VALIANT

Employee Self Service | User Manual
Version 1.1

## Table of Contents

1. Welcome / Overview

Welcome to the Employee Self Service Portal!

This Portal was designed to empower, you the Employee, by providing direct access to your employment information. You will have access to review your personal profile information as well as to view your Schedule, Pay Statements, Annual Tax Forms and remit Leave requests online, anytime. In addition you will have access to key Resource Tools to allow you to better understand your pay statements as well as plan for withholding changes and life events.
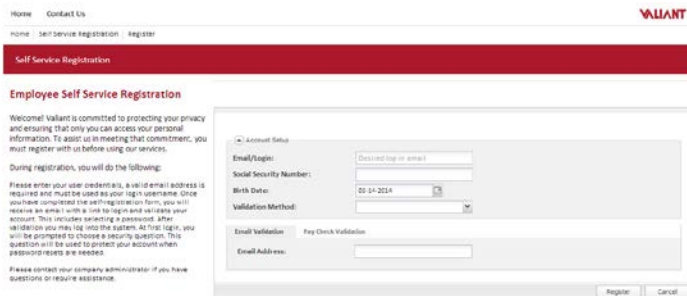
1.1 Self Registration
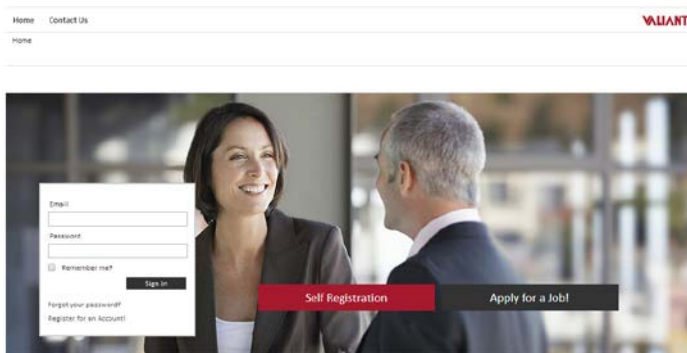
From the Portal home page, select

Self Registration

You will be prompted to complete the Account Setup to validate your identity and grant access to the Self Service Portal.

Welcome instructions will be provided onscreen to guide you successfully through this process.

There are 2 validation methods available for you to choose in validating your identify for Account Setup.

The first method is Email Validation in which you will enter the primary email address on record with your employer.
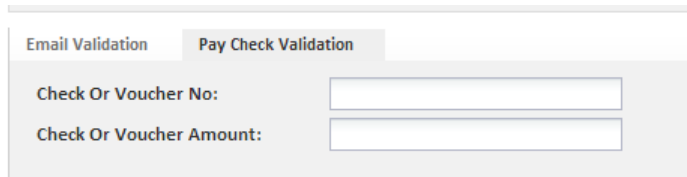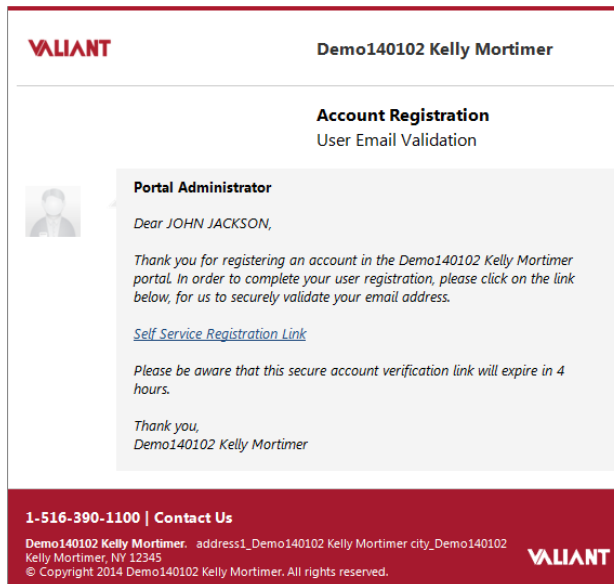
The second method is Pay Check Validation in which you must enter a valid combination of a previously issued check/voucher number and check/voucher amount.

✓ System has successfully validated your identity. A verification has been sent to your login e-mail.

Once you have entered all required information, you will select 'Register'.
If validation of information entered was successful, you will receive a confirmation message

Immediate email notification will be sent with a time sensitive link.
You must click on this link to complete the registration process.

VALIANT　　　　　　Demo140102 Kelly Mortimer

Account Registration
User Email Validation

Portal Administrator

Dear JOHN JACKSON,

Thank you for registering an account in the Demo140102 Kelly Mortimer portal. In order to complete your user registration, please click on the link below, for us to securely validate your email address.

Self Service Registration Link

Please be aware that this secure account verification link will expire in 4 hours.

