

EMPLOYEE SELF SERVICEPORTAL
USER MANUAL

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Prepared for:



YEAR: 2024

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USER GUIDE

ESS portal contains activities that an employee can self – subscribe to. An employee must login to access the available activities.

FIRST TIME SIGN IN

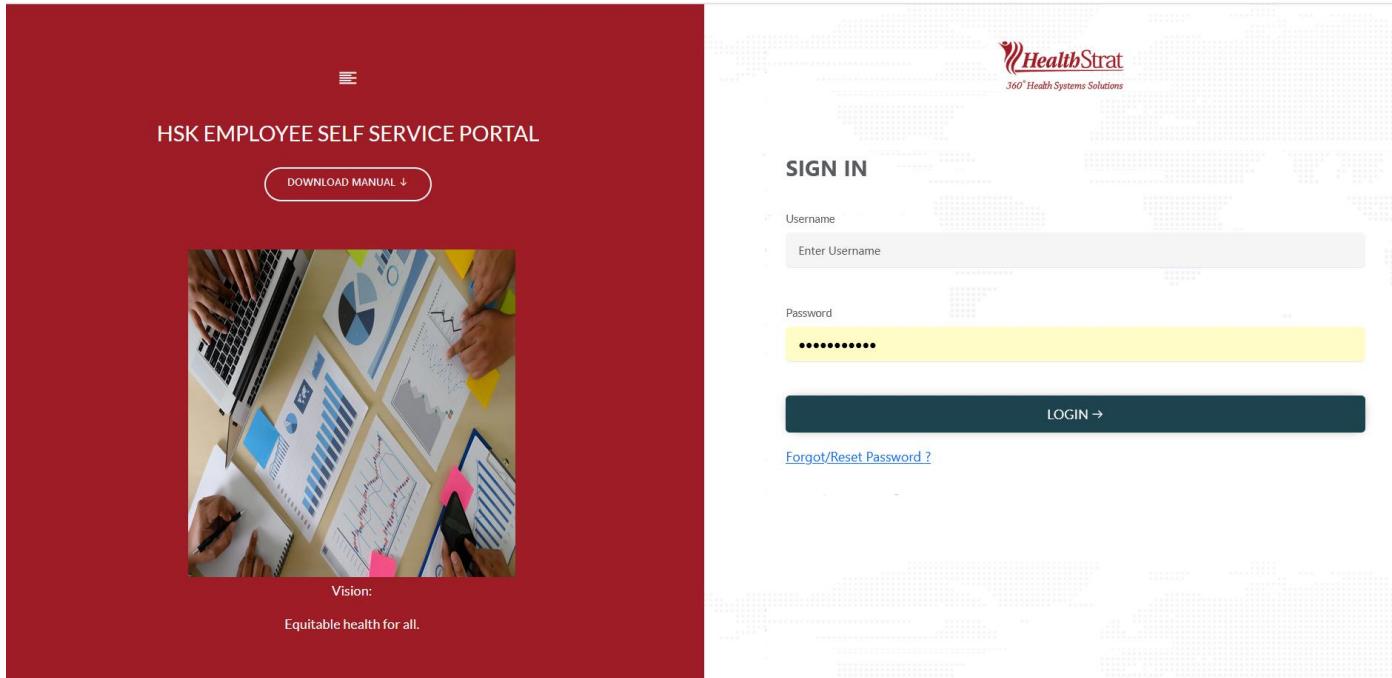


Fig 1: Login Page

The ESS portal can be accessed using the link: <https://ess.healthstrat.co.ke>

- I. Upon accessing the link, one is prompted to log in.
- II. For first-time users who have not accessed the ESS Portal before:
- III. Click on Forgot/Reset password.
- IV. then enter your user ID/Username e.g. (HSK\JDOE) and submit.
- V. You will get an email with an OTP used to set your password.

NOTE: The default Username will be derived from your previous login credentials.

LOGIN PROCESS AND HOMEPAGE

To login, enter Username and Password then click Login.

Upon successful login, you will see a homepage which consists of a dashboard and a menu bar. The menu shows all the services in the portal, that is:

Human resource

Finance

Procurement

Transport

Performance Management

Reports

Approvals

A summary of your profile will also be displayed on the dashboard as shown in

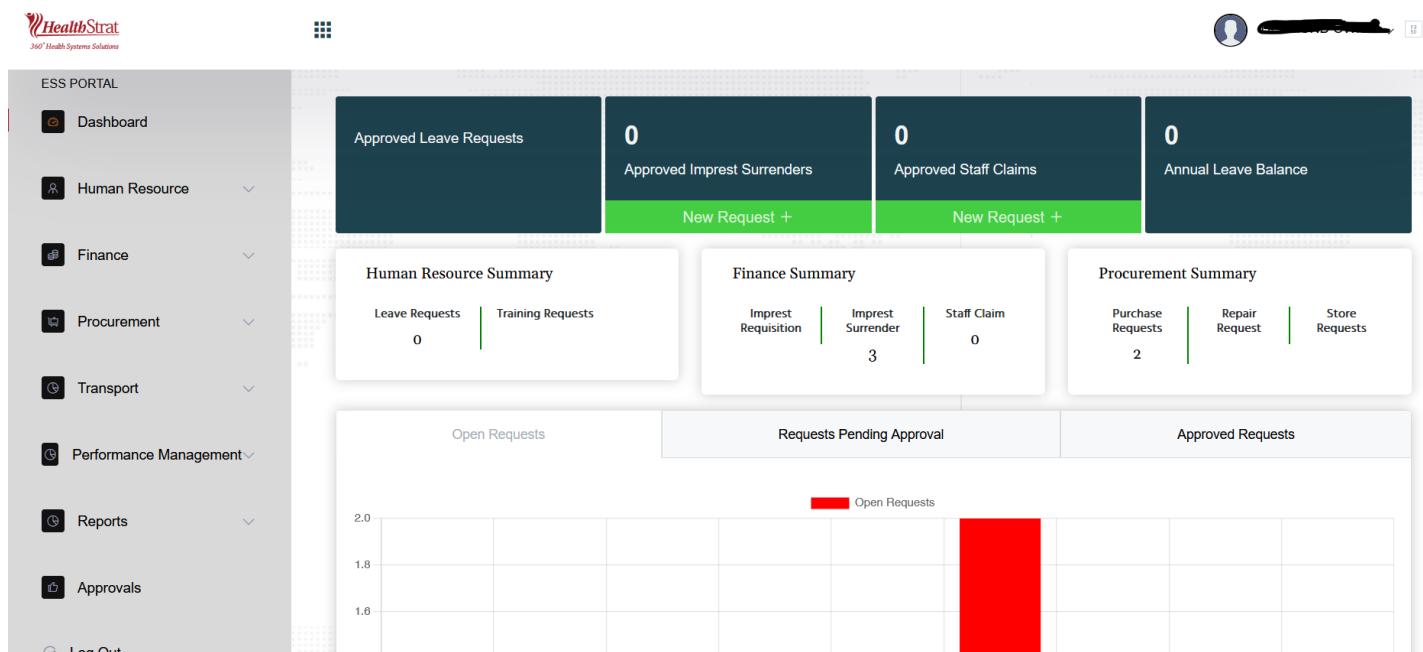


Fig 2: Dashboard

NAVIGATION

The Side menu Can be opened by hovering the mouse and clicking individual modules to open for more options.

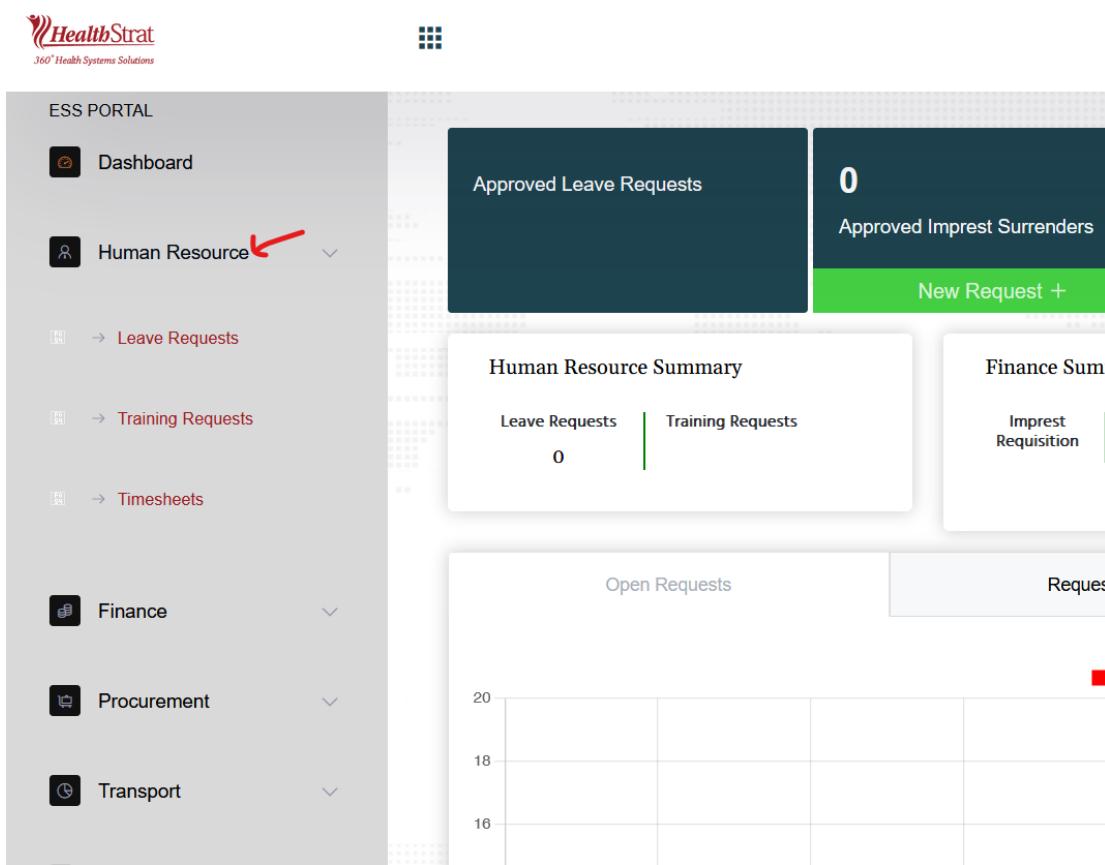


Fig 3: Side Menu

Each module opens to a different page as shown in the below image.

