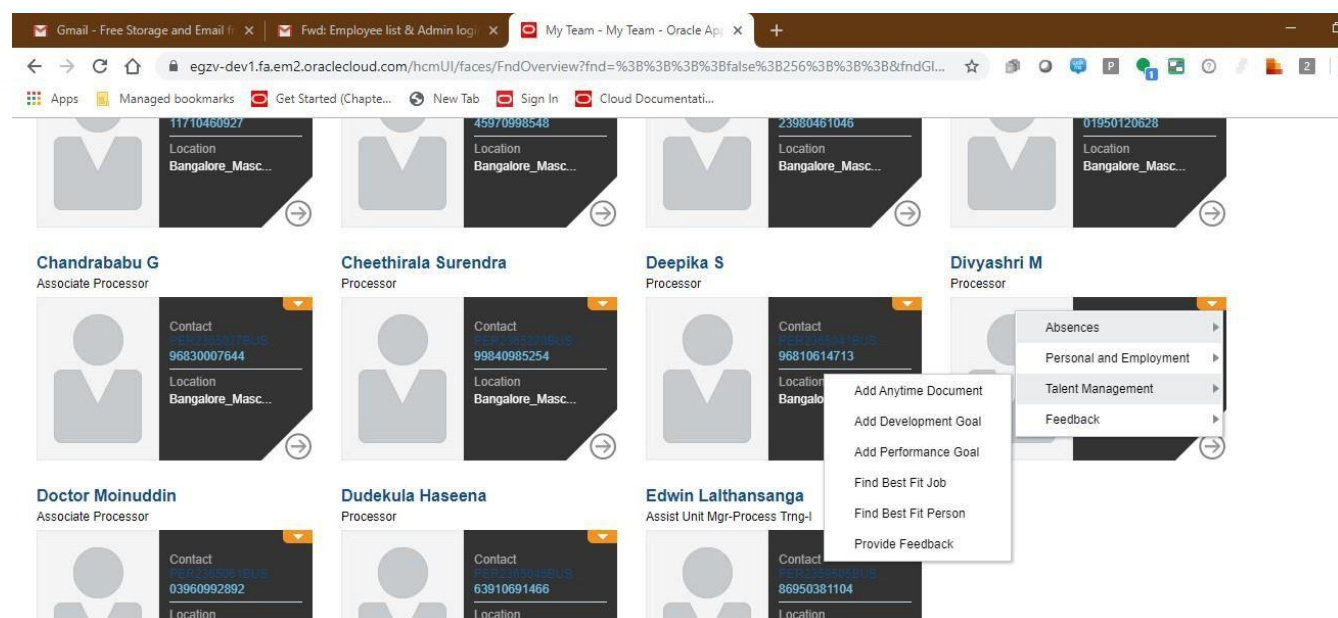
The Quick action link present on the left side allows access for the manager to manage employee work conditions who are directly reporting to him/her.