Thank you,
Demo140102 Kelly Mortimer

1-516-390-1100 | Contact Us
Demo140102 Kelly Mortimer.   address1_Demo140102 Kelly Mortimer city_Demo140102
Kelly Mortimer, NY 12345
© Copyright 2014 Demo140102 Kelly Mortimer. All rights reserved.　　**VALIANT**

| New Password: | Enter your new password |
| Confirm Password: | Confirm your password |

Submit　Cancel

Once you click through the link, you will be directed to the Portal to create your Account Password.

Create Account Password

Welcome! Valiant is committed to protecting your privacy and ensuring that only you can access your personal information. To assist us in meeting that commitment, your password has to meet below criteria.

- Password must be minimum of **6 characters** in length.

- Password must contain **at least one number**

- Password must contain **at least one uppercase character**

- Password must contain **at least one lowercase character**

- Password must **not contain first or last name**

- Password must **not contain username**

- Password must **not repeat more than four of the same characters** next to each other

Welcome instructions will be provided onscreen to guide you successfully through this process.

✓ Self Service Registration process has been successfully completed. Please sign in with your credentials.

VALIANT   Demo140102 Kelly Mortimer

New Portal User
A new user account was created

Portal Administrator

Dear Administrator,

JOHN JACKSON as user productmanagement@valiant.com, has successfully self-registered into the Demo140102 Kelly Mortimer Portal on 3/14/2014 at 4:07 PM.

Thank you,
Demo140102 Kelly Mortimer

1-516-390-1100 | Contact Us
Demo140102 Kelly Mortimer.   address1_Demo140102 Kelly Mortimer
city_Demo140102 Kelly Mortimer, NY 12345
© Copyright 2014 Demo140102 Kelly Mortimer. All rights reserved.

VALIANT

Once you have successfully created your account password you will receive a message and email notification.
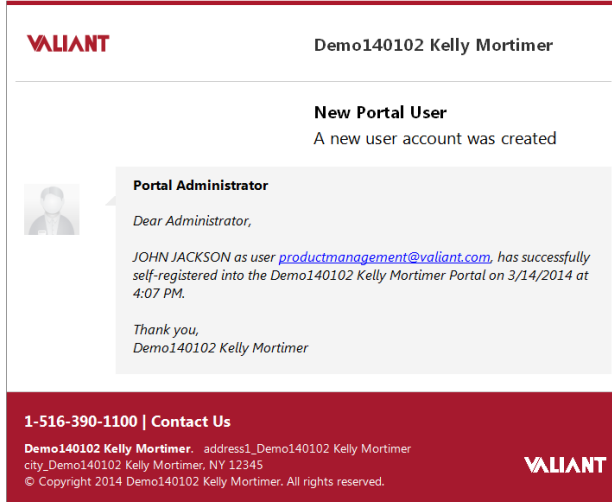
Administrators will also receive notification of your registration as well as any lock out activity so they can support you.

1.2   **Signing In**

From the Valiant Portal home page, enter your Username (e-mail address) and Password.

Email

Password

☐ Remember me?

Sign in

Forgot your password?

Register for an Account!

If you want the system to remember your username on this computer place a check mark in the [☐ Remember me?] box.

Click the [Sign in] button to go to the Welcome Dashboard.

NOTE: The Valiant Portal is compatible with Google Chrome, Firefox, IE10 and Safari. All on Windows, Mac and Linux.