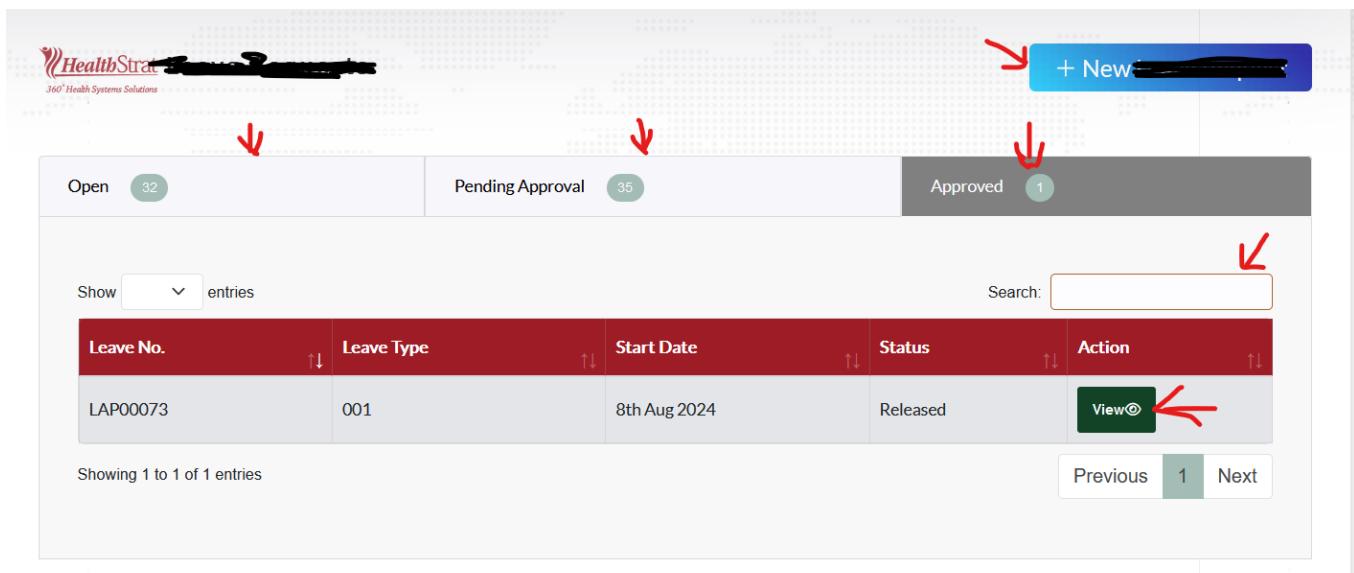
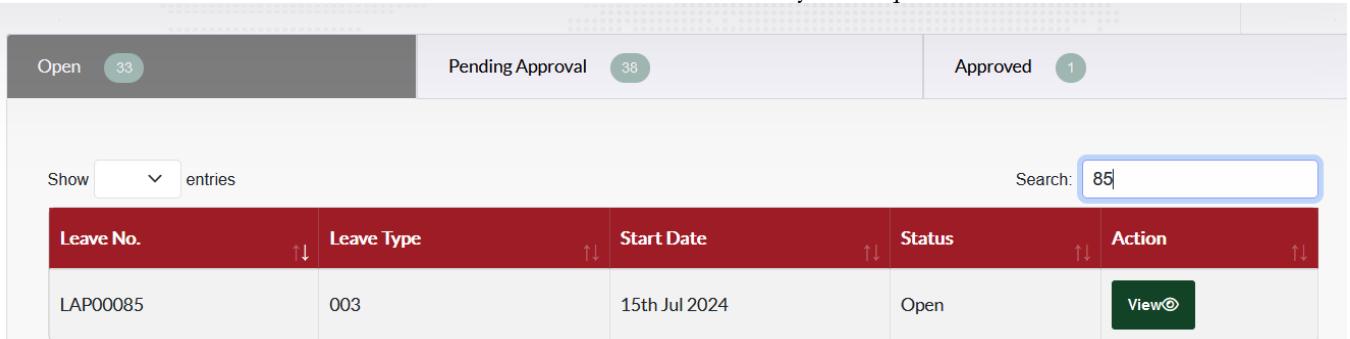


Fig 4: Sample request window

New – When clicked creates a new Request and opens to the editing window.
Open – Shows the number of Open Requests that have not been sent for Approval.

Pending Approval – Shows all Request Pending Approval.

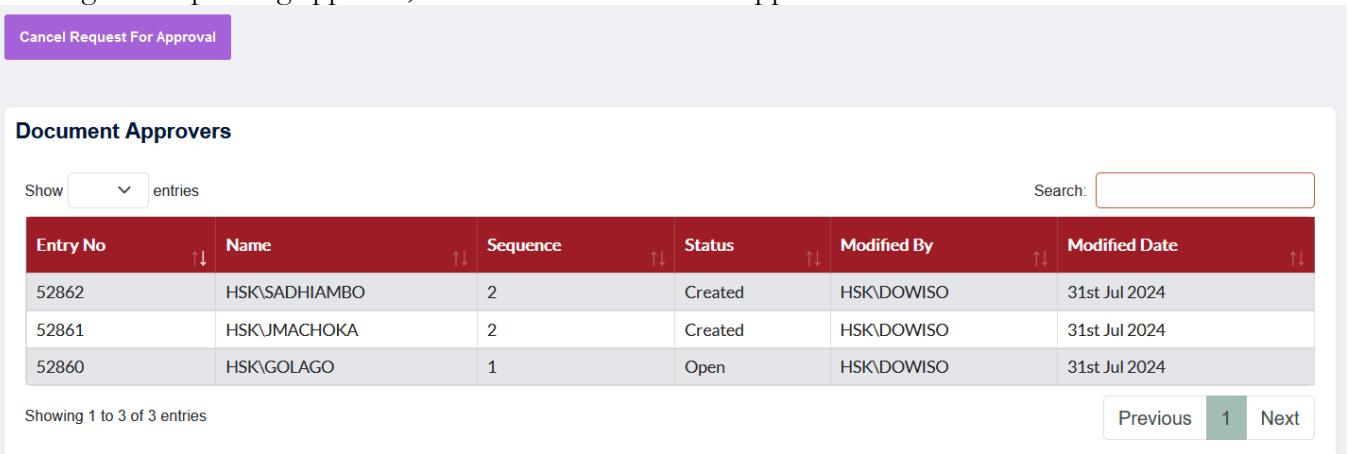
Search – The search bar allows Users to search from a list of all your requests.



Leave No.	Leave Type	Start Date	Status	Action
LAP00085	003	15th Jul 2024	Open	<button>View</button>

Fig 5: Search Image

View – View Opens the details of the Request and can only be editable under **New** and **Open** Viewing Under pending approval, Users can see the List of Approvers as shown below.



Entry No	Name	Sequence	Status	Modified By	Modified Date
52862	HSK\SADHIAMBO	2	Created	HSK\DOWNISO	31st Jul 2024
52861	HSK\UMACHOKA	2	Created	HSK\DOWNISO	31st Jul 2024
52860	HSK\GOLAGO	1	Open	HSK\DOWNISO	31st Jul 2024

Fig 6: List of approvers

Cancel Approval Request – There is also an approval cancellation button for users to cancel their Approval Requests.

Approved - Shows all Approved Requests.

FINANCE

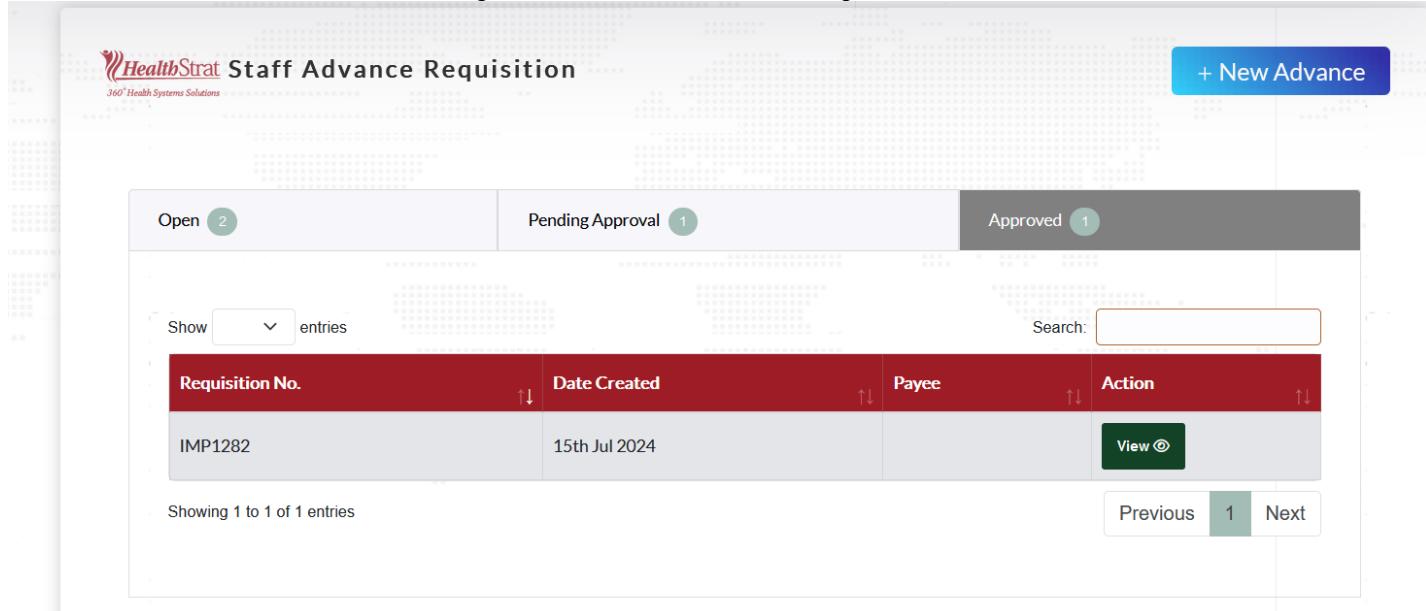
This section contains activities done at Finance level. They include:

1. Staff advance requisition
2. Staff advance surrender
3. Staff Claim

Staff advance requisition

To raise a new Staff advance requisition, go to:

➤ Finance >> Staff advance Requisition >> New advance request



The screenshot shows a list of staff advance requisitions. The top navigation bar includes the HealthStrat logo and a '+ New Advance' button. The list is filtered to show 'Open' (2) and 'Pending Approval' (1) entries. The table columns are Requisition No., Date Created, Payee, and Action. A single entry is visible: Requisition No. IMP1282, Date Created 15th Jul 2024, and Action 'View'.