Manager can assign work, change location, initiate termination etc. as explained in 4.3 section
Manager can add goals and monitor performance of his/her team through goals and performance icon present in 'My Team' tab
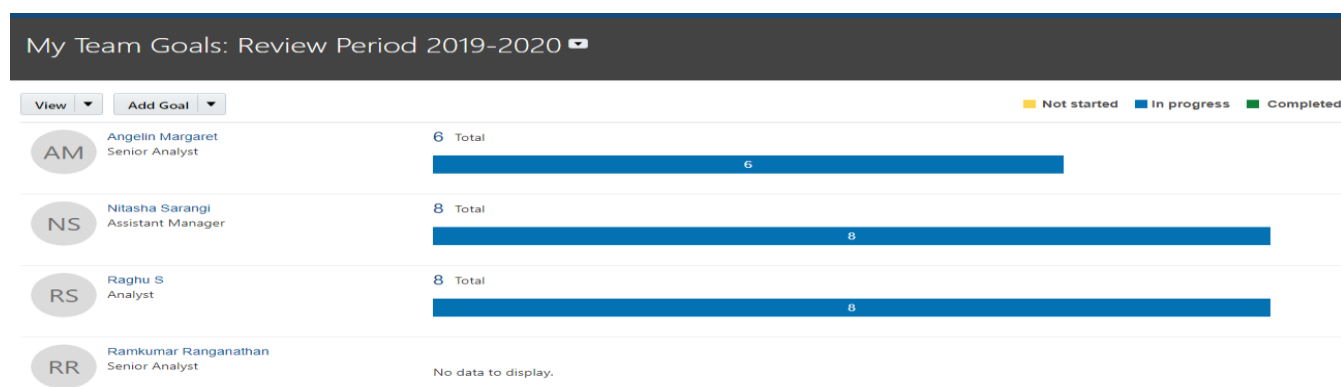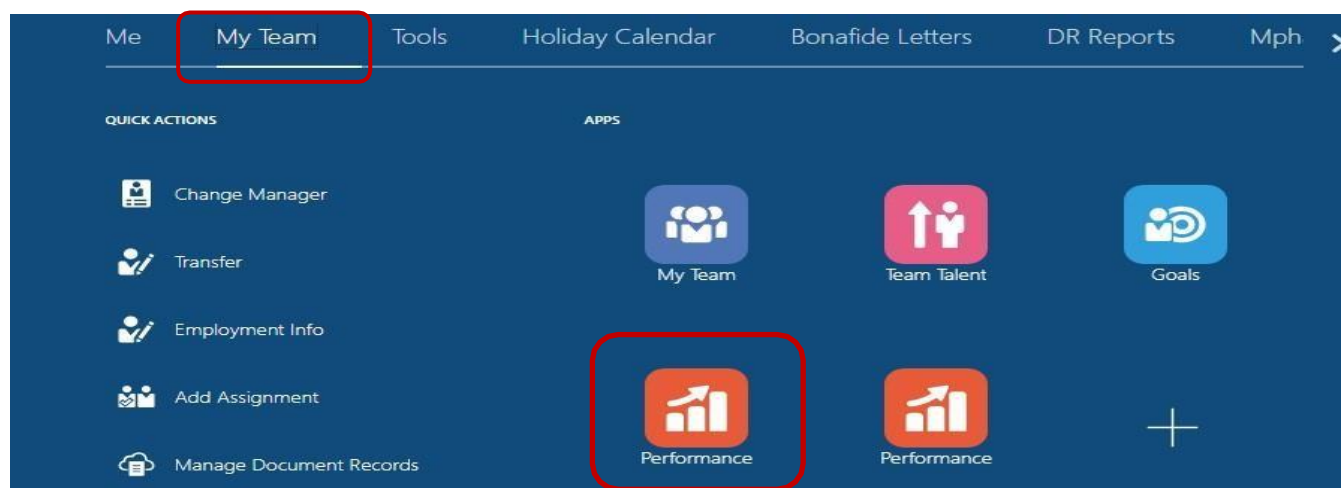
For detailed goal management, please refer PMS document
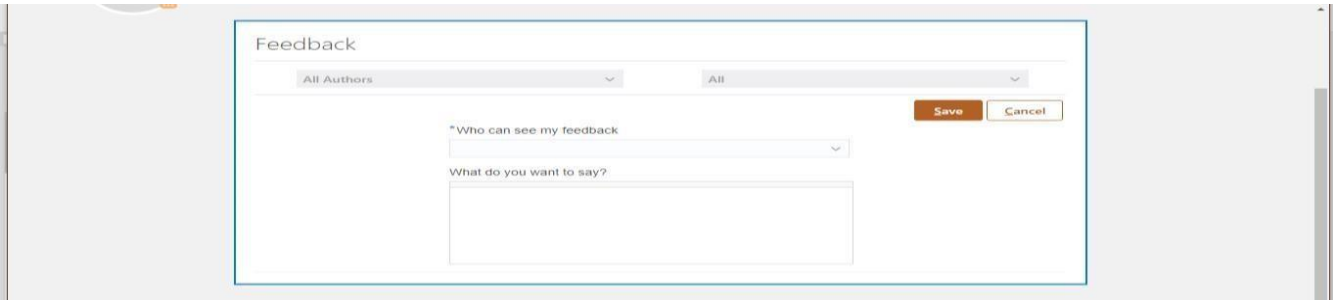
Click Show more in "My team" tab.
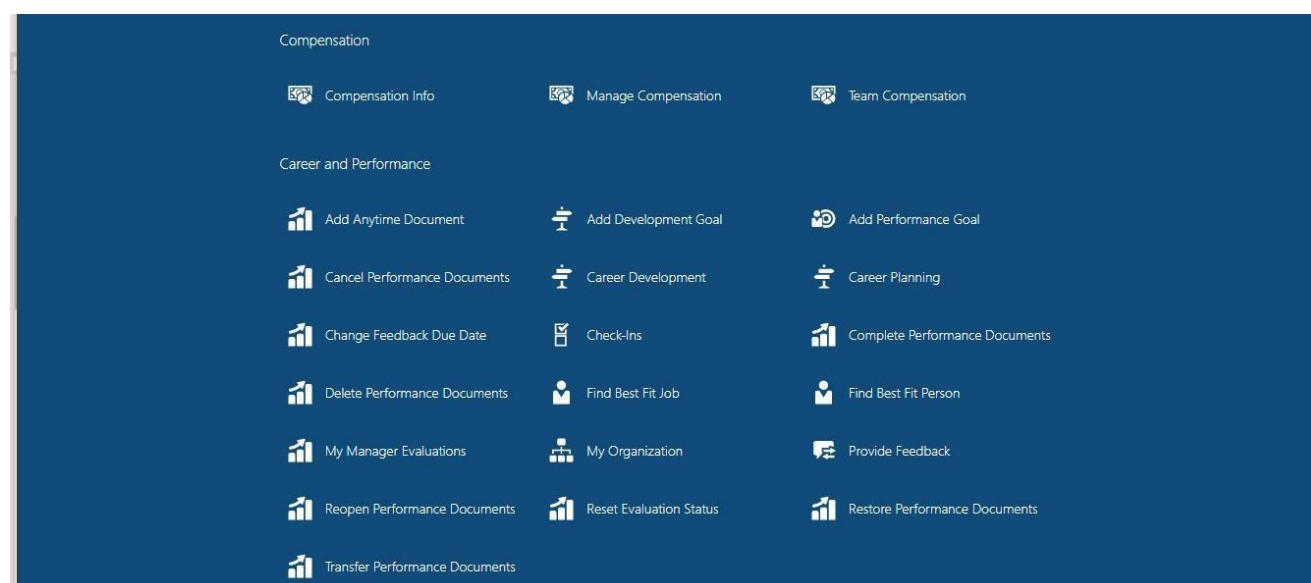
Managers can use the above options for PMS and compensation (for detailed usage, please refer the respective user manuals)