Home   Self Service   Resources

My Profile | My Pay Statements | My Annual Statements | My Schedule

My Annual Statements   My Payroll   My Profile   My Time
Annual Statements   Pay Statements   Education History   Leave Request
                    W4 Form   Emergency Contact List   Schedule
                            Prior Employment History
                            Training
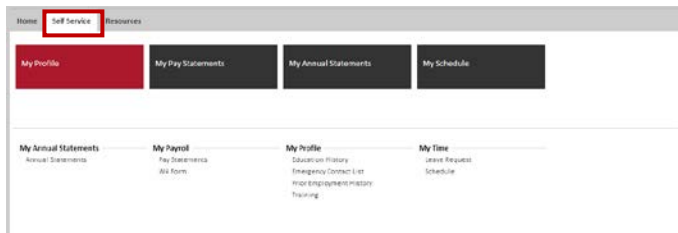
Once you have made your client selection, navigate to the Self Service Section of the Portal by first moving your cursor over the "Self Service" heading to access the Self Service Dashboard.
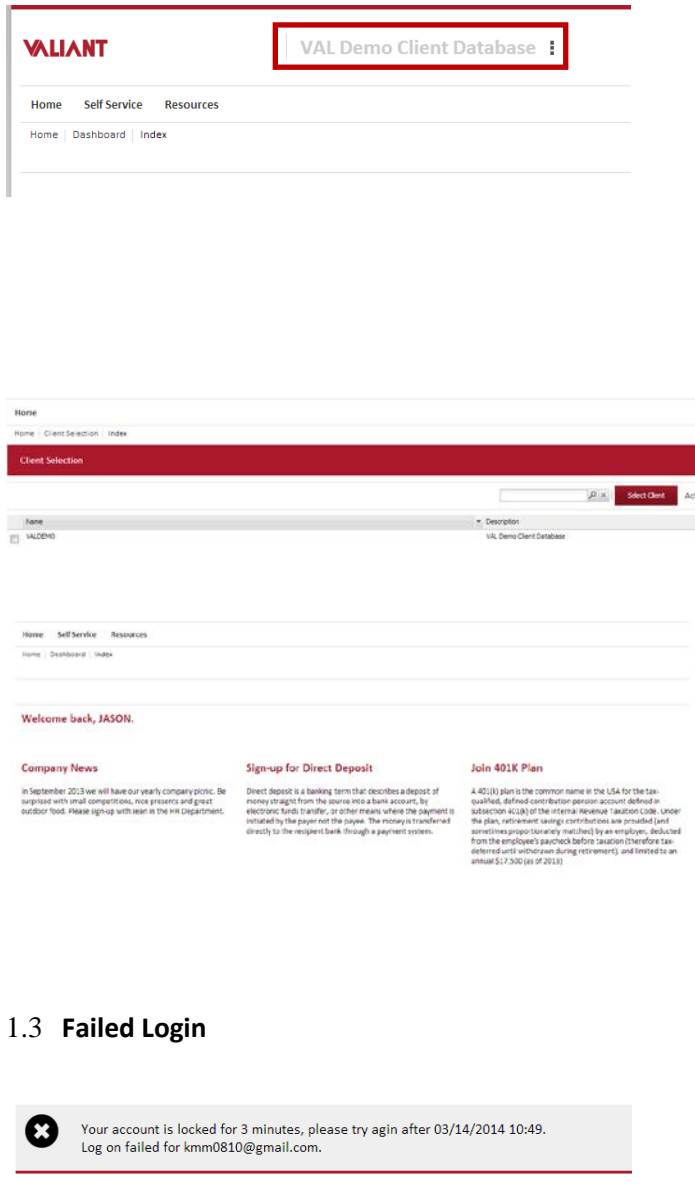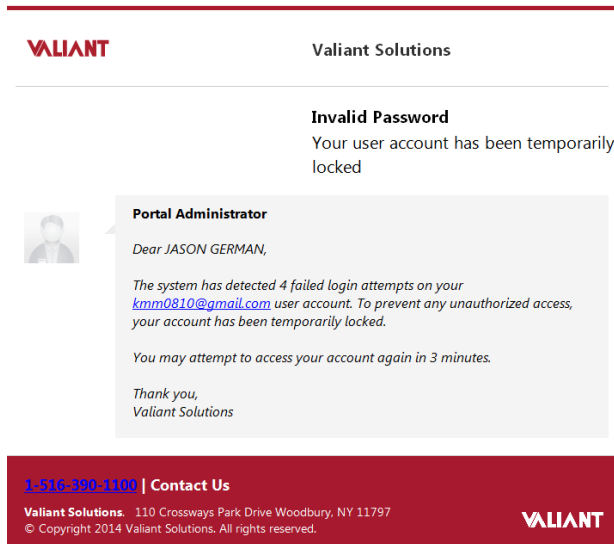
If you are employed with just one employer, this selection screen will not appear and you will be directed into the Self Service Portal with the single employer already pre-selected for you. The Client / Employer name will appear at the top of the page. You may click on the name at any time to Navigate between client records.

Dashboard on the Home page is the primary landing page when logged in, where you will receive a welcome greeting and be presented with content designated by your company administrator such as company news.

1.3 Failed Login

Three consecutive failed login attempts will result in your user account being locked for a 'defined' period of time.

VALIANT Valiant Solutions

Invalid Password
Your user account has been temporarily locked

Portal Administrator

Dear JASON GERMAN,
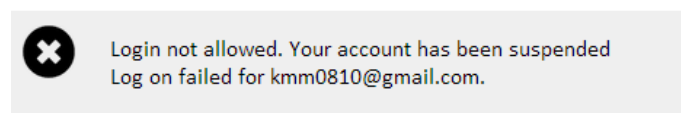
The system has detected 4 failed login attempts on your kmm0810@gmail.com user account. To prevent any unauthorized access, your account has been temporarily locked.

You may attempt to access your account again in 3 minutes.