Requisition No.	Date Created	Payee	Action
IMP1282	15th Jul 2024		View

Fig 7: New Advance Creation

New Advance X

Grant* <input style="width: 100%;" type="text" value="--Select Grant --"/>	Activity * <input style="width: 100%;" type="text" value="--Select Activity--"/>
Aim * <input style="width: 100%;" type="text" value="--Select Aim--"/>	Responsbility Center * <input style="width: 100%;" type="text" value="--Select Responsbility Center --"/>
Staff * <input style="width: 100%;" type="text" value="--Select Staff --"/>	Currency(Optional) <input style="width: 100%;" type="text" value="--Select currency--"/>
Purpose * <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>	
SUBMIT →	

Showing 1 to 2 of 2 entries

Fig 8: New advance creation details filling

- Once you submit,
- Click on add Imprest lines

[Home](#) / Pending Imprest / TV0106

UPLOAD ATTACHMENT
 + ADD IMPREST LINES

Imprest Status: Pending	Imprest Amount: 14000	Payment Due Date: 2024-03-13
-------------------------	-----------------------	------------------------------

Details

Date Inserted	Account No	Responsbility Center	Payee
2024-03-13	TRL_HS285	AIDS_FREE	OMBEGO EDWIN GISORE

purpose

TEST

Imprest Requisitions Lines

Fig 9: Imprest line addition and file upload

New Purchase Requisition Line X

Type	Requisition Item
--Select--	<input type="text" value=" "/> >>>>> 12c8180e05b4019e61892ce780bc9f367ce7b2ee
Amount *	Quantity *
<input type="text"/>	<input type="text"/>
Grant*	Activity *
<input type="text"/>	<input type="text"/>
Aim *	Staff *
<input type="text"/>	<input type="text"/>
SUBMIT →	

Fig 10: Lines addition

- Once you fill in the lines and submit. Kindly note that you can add as many attachments as you'd like.
- Attach the necessary documents

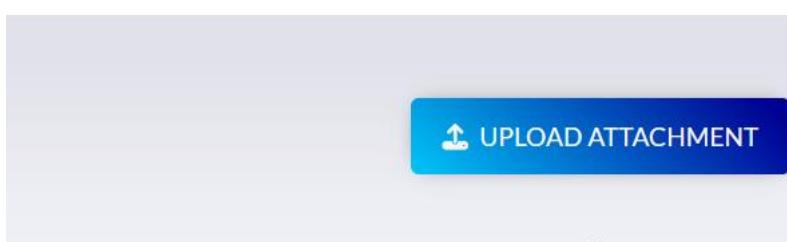


Fig 11: Document Upload

Imprest Status: Pending Imprest Amount: 14000 Payment Due Date: 2024-03-13

Details			
Date Inserted	Account No	Responsibility Center	Payee
2024-03-13	TRL_HS285	AIDS_FREE	OMBEGO EDWIN GISORE
purpose			
TEST			

Imprest Requisitions Lines

My Attachments

Request For Approval

Fig 12: Document Upload

- In case you want to view the requisition lines or the attachments, click on the + action
- The last step is: Send the request for approval action. You will get an email notification to confirm that your request is undergoing the approval process

Staff advance Surrender

To raise a Staff advance Surrender, go to:

- Staff advance Surrender >> + New Advance Surrender

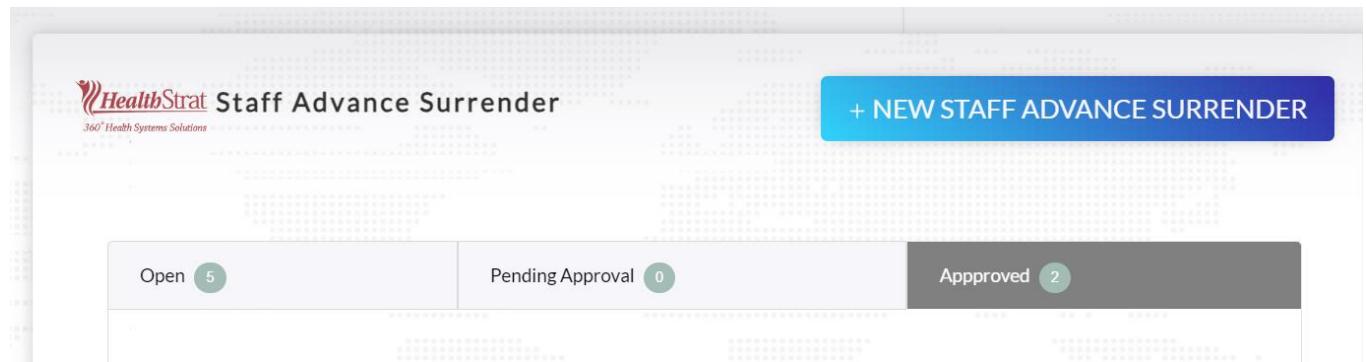


Fig 13: New Surrender Creation

- A window to select Imprest document to surrender will appear, select the document to surrender then click **submit**

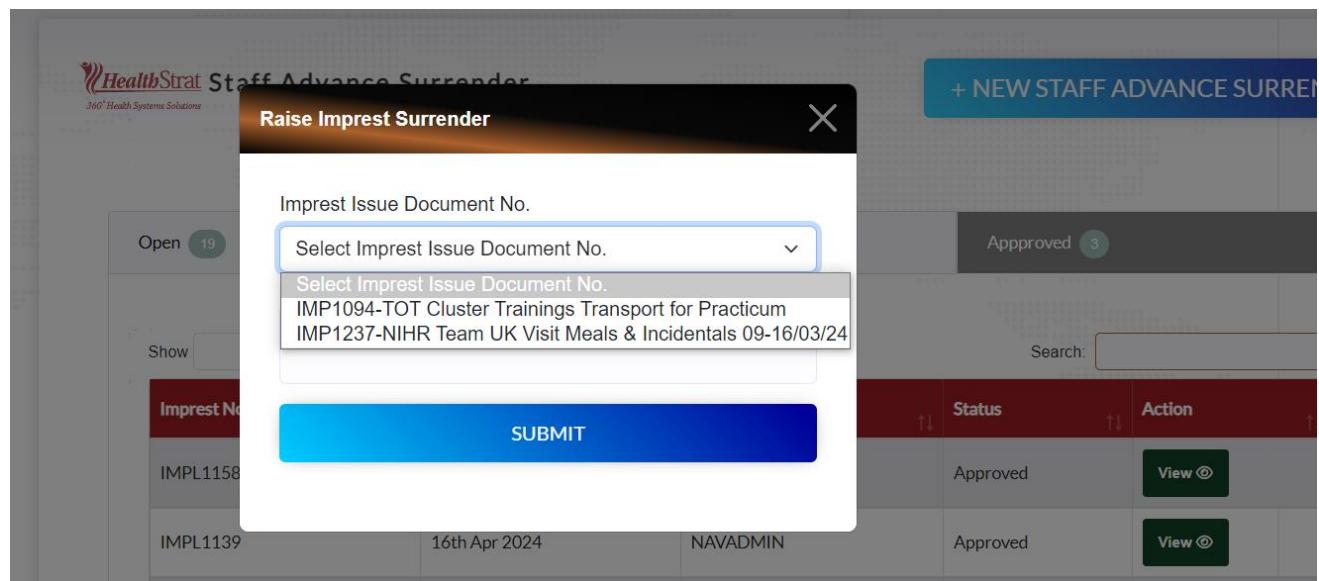
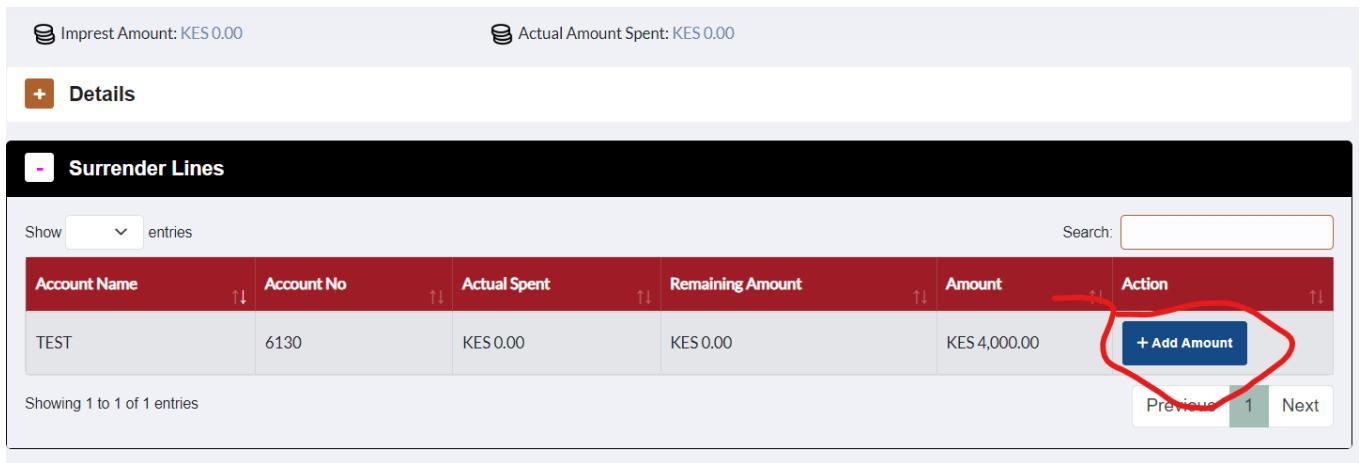


Fig 14: Surrender Document selection

- Once you click submit, you will see the page below where you will click ‘add amount’ to add the actual amount spent.



Imprest Amount: KES 0.00 Actual Amount Spent: KES 0.00

Details

Surrender Lines

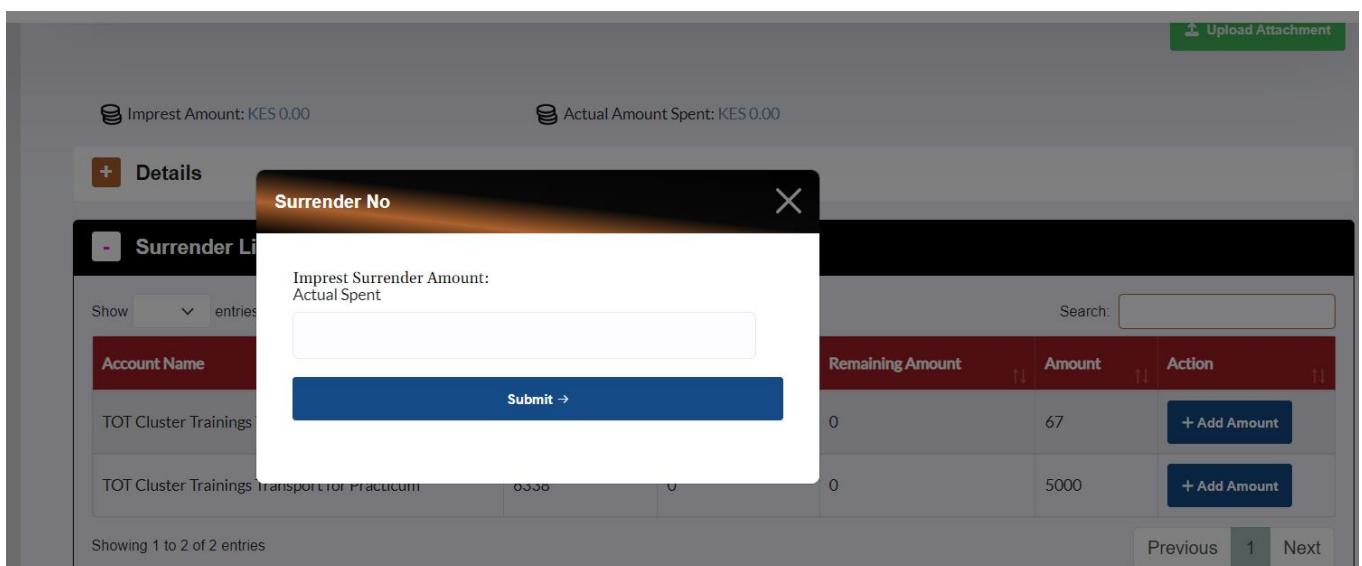
Show entries Search:

Account Name	Account No	Actual Spent	Remaining Amount	Amount	Action
TEST	6130	KES 0.00	KES 0.00	KES 4,000.00	+ Add Amount

Showing 1 to 1 of 1 entries Previous 1 Next

Fig 15: Amount spent addition

- Add the amount spent and submit



Imprest Amount: KES 0.00 Actual Amount Spent: KES 0.00

Details

Surrender Lines

Show entries Search:

Surrender No

Imprest Surrender Amount: Actual Spent

Submit →

Remaining Amount	Amount	Action
0	67	+ Add Amount
0	5000	+ Add Amount

Showing 1 to 2 of 2 entries Previous 1 Next

Fig 16: Add Amount

- Once you add the amount, upload the relevant attachments/receipts

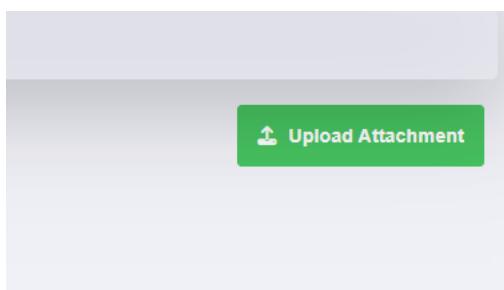
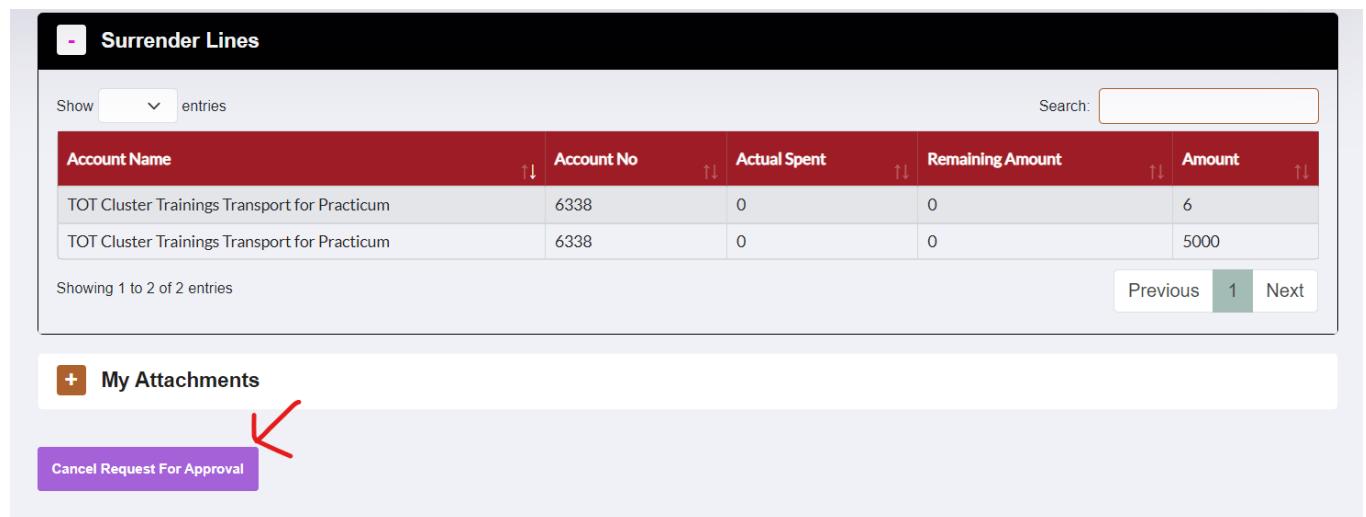


Fig 17: Document Upload

- Confirm if the attachments are uploaded then send the documents for approval
- You can cancel Approval Request to make amendments



The screenshot shows a web-based application interface for managing financial surrender lines. At the top, there is a header with a logo and the title 'Surrender Lines'. Below the header, there is a search bar with a placeholder 'Search:' and a dropdown menu for selecting the number of entries to display. The main content area contains a table with the following columns: Account Name, Account No, Actual Spent, Remaining Amount, and Amount. The table displays two entries, both of which are 'TOT Cluster Trainings Transport for Practicum' with account numbers 6338. The first entry has an 'Actual Spent' of 0, a 'Remaining Amount' of 0, and an 'Amount' of 6. The second entry has an 'Actual Spent' of 0, a 'Remaining Amount' of 0, and an 'Amount' of 5000. Below the table, a message indicates 'Showing 1 to 2 of 2 entries'. At the bottom of the page, there are navigation buttons for 'Previous', '1' (highlighted in green), and 'Next'. Below the table, there is a section titled 'My Attachments' with a purple button labeled 'Cancel Request For Approval'. A red arrow points to this button, indicating the action to be taken.

Account Name	Account No	Actual Spent	Remaining Amount	Amount
TOT Cluster Trainings Transport for Practicum	6338	0	0	6
TOT Cluster Trainings Transport for Practicum	6338	0	0	5000

Showing 1 to 2 of 2 entries

Previous 1 Next

My Attachments

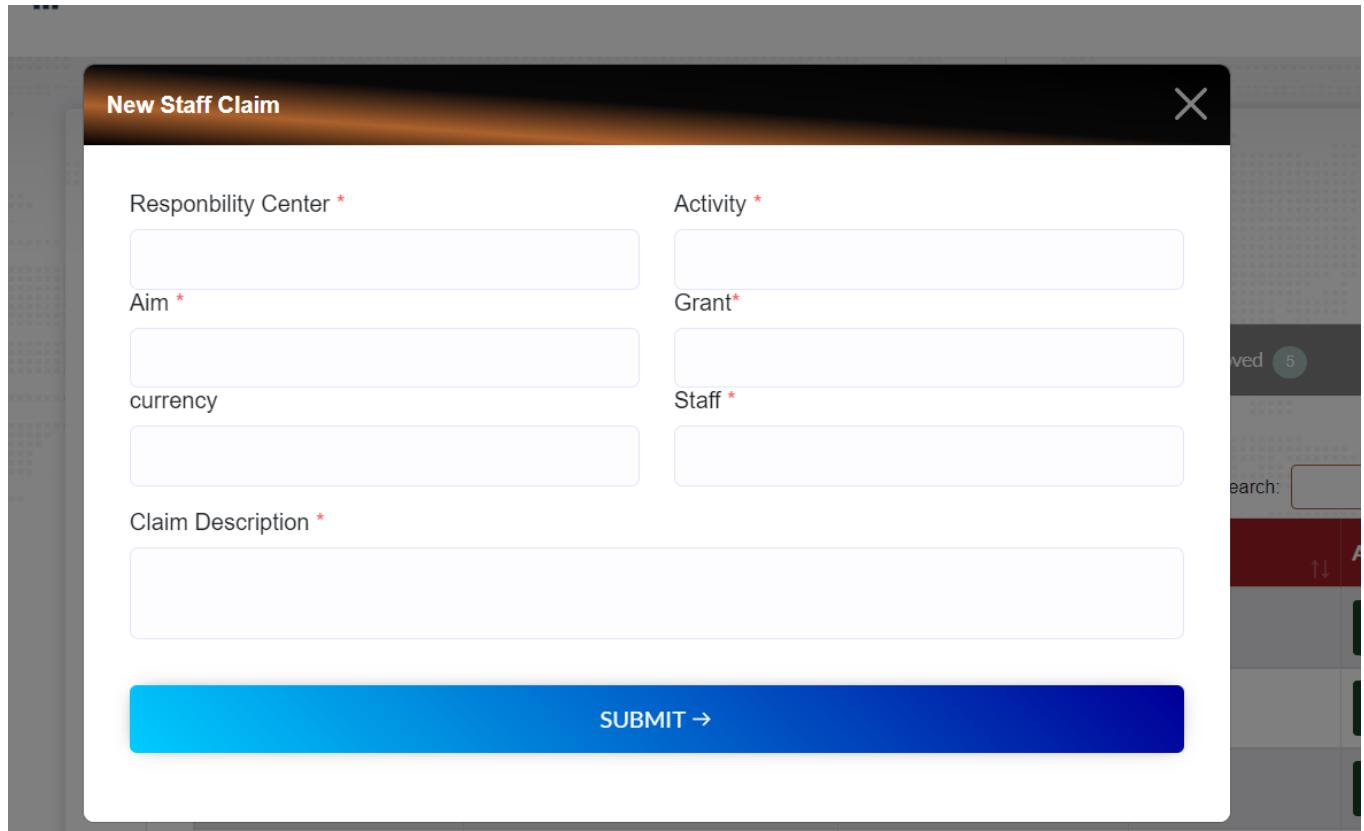
Cancel Request For Approval

Fig 18: Approval Cancellation

Staff Claim

To raise a new claim, go to:

- Staff Claim >> + New Staff Claim >> Submit



New Staff Claim

Responsibility Center *

Aim *

currency

Activity *

Grant*

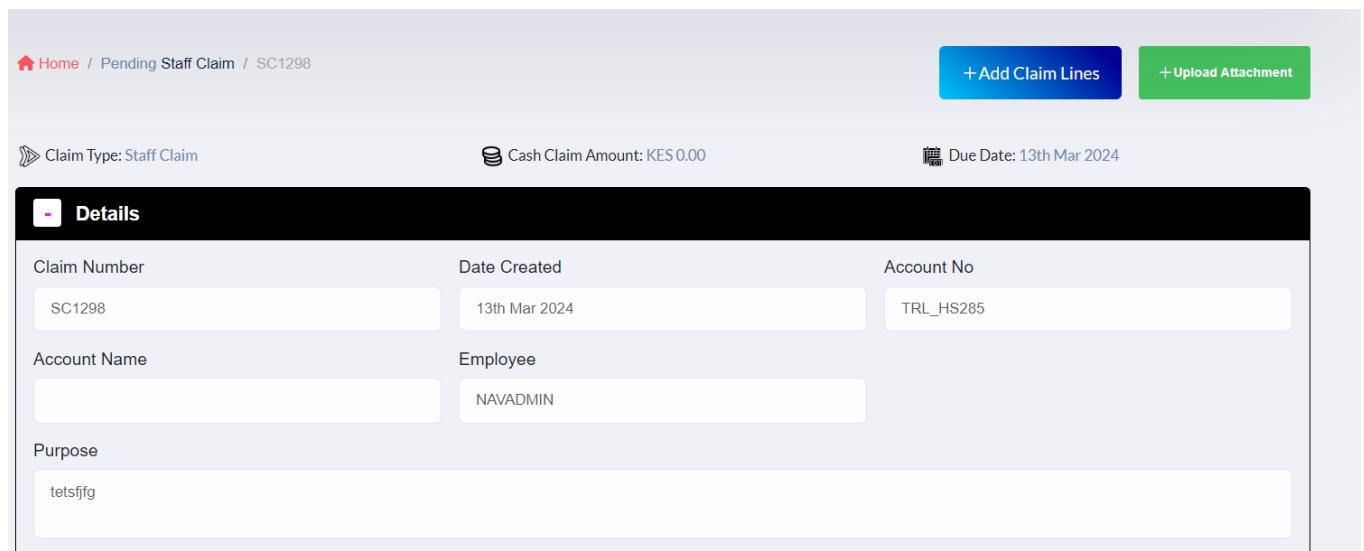
Staff *

Claim Description *

SUBMIT →

Fig 19: Document Upload

- To add lines, go to: View >> + Add Claim Lines >> Submit



Home / Pending Staff Claim / SC1298

+ Add Claim Lines + Upload Attachment

Claim Type: Staff Claim Cash Claim Amount: KES 0.00 Due Date: 13th Mar 2024

Details

Claim Number	Date Created	Account No
SC1298	13th Mar 2024	TRL_HS285
Account Name	Employee	
	NAVADMIN	
Purpose	tetsfifg	

Fig 20: Lines addition

PROCUREMENT

This section outlines activities in the Procurement module. They include:

- Purchase Requisition

Purchase Requisition

To raise a new request, go to:

- Purchase Requisition >> + New Purchase Request.