For eg: Manager can directly provide feedback of an employee directly reporting to him/her.

Manager should click the provide feedback icon and chose the employee from the list to give feedback. The manager will be directed as shown below:
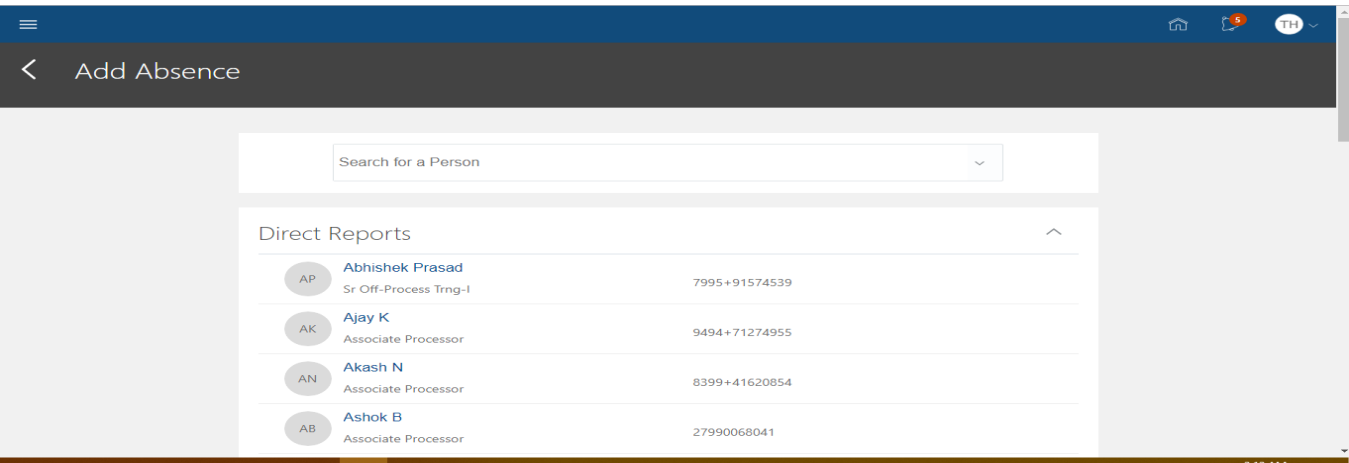
Manager can apply leave on behalf of employees directly reporting to him.