Thank you,
Valiant Solutions
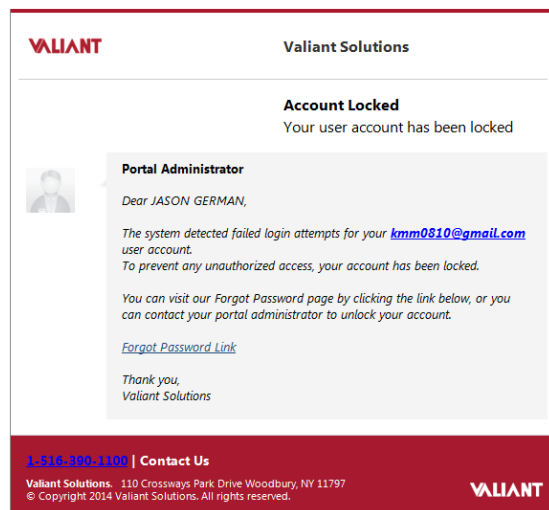
1-516-390-1100 | Contact Us
Valiant Solutions. 110 Crossways Park Drive Woodbury, NY 11797
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Upon your account being locked, the system will distribute an immediate email notification to your designated email address

Login not allowed. Your account has been suspended
Log on failed for kmm0810@gmail.com.

Continued failed attempts will Suspend your user account

VALIANT Valiant Solutions

Account Locked
Your user account has been locked

Portal Administrator

Dear JASON GERMAN,

The system detected failed login attempts for your kmm0810@gmail.com user account.
To prevent any unauthorized access, your account has been locked.

You can visit our Forgot Password page by clicking the link below, or you can contact your portal administrator to unlock your account.

Forgot Password Link

Thank you,
Valiant Solutions

1-516-390-1100 | Contact Us
Valiant Solutions. 110 Crossways Park Drive Woodbury, NY 11797
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Upon your account being suspended, the system will distribute an immediate email notification to your designated email address
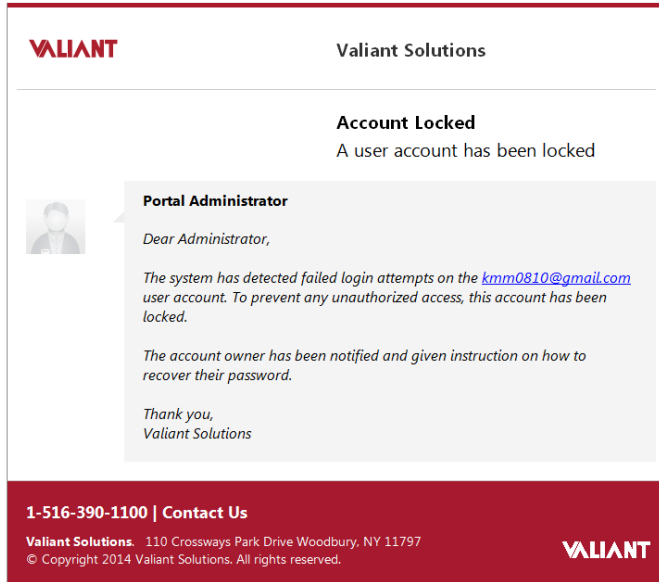
Once your account is suspended, your Administrator will receive an email notification advising of the suspension action and you will need to contact your administrator to restore access.

Once your Administrator resets the password on your account, you will receive immediate email notification. Upon receipt of the email, you will then be required to contact the administrator for a temporary password required to access your account.
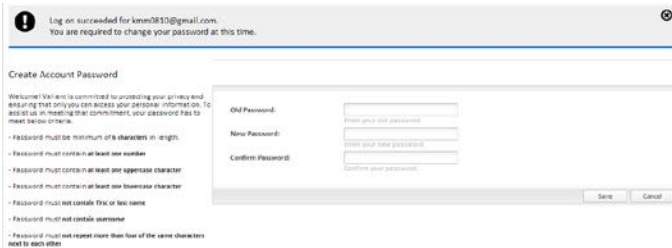
On log in you will then be prompted to change the account password to maintain proper account security.
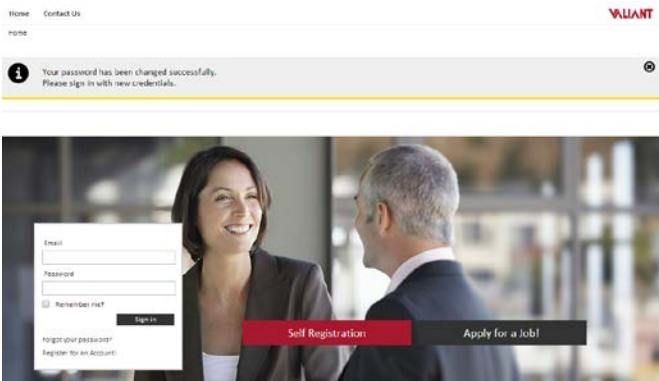
After successfully resetting the account password, you will be returned to the login page and will receive a confirmation that your password has been changed successfully. You may then login with your new credentials.