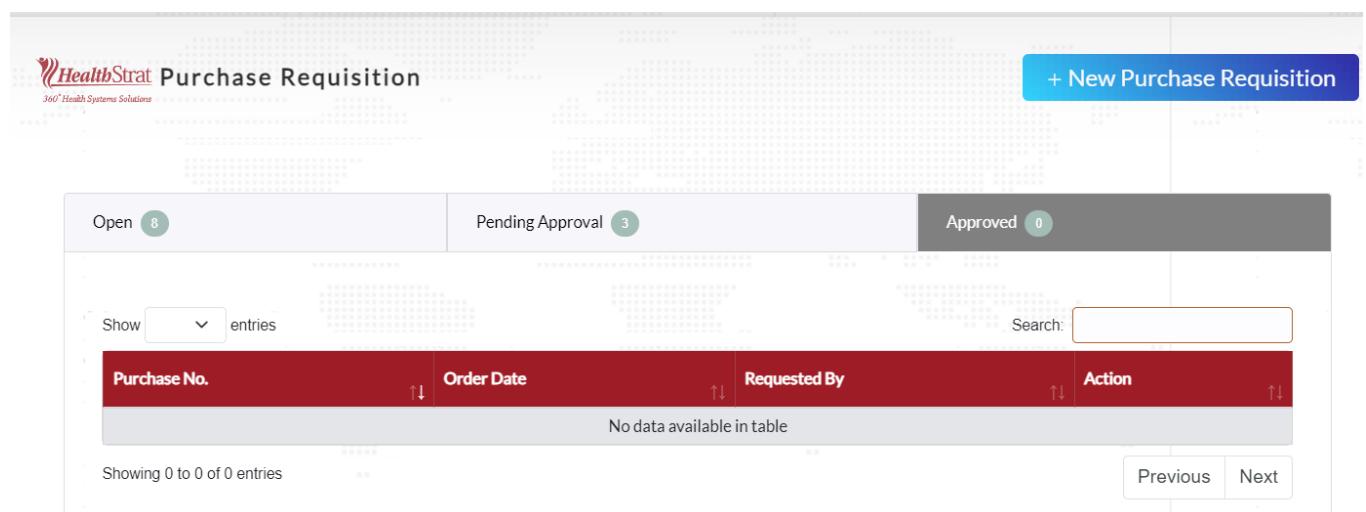


Fig 21: New Purchase Requisition Creation

- Fill in the Purchase request details correctly then submit

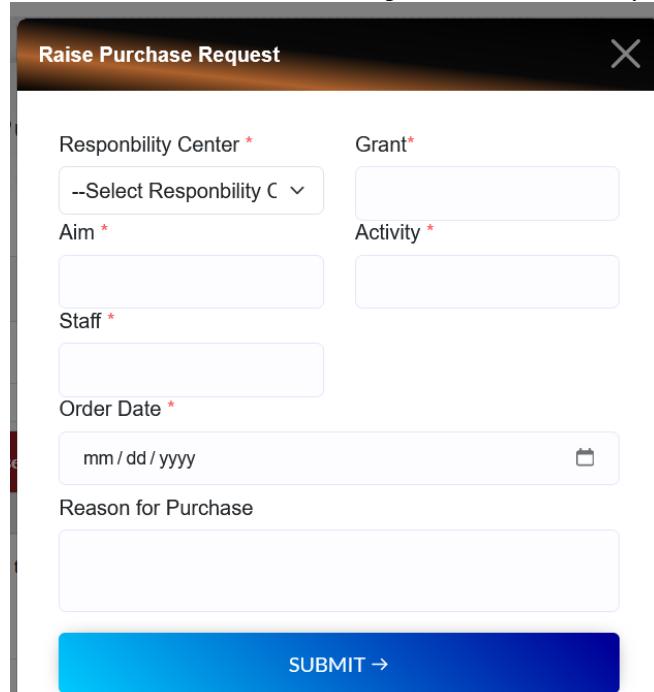
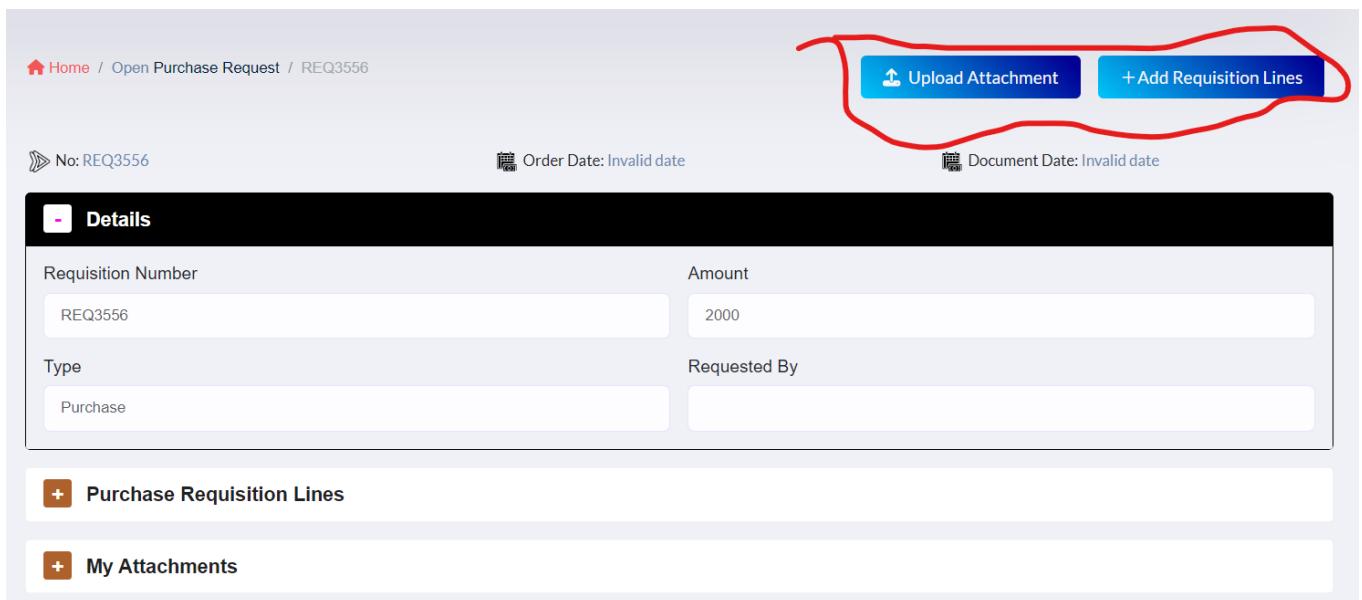


Fig 22: New Purchase Requisition Creation

To add lines, go to:

- Add requisition lines >> Fill relevant details in the next window.



Home / Open Purchase Request / REQ3556

No: REQ3556 Order Date: Invalid date Document Date: Invalid date

Details

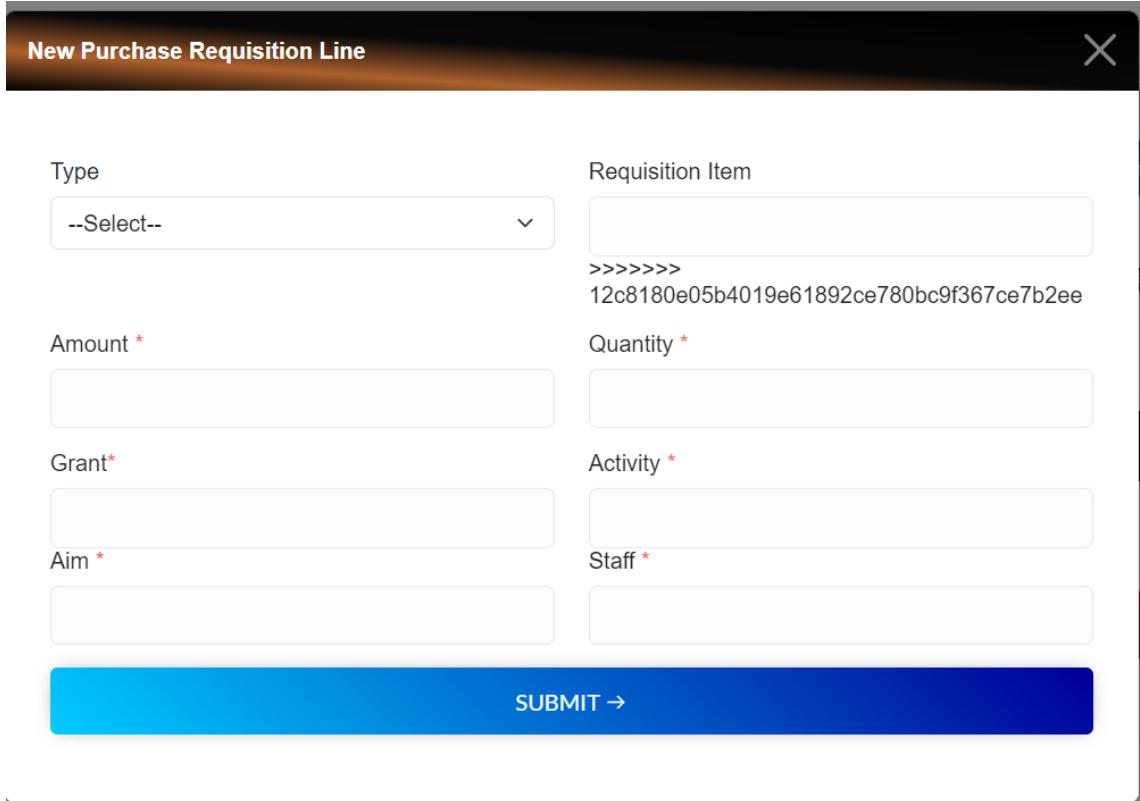
Requisition Number	Amount
REQ3556	2000
Type	Requested By
Purchase	