Navigation: Home> My team > Show more in Quick Action links

Select add Absence
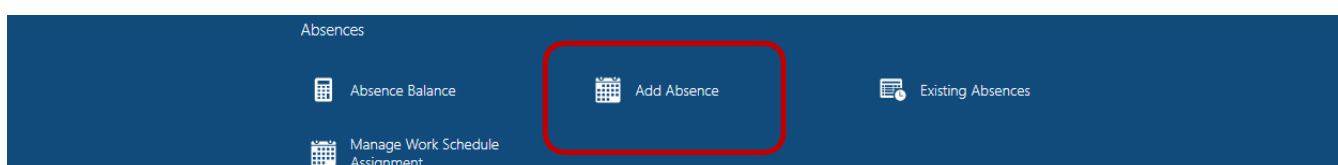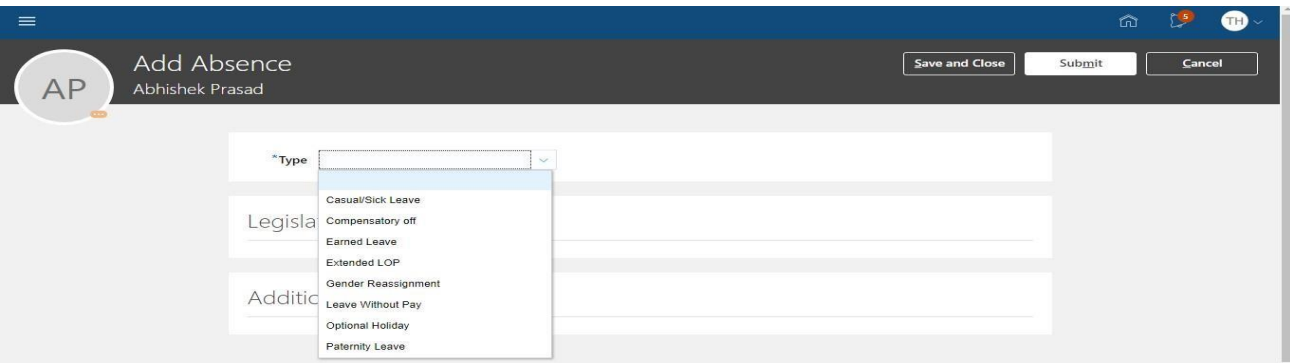
List of employees reporting to the manager is displayed. The manager should choose the employee to apply leave on their behalf