1.4 Forgot Password

From the Valiant Portal home page, select the link **Forgot your password?**

You will be prompted to enter your registered Email.
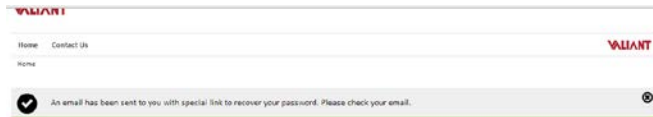
Upon Request you will be returned to the Home page with confirmation and instruction of email notification with password recovery details.
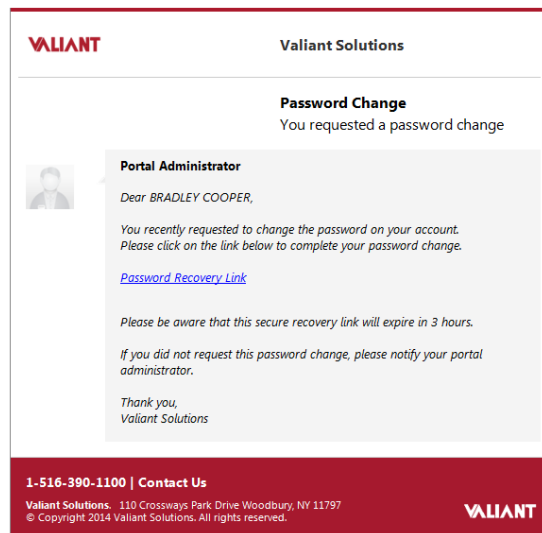
You will immediately receive an email with a Password Recovery Link.
For added security, the Password Recovery Link must be accessed within 3 hours of receipt, at which time it will expire.
Note: If you exceed the expiration period, the link will no longer be effective and you will be required to re-initiate the 'Forgot Password' link from the Home page.

When accessing the Password Recovery Link, you will be directed to the Portal to validate your identity by correctly answering your defined security question.
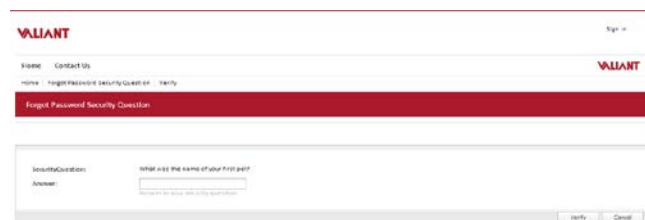
Once verified, your user account will be acknowledged and you will be prompted to enter a New Password.

The Account Password criteria is displayed to guide you through this process successfully.

Note: if the password entered does not adhere to the defined password criteria, you will be prompted with a corresponding validation message.

There were validation messages.
newpassword :
- Your new password must contain at least 6 characters
- Your new password must contain at least 1 numeric character
- Your new password must contain at least 1 uppercase character

After successfully creating a new password, you will be returned to the Home login page and receive a message indicating the password has been changed successfully and can now login.
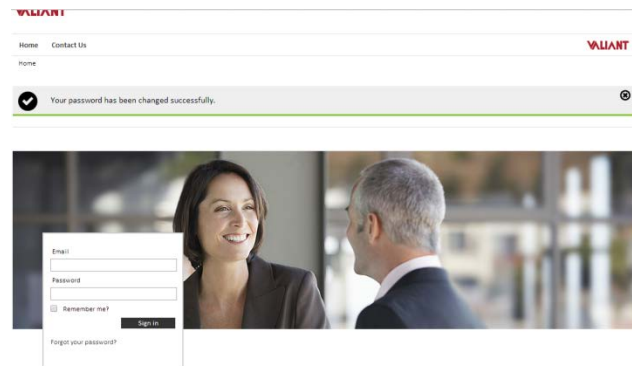
1.5 Acknowledgement of Terms of Use & Privacy Policy
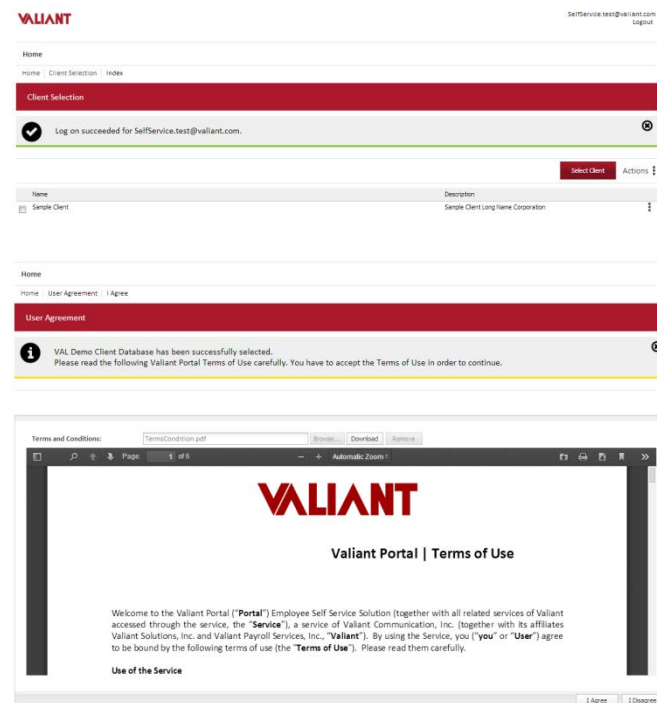
Upon initial login, you will receive a log on succeeded message and be prompted to select the Client, if you are employed with multiple employers.