+ Purchase Requisition Lines

+ My Attachments

Fig 23: Requisition and file upload

- Add the requisition lines details



New Purchase Requisition Line

Type	Requisition Item
--Select--	
Amount *	Quantity *
Grant*	Activity *
Aim *	Staff *

SUBMIT →

Fig 24: Purchase Requisition line details

- Add the Relevant Attachments the send for approval

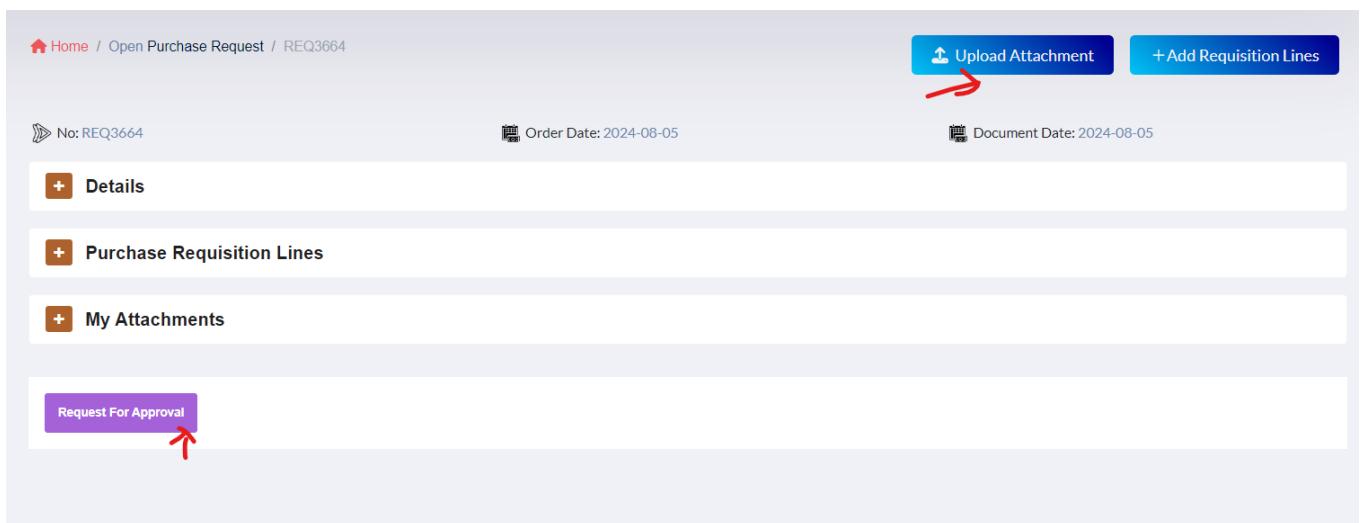


Fig 25: Request for approval

APPROVALS

- For approvals, there is a section under approvals where you can approve documents.

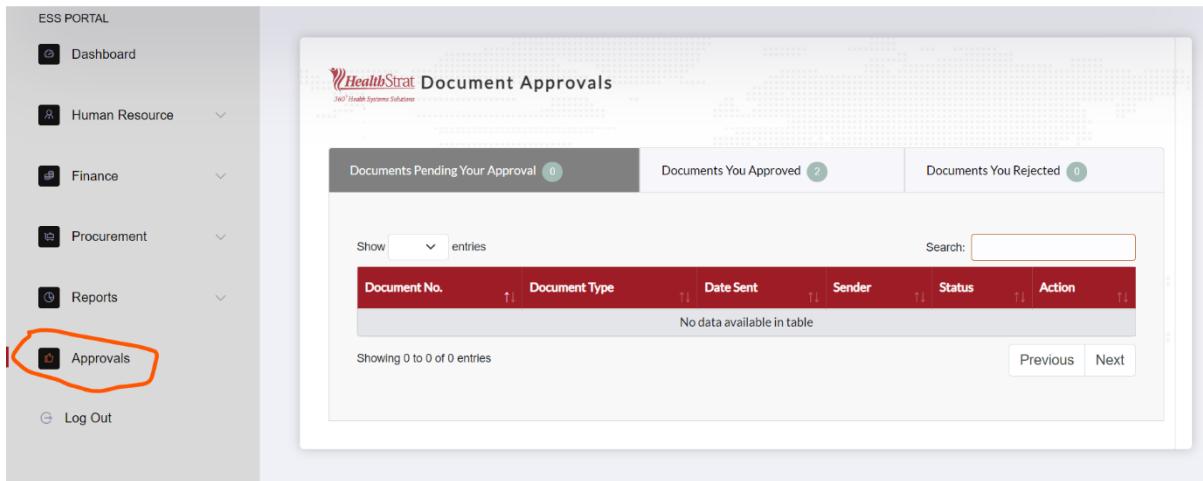
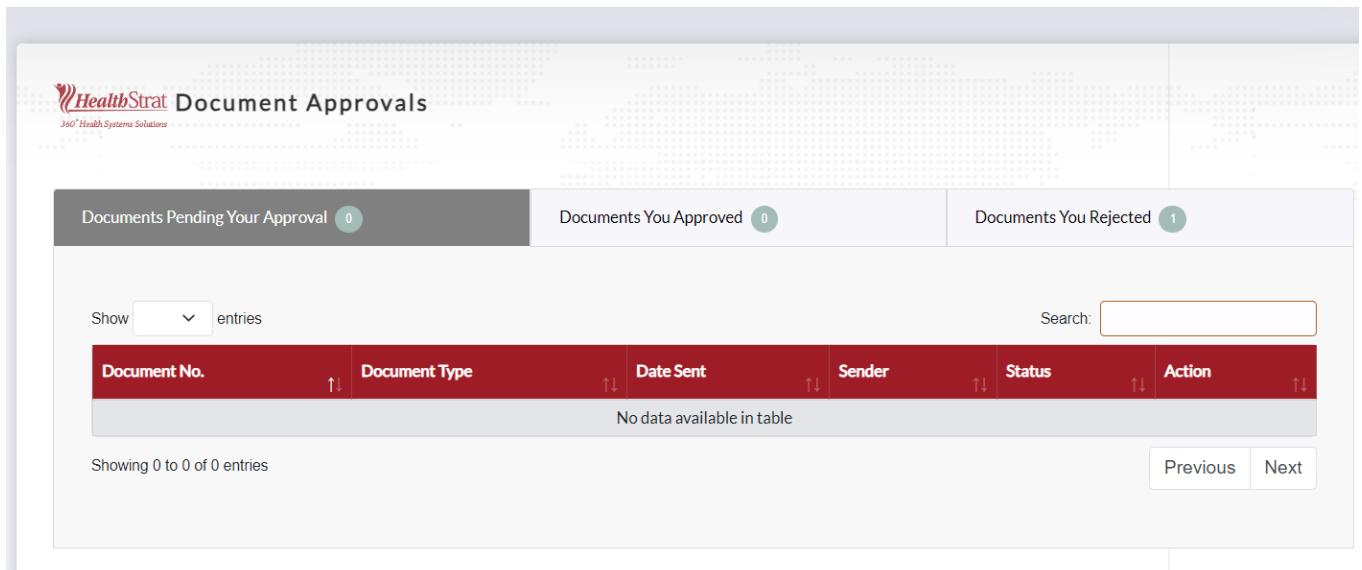


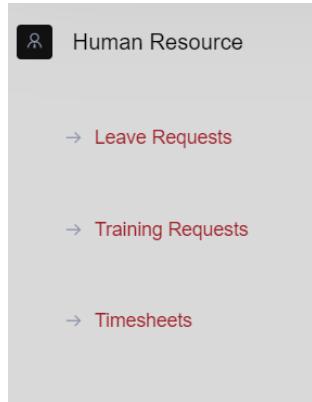
Fig 26: Approval Window

- Once you click on that, you will be able to see the documents pending approval, those approved and those you have rejected.



HUMAN RESOURCE MANAGEMENT

Under this section we have the following sub-modules:



Leave Requests

- To raise a new leave request, Click on the '+New Leave Request'

Leave No.	Leave Type	Start Date	Status	Action
LAP00090	001	9th Jul 2024	Open	<button>View</button>
LAP00089	004	22nd Jul 2024	Open	<button>View</button>
LAP00087	004	30th Jul 2024	Open	<button>View</button>

- The dialog box below will appear for you to fill in the fields “leave type”, “leave start date” and “Days applied” then click on save.

NOTE: Sick leave allows users to backdate, other leave types are Planned in advance and hence should be applied earlier.

New Leave Request

Leave Type *: Annual leave

Leave Start Date *: 08/05/2024

Days Applied: 5

SAVE →

LAP00087 004 30th Jul 2024 Open

- Once you click on save, for leave types such as **sick leave, paternity, maternity and study leave** you can upload a relevant attachment and click on next

New Leave Request

Attachments LAP00023

Choose Files No file chosen

Upload

Prev < Next >

- Once you click next, you can send the request for approval by clicking the action below.

New Leave Request

Leave Header

Attachments

Submit

Done

Send LAP00023 For Approval

« Prev

- You can view the leave details and its status after sending for approval and clicking "View leave details"

Leave Type: 001 Days Applied: 5 Leave Days Balance: 32

Details

My Attachments

Cancel Request For Approval

Document Approvers

Show entries Search:

Entry No.	Name	Sequence	Status	Modified By	Modified Date
48472	NAVTEST	2	Open	NAADMIN	2nd Aug 2024
48471	NAADMIN	1	Approved	NAADMIN	2nd Aug 2024

Showing 1 to 2 of 2 entries Previous Next

- To cancel approval, click on "Cancel Request for Approval"

Training requests

For training requests, we have two types:

- I. **Non-adhoc:** These are trainings that have been planned for/budgeted for by the organization. The training needs are already pre-set by the HR team. To apply for one:
 - Click on '+New Training Requests'.

HealthStrat Training Requests 360° Health Systems Solutions **+ New Training Request**

Open 9 Pending Approval 1 Approved 0

Request No.	Request Date	Adhoc	Start Date	End Date	No. Of Days	Action
-------------	--------------	-------	------------	----------	-------------	--------

- You will be prompted to fill in the fields below then submit.

Adhoc *

No

Training Need

--Select Training Need--

--Select Training Need--

REPORT WRITING

DBA

MICROSOFT CERTIFICATION

TEST

LATEST

II. **Ad hoc:** These are trainings that were not planned for by the organization. To apply for one:

- Click on New training Request >> select yes under Adhoc'

Home / Open Training Requests /

+ Add Training Lines

Upload Attachment

Details

Request Number: TR-0097

Description

Planned Start Date: 0001-01-01

Planned End Date: 0001-01-01

Number of Days: 0

Venue

- You will be prompted to fill in the fields above then submit.

Adhoc *

Yes

Training Course *

Field of Training *

Training Type *

Select

Start Date *

End Date *

mm/dd/yyyy

mm/dd/yyyy

Sponsor Type *

Provider *

Training Cost *

Select

0.00

Training Objectives *

SUBMIT

- The added details will be saved under Adhoc Training lines.