Leave type has to be selected and then click submit. Comments and attachments are added (optional)
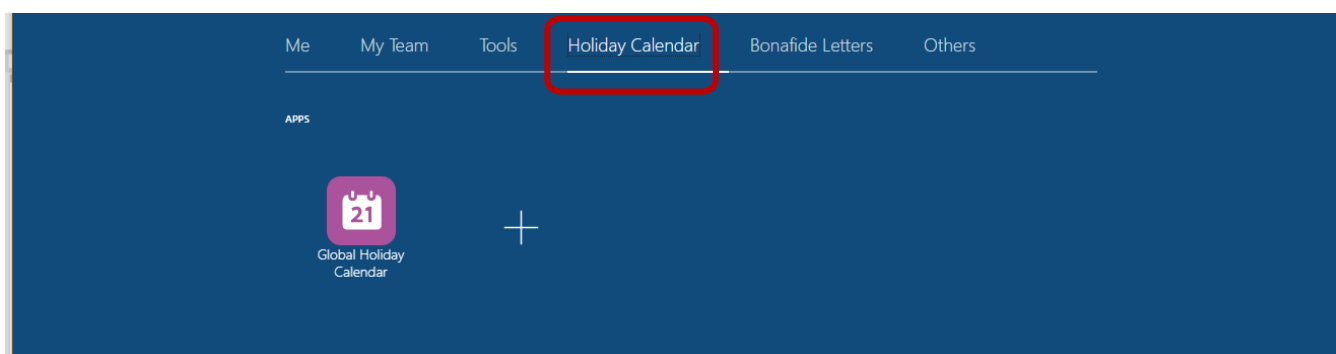
5. Icons in "Tools" tab
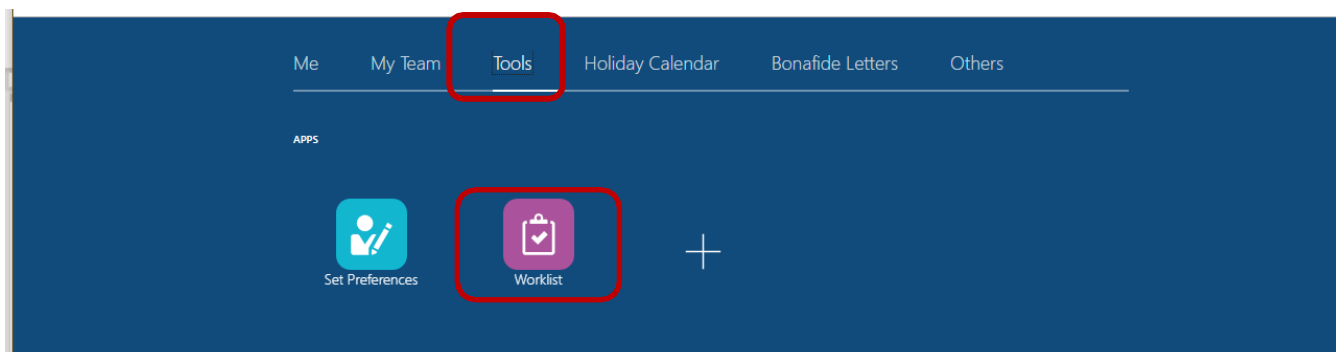
Worklist Allows employees to see updates from organization
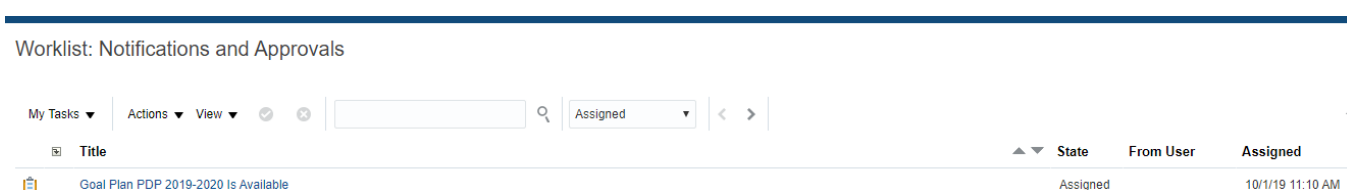
For Set Preferences, refer 8. Settings and Action
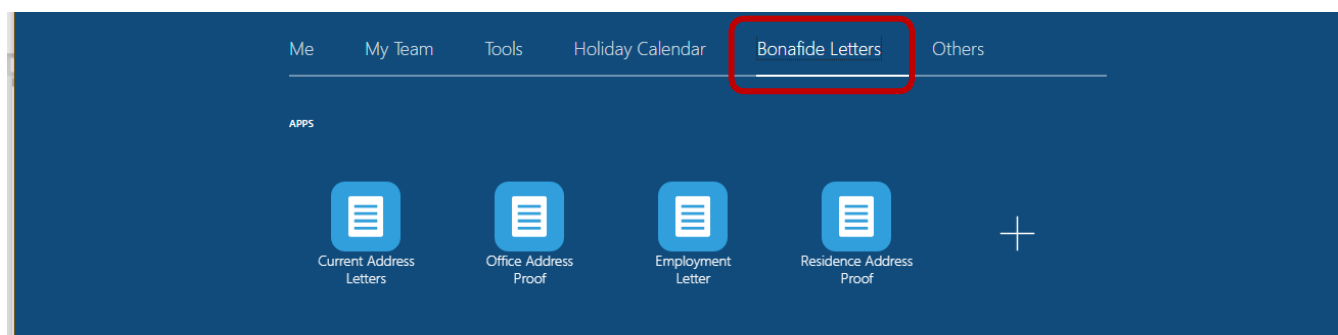
6. Icons in "Holiday calendar" Tab