Once in the context of a Client, you will be prompted to review the Valiant Portal Terms of Use & Privacy Policy on initial use of the application.

Accepting the Terms of Use is a requirement to use the Valiant Portal. However you will have the option to either select 'I Agree' or 'I Disagree'.

Note: You will be prompted to Review & Accept Valiant Portal Terms of Use &

Privacy Policy as updates to the Policy are implemented periodically.
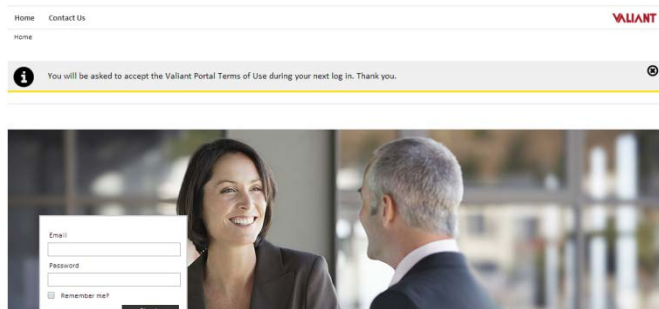
I Disagree will redirect you to the login page and return a message advising you that you will be prompted on next login in attempt to accept the Terms of use.
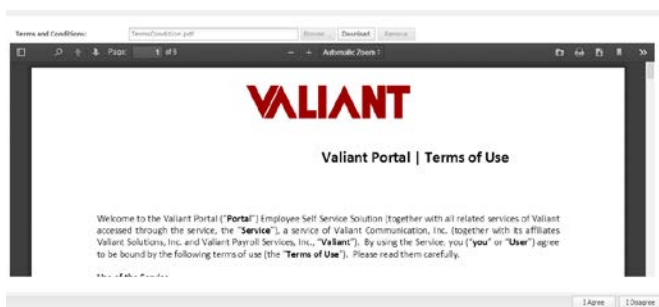
I Agree

Once the terms have been accepted, they will be accessible at all times by accessing the hyperlink in the lower right footer of the portal.

1.6 Navigation Self Service
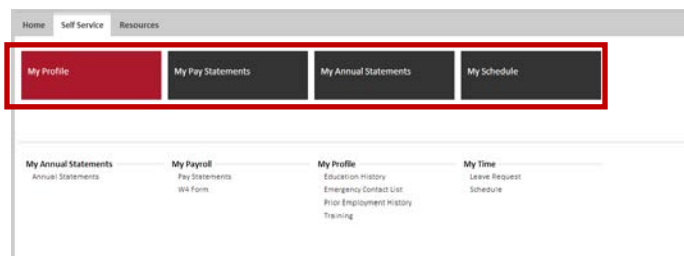
On the Self Service Dashboard, there are four main selections available for you to execute.

The four Actions that the Self Service user role may execute is to access 'My Profile', 'My Pay Statements', 'My Annual Statements' and 'My Schedule' .

Once you execute any of the four selections, you will be presented with the standard list view.

The list view provides several abilities as shown below.

Sort Records:

Records can be sorted by any column displayed.

To sort them by Title, for example, hover your mouse over the Title Column Header until the drop-down menu appears. Choose "Sort Ascending" or "Sort Descending" depending on your needs.

Hide/Display Columns:

From the same drop-down menu, you may choose to hide any columns in the Index screen by un-checking the box next to each column. Please be sure to check the boxes for all columns you want to display. By default they will all be selected.

Filter Columns:

You can also filter any of the columns to look for specific records.

For example, to search for payments made by method of Check, hover your mouse over the Filters option and type that word in the selection. Your list view will automatically be filtered to reflect only the filtered data. To remove the filter, just uncheck the "Filters" box.

Change Column Display Order:

By "grabbing" (click and hold) any of the column headers, you can change the order in which the columns are displayed. In the example, the "Check-Direct Deposit-Cash" column is being moved so it displays right before the "Voucher #" column.

NOTE: Up and down arrows show up at the drop spot and the green check mark next to the column's name to determine that the column can now be dropped.