Adhoc Training Lines				
Show	entries	Search:		
Training Name	Training Area	Training Objectives	Venue	Provider
TEST	IT	TEST1	ONLINE	TEST
Showing 1 to 1 of 1 entries				
			Previous	1 Next

- You can also add attachment by clicking the Upload attachment on the to right of the page >> upload your selected document >> submit to add the attachment. It will appear as shown below.

My Attachments

 360° Health Systems Solutions Davis July 2024 Timesheet.pdf.pdf	 360° Health Systems Solutions Davis Mutuku July 2024 Timesheet.pdf.pdf
---	--

Request For Approval

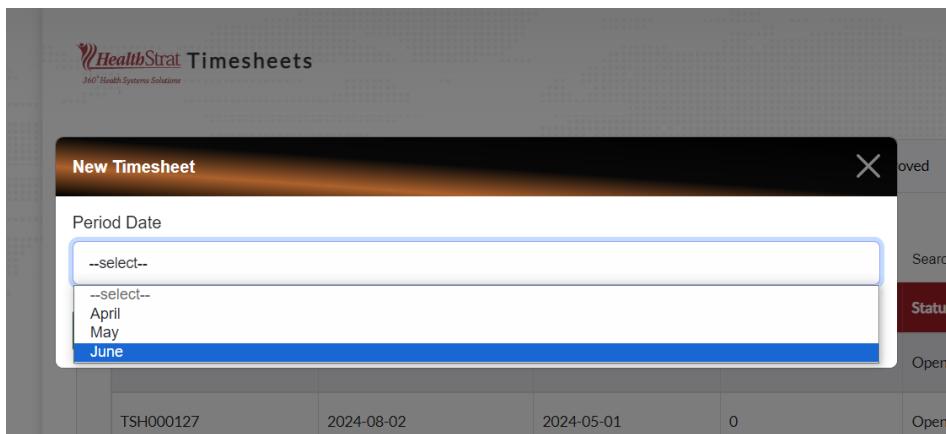
- You can preview the attachment by clicking the green download icon

Timesheets

- To create a new timesheet, click '+ New Timesheet'

HealthStrat Timesheets			+ New Timesheet		
Open	40	Pending Approval	0	Approved	0
Show ▾ entries					
Search:					
Timesheet No	Date Captured	Period Date	Total Hours	Status	Action
No data available in table					
Showing 0 to 0 of 0 entries			Previous	Next	

- You will be required to select the Timesheet period as shown below and click 'Submit.'



- Select +New Timesheet line to upload a new timesheet. Shown below>

Home / Timesheets / TSH000084

+Upload Attachment + New Timesheet Line

Approval Status: Open

Details

Date Captured	Period Date
2024-07-11	2024-06-01
Total Hours/Expected Working Hours	Total Hours Worked/Reported
0	0

- Open the Timesheet line >>fill project working with>>click submit >>submit button.

New Timesheet Line

Projects/Costs Center

AstraZeneca

Submit →

Details

- Automatically, the line is generated to add hours worked as shown below. For Staff with several projects will repeat the previous step of adding lines and select their Projects respectively.

- Click on the **save** button at the end of the lines to save the hours worked for each project.
- To upload Attachments (if any) >click + Upload Attachments.

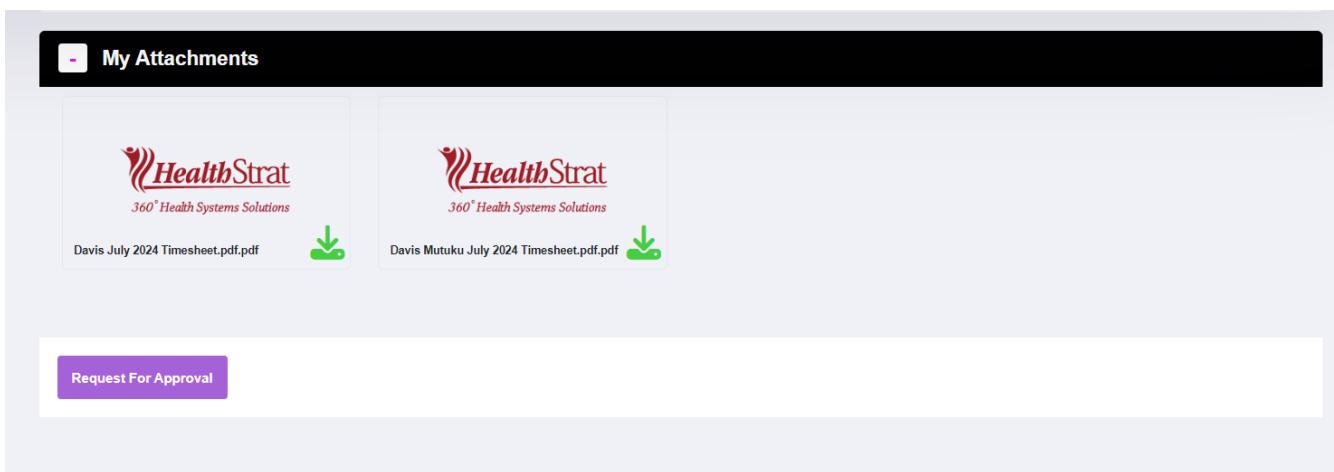
 [Home](#) / [Timesheets](#) / TSH000084

[+Upload Attachment](#) [+ New Timesheet Line](#)

➤ Choose upload page >Choose file >Upload >Submit

A screenshot of a 'Upload Attachment' modal window. The window has a dark header bar with the title 'Upload Attachment' and a close button (X). The main content area is white and contains a file input field with the placeholder 'Choose Files' and 'No file chosen'. Below the input field is a large blue 'Submit' button with the text 'Submit →' in white. The background of the entire application is a light grey, and there are other UI elements like a sidebar with a grid icon and a user profile icon.

- Check uploaded Attachments > under “+ Attachments”



My Attachments

HealthStrat
360° Health Systems Solutions

Davis July 2024 Timesheet.pdf.pdf

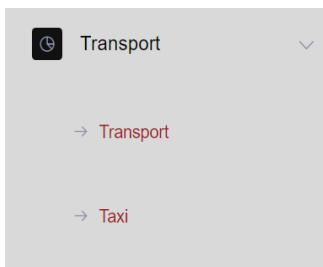
Davis Mutuku July 2024 Timesheet.pdf.pdf

Request For Approval

TRANSPORT

This section contains two sections:

1. Transport
2. Taxi



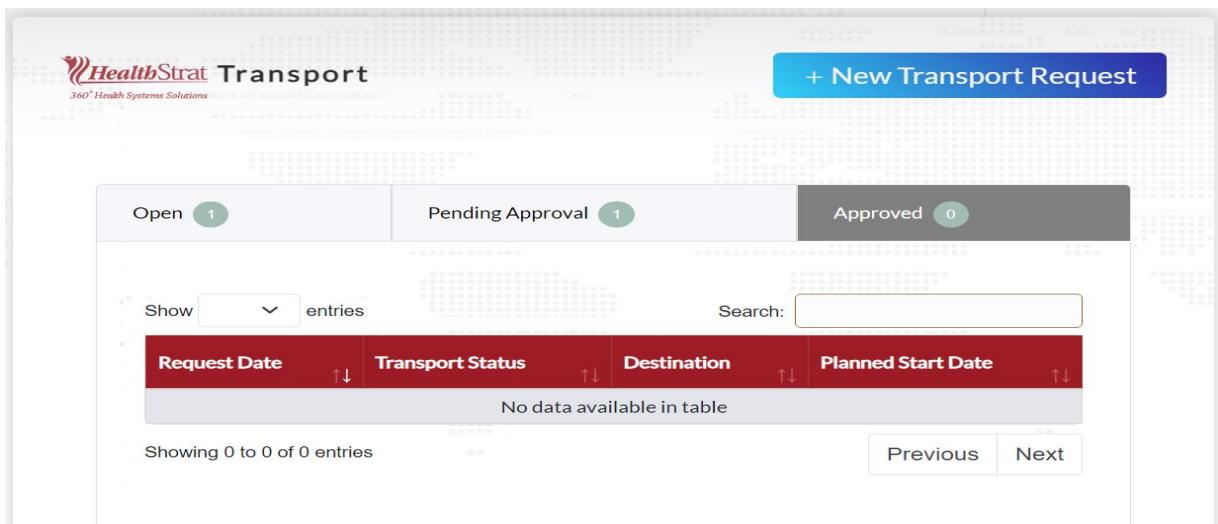
Transport

→ Transport

→ Taxi

Transport

➤ To create a new transport request: click on the '+New Transport Request' below.



HealthStrat Transport

+ New Transport Request

Open 1 Pending Approval 1 Approved 0

Show entries Search:

Request Date	Transport Status	Destination	Planned Start Date
No data available in table			

Showing 0 to 0 of 0 entries

Previous Next

➤ You will be directed to a new page, fill required fields as prompted below

New Transport Request X

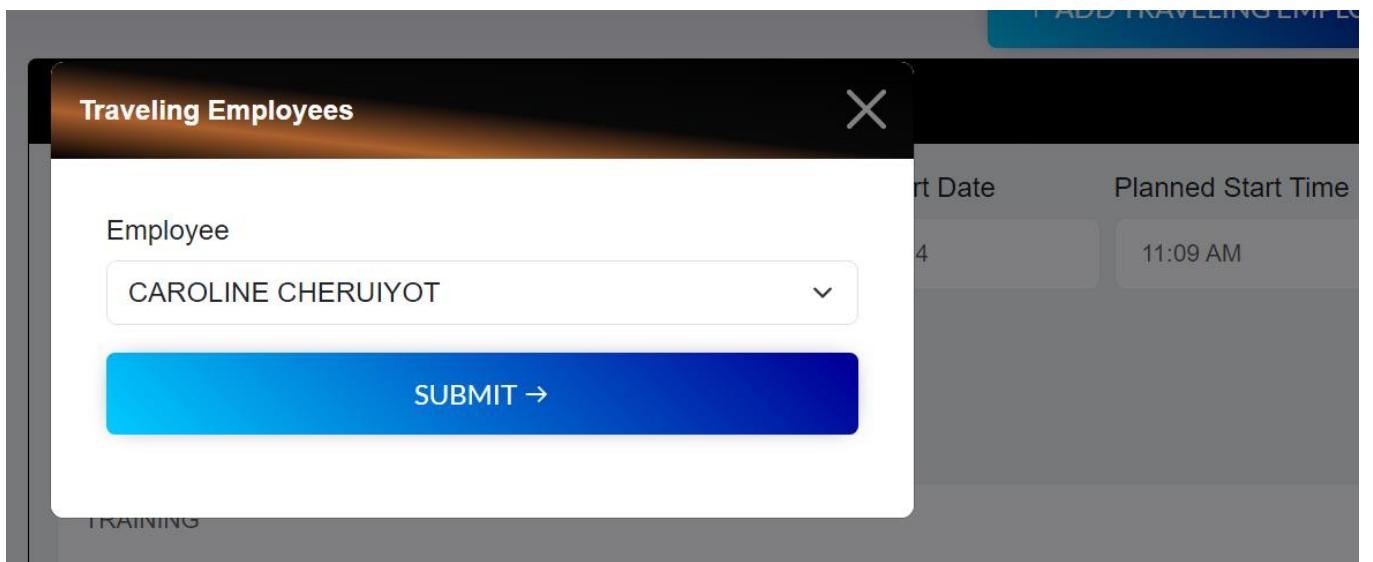
Grant*	Responsibility Center *
--Select Grant --	--Select Responsibility Center --
Travel Type	Destination
--Select Option--	<input type="text"/>
Start Date	Start Time
<input type="text"/> mm/dd/yyyy	<input type="text"/> --:-- -- (L)
End Date	End Time
<input type="text"/> mm/dd/yyyy	<input type="text"/> --:-- -- (L)
Car Capacity	<input type="text"/>
Traveling Reason *	