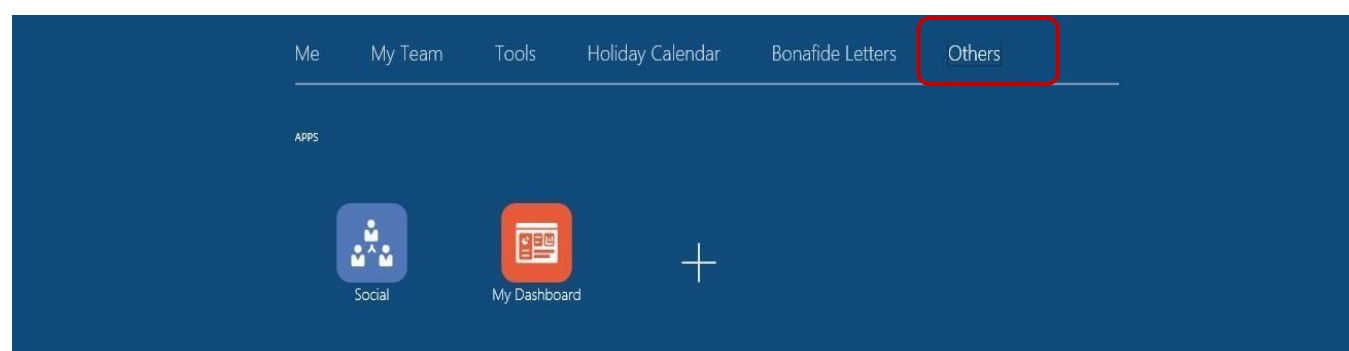Employees can access global calendar by clicking the above icon. Excel file gets downloaded.

7. Icons to access various documents
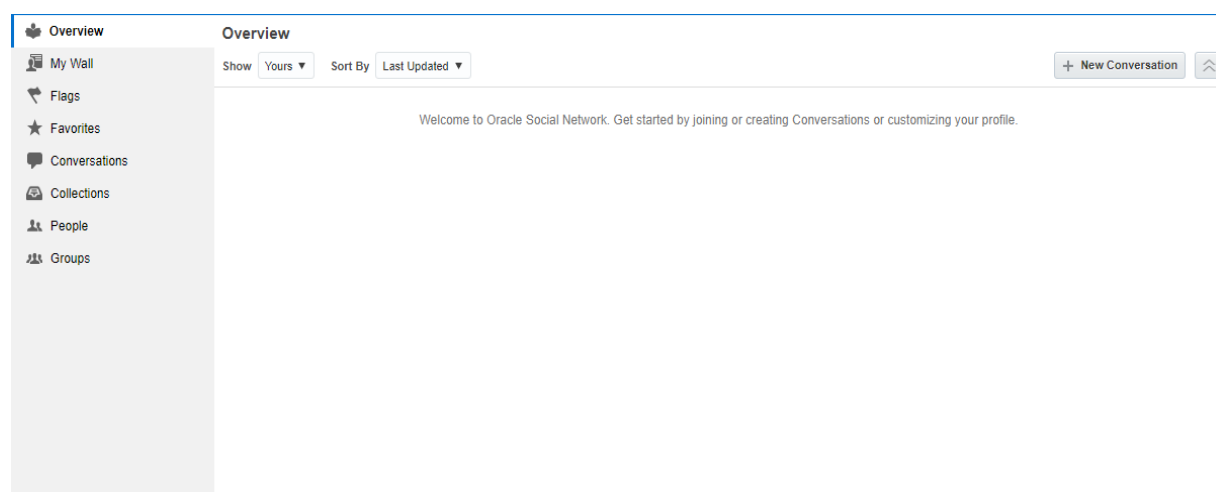
Important Documents can be downloaded from this tab

7. Icons in "Others" tab

Clicking on the above icon leads to home page:
Employee can use the social icon for internal networking and knowledge sharing. My dashboard takes the user to home page.
Clicking on the social icon leads to the following page:

8. Settings and Action

User Can set their preferences – like date format, currency, territory (in case of transfer/project relocation) and update their photos in "set preferences"

Click on the profile icon in home page and then go for set preferences
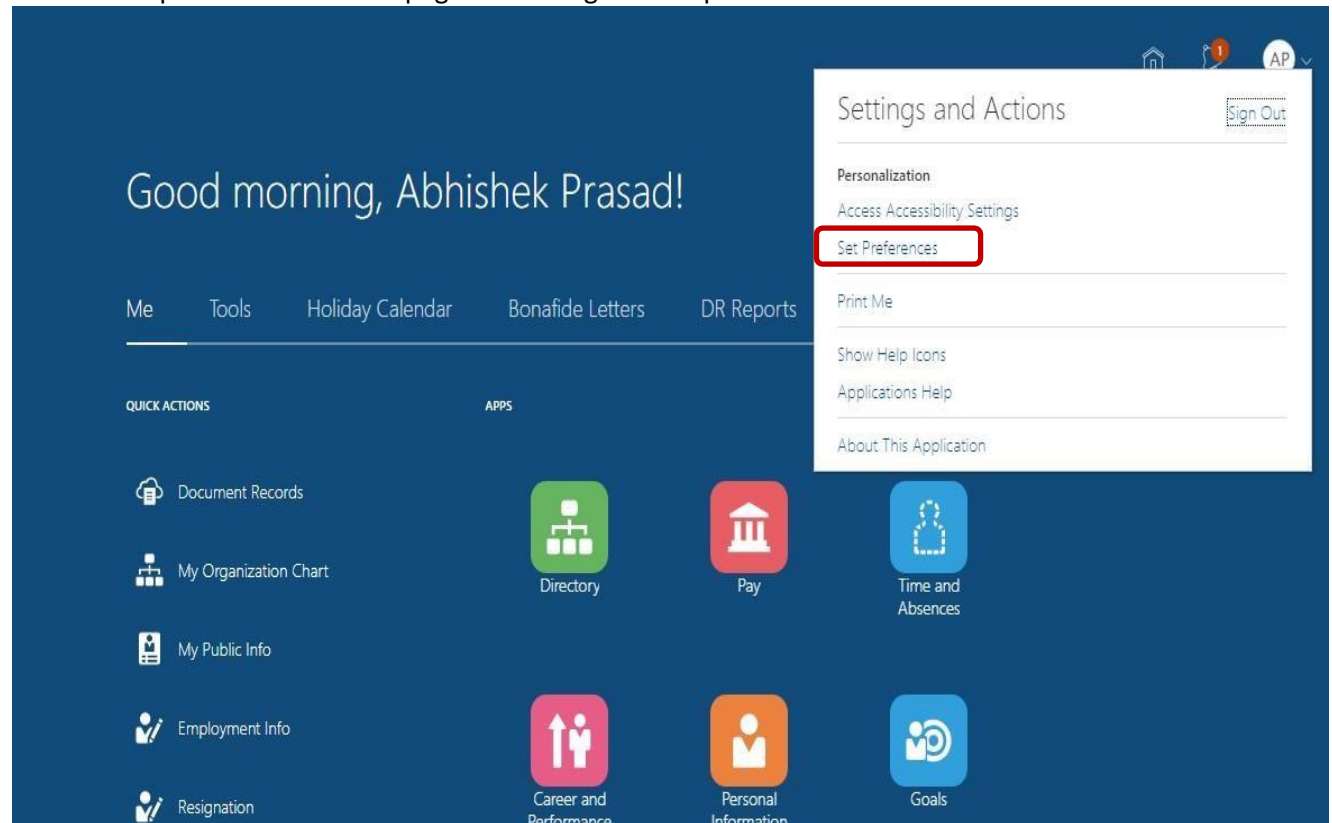
Click on regional to change territory, currency etc and the following page will appear:

Photos and general settings (font, color) can be changed

General Preferences: Accessibility

Save | Save and Close | Cancel

Accessibility ◉ Default Mode
○ Screen Reader

Color Contrast ◉ Standard
○ High

Font Size ○ Large
◉ Medium

Thank You