Footer:
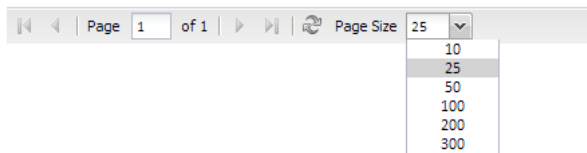
To offer users a more quick and convenient navigation through pages, the system uses pagination mechanism to displays records one page at a time. Controls at the bottom of the screen provide the ability to easily navigate through the results.

A user can type the specific Page number or use the Arrows to move between pages.
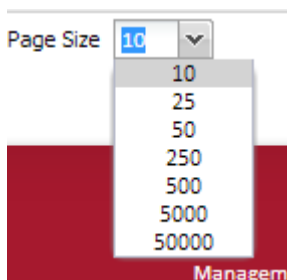
Allows user to determine total number of records displayed per page by the system by selecting a value from a predefined enumeration list.

Provides count of which records are being viewed and total number of records.

1.7 Exporting/Saving Results to a File
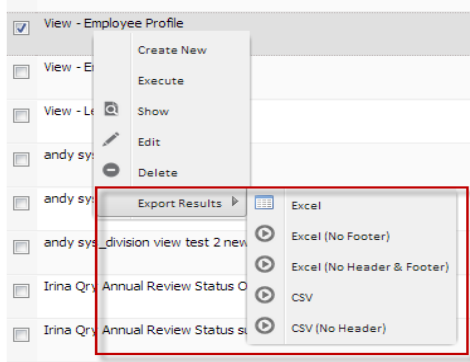
By Clicking Export in the drop-down Menu a user is provided with available export options.

User will select a desired export format.

NOTE: Export results will be saved as a file to user's local computer.
File naming convention is:

Query Name_YYYY_MM_DD_HH-MM-SS
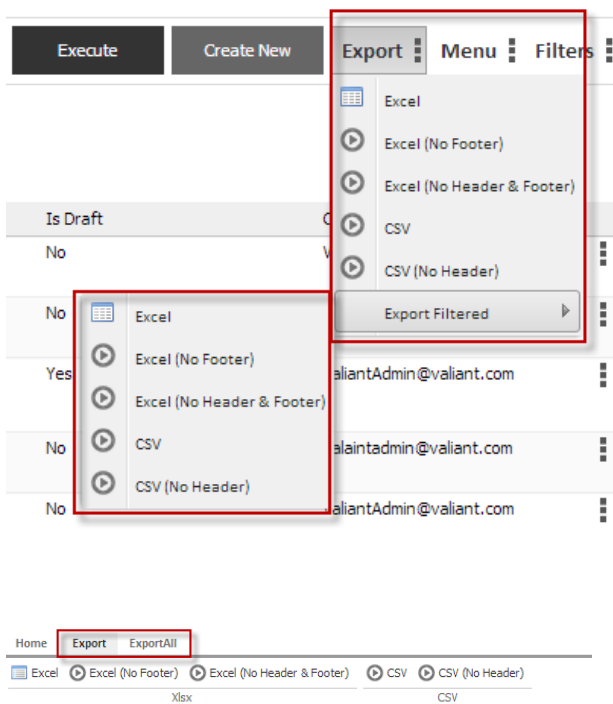
Export function is available from the Main Menu as well. Click on the Export drop-down located on the main Menu and select a desired export file format.

'Export Filtered' downloads the resulting data extract with applied filters (if any).

'Export' downloads the resulting data extract with applied filters (same as 'Export Filtered' above).

'Export All' exports the original complete set of output data regardless of any filters applied previously to the result set.

NOTE: By selecting "Excel /no Footer" option, numeric total sum fields will be excluded from the end of the file.

NOTE: By Selecting "Excel /no Header & Footer" or "CSV /no Header" options, column names will be excluded from the top of the file as well as numeric total sum fields will be excluded from the end of the file.

2. My Profile
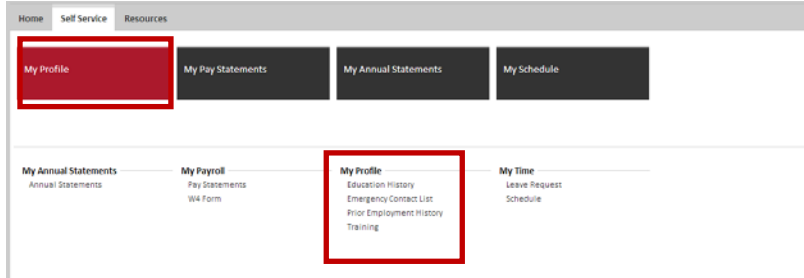
Profile provides access to your employee information, which may be reviewed and monitored for accuracy. This data includes your primary personal contact information, emergency contacts, prior employment and education.

The profile is a read only presentation and any changes required should be submitted to your Human Resource representative for system update.

Self Service
Personal

JASON GERMAN

Address 1:	110 CROSSWAYS PARK DRIVE
City:	SAN FRANCISCO
State:	CA
Zip:	98798

My Profile provides you with your detailed contact information currently on file with your employer.

Personal Form
Personal
Map

Additional Attributes
Education History
Emergency Contact List
Prior Employment History

System Attributes
Audit Trail
User Notes

Profile

Social Security Number:	XXX-XX-9049	Show	🔒
Last Name:	GERMAN		
First Name:	JASON		
Middle Initial:			

Address

Address 1:	110 CROSSWAYS PARK DRIVE
Address 2:	
Address 3:	
City:	SAN FRANCISCO
State:	CA
Zip:	98798

Personal Form
Personal
Map

Additional Attributes
Education History
Emergency Contact List
Prior Employment History

The left column allows you to select and navigate to the additional records.

Personal Form
Personal
Map

Additional Attributes
Education History
Emergency Contact List
Prior Employment History

So for instance, selecting 'Emergency Contact List' will present the related records currently on file with your employer.
Please contact your employer to add or modify any of these records.
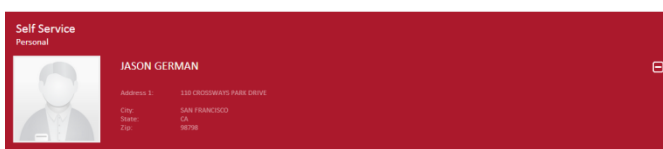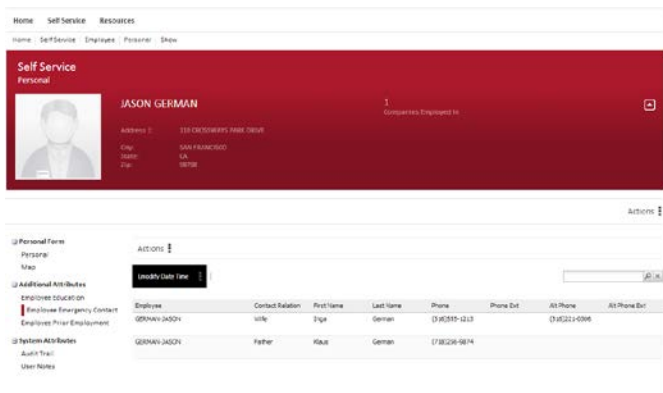
Headline presented at the top of the record brings forward relevant information on each of the records you may navigate to and you may also choose to expand or collapse this header as desired.

To Expand or Collapse, you will select the icon which will then collapse the header and appear as such.

In contrast, select and the header will be restored to the full display.

2.1 **Education History**

Education History provides a list view of all educational records on file with your employer.

Self Service
Education History NYU

By clicking on any record listed you can view the details.

Education History Form
  Audit

System Attributes
  Audit Trail
  User Notes

Details

School Name:	NYU
Graduated:	Yes
Degree Acquired:	BACHELORS
Year Of Graduation:	2008
Years:	3
Gpa:	3.5

2.2 Emergency Contact List

Self Service
Emergency Contact List

Emergency Contact List provides a list view of all emergency contacts on file with your employer.

Self Service
Emergency Contact List GERMAN-JASON

By clicking on any record listed you can view the details.

Emergency Contact List Form
  Audit

System Attributes
  Audit Trail
  User Notes

Details

Contact Relation:	Wife
First Name:	Inga
Last Name:	German
Primary Telephone:	(516)555-1213
Primary Telephone Ext:	
Additional Telephone:	(516)221-0306
Additional Telephone Ext:	

2.3 Prior Employment History

Self Service
Prior Employment History

Prior Employment History provides a list view of all your prior employment records on file with your employer.

By clicking on any record listed you can view the details.

2.4 Training

You may view your existing training records within the Self Service Module. This is extremely helpful when you are notified via alert that your training is up for renewal and wish to review your training detail records.

Self Service
Training 08/21/2012

By clicking on any record listed you can view the details.

□ **Training Form**
   Audit

□ **System Attributes**
   Attachments
   Audit Trail
   User Notes

Business Unit: CALIFORNIA-CALIFORNIA

▲ Details

Training: FIREARM-FIREARM SAFETY 101

Location Of Training:

▲ Dates

Training Date: 08-21-2012
Expiration: 07-21-2013
Warning: 04-21-2013
Renewal: 05-21-2013

▲ Testing

Ceu: 300
Instructor:
Test Score:
Hours: 1.00
Cost: $0.0000
Certification Earned: No

Notes:

3. My Payroll

3.1 Pay Statements

Provides immediate access to view and/or print your pay statements.

To Display and Print a selected Pay Statement, you will right click on the selected record and execute the "Display Pay Statement" action.

▶ Display Pay Statement
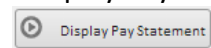