- Fill in relevant details and Click on the 'submit' button.
- Fill the Employees Lines >Click on "+Add Traveling Employees" below

[Home](#) / Open Transport Request / TREQ-0069 + ADD TRAVELING EMPLOYEES

Details			
Date Created	Destination	Planned Start Date	Planned Start Time
<input type="text"/> 11th Jul 2024	<input type="text"/> NAIROBI	<input type="text"/> 7th Jun 2024	<input type="text"/> 11:09 AM
Planned End Date	Return Time		
<input type="text"/> 20th Jul 2024	<input type="text"/> 00:00 AM		
Reason for Travel			
<input type="text"/> TRAINING			

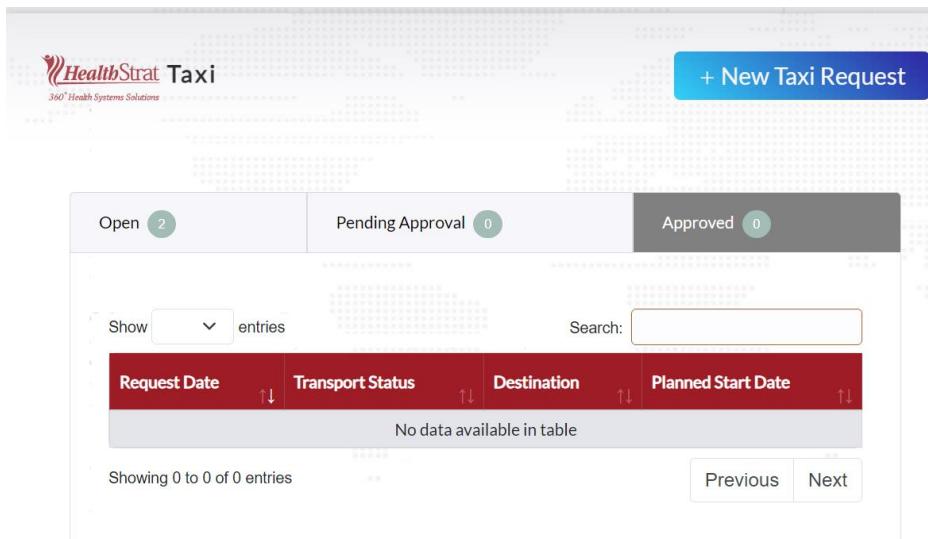
- Fill Employee details click "Submit" to fill the lines.



- Send the request for approval

Taxi

To make a taxi request click on the '+ New Taxi Request'.



Fill in the required details below.

New Taxi Request X

Start Date	Start Time	
<input type="text" value="mm/dd/yyyy"/> 	<input type="text" value="--:-- --"/> 	
End Date	End Time	
<input type="text" value="mm/dd/yyyy"/> 	<input type="text" value="--:-- --"/> 	
Car Capacity	Number of Night Outs	Pick Up from
<input type="text"/> 	<input type="text"/> 	<input type="text"/>
Traveling Reason *		
<input type="text"/> 		
SUBMIT →		

Click "Submit" to fill the

PERFORMANCE MANAGEMENT

Performance Management ▼

- [New Appraisal](#)
- [My Appraisals](#)

Under this module, we have 2 categories:

1. [New Appraisals](#)
2. [My Appraisals](#)

To create a new appraisal,

- Click on the '+ New appraisal and fill in the details following the spaces provided.

Responsibility Center

Choose..

Remarks

Start Appraisal →

Fill the fields. >> Responsibly Center >> remakes >> Click “Start Appraisals”.

Start New Performance Target >> Click on +New Performance Objectives

+ New Performance Target

Show entries

Search:

Key Responsibility	Weight	Mid Year Rating	End Year Rating	Action
No data available in table				

Showing 0 to 0 of 0 entries

Previous Next

Appraisal Details

Appraisal Period	Appraisal Stage	Appraiser Name
2024	New	DERICK LUDEMBE MASINDE
Appraisal Period Start	Appraisal Period End	Reward Type
mm/dd/yyyy	mm/dd/yyyy	Bonus

Below Table Set Targets > Fill description weight>Save Targets

Setting Appraisal Targets

Target Description

Weight

0

Maximum Score: (5)

Save Target →

Click “Get Attributes” field below.

Performance Targets

+ New Performance Target Get Attributes → Go Next →

Show entries Search:

Key Responsibility	Weight	Mid Year Rating	End Year Rating	Action
above average	4	0	0	N/A
5	1	0	0	N/A

Showing 1 to 2 of 2 entries Previous Next

Performance Attributes

← Prev

Initiate Appraisal →

Show entries

Search:

Attribute Description	Maximum Score	Mid Year Rating	End Year Rating	Action
TIME MANAGEMENT	5	0	0	N/A
TEAM WORK	5	0	0	N/A
SOCIAL RESPONSIBILITY	5	0	0	N/A
PROFESSIONALISM	5	0	0	N/A
TRAINING AND DEVELOPMENT	5	0	0	N/A

Click “Initiate Appraisal” to view your generated Appraisal.

View existing appraisal records, click on “my Appraisals.”

My Appraisals 4

Score Requests 0

Show entries

Search:

Appraisal No.	Appraisal Period	Status	Appraisal Stage	Appraiser	Action
APP000033	2024	Setting	New	HS234	<input type="button" value="View →"/>
APP000032	2024	Setting	Mid-Year	HS234	<input type="button" value="View →"/>
APP000031	2024	Setting	Mid-Year	HS234	<input type="button" value="View →"/>
APP000030	2024	Setting	Mid-Year	HS234	<input type="button" value="View →"/>

Showing 1 to 4 of 4 entries

Previous 1 Next

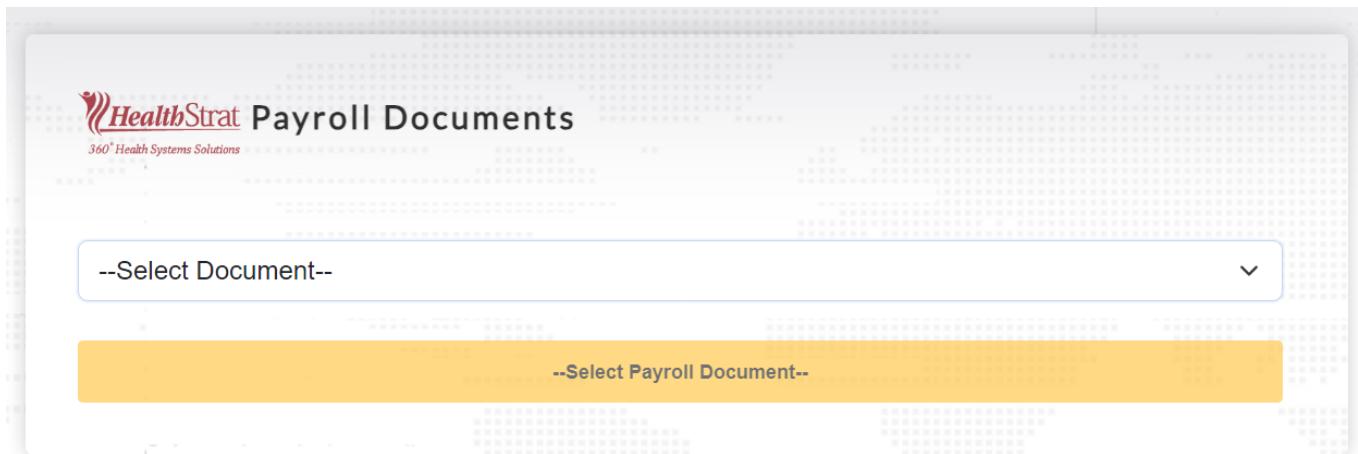
REPORTS

Under reports we have sub-modules reports:

- Payroll reports- This helps to cross-check financial data.
- Leave reports- shows you all leave incurred (already taken), difference (unplanned and taken leave), and future scheduled (planned on the schedule for the future).

Payroll reports

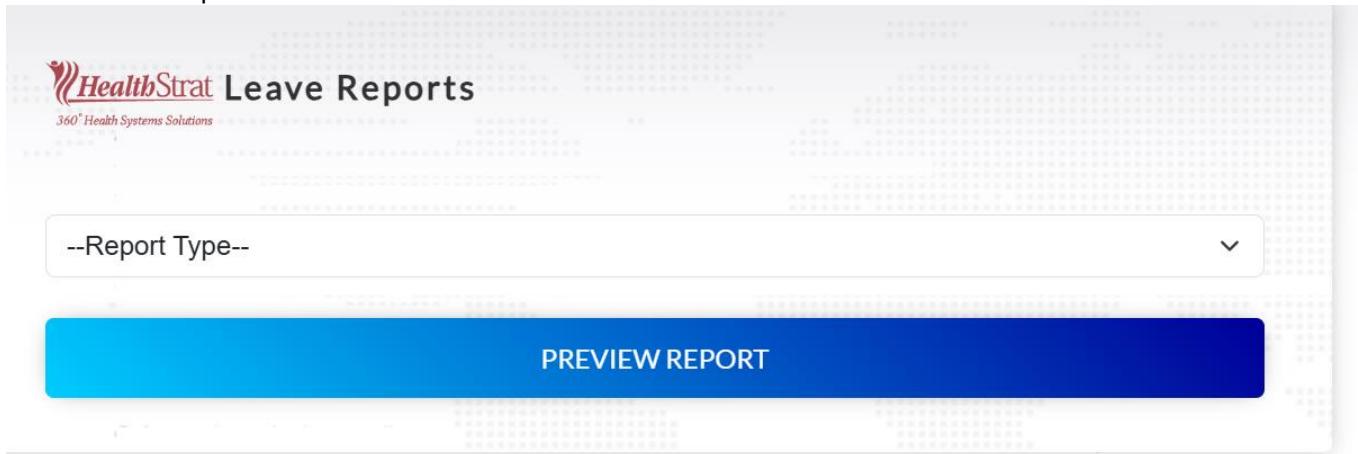
To check reports posted click drop down 'select document'.



Select the document and fill details above>prompt to select document >select period>submit.

Leave report

Click on leave report>below.



Choose the report type you will work with>click preview report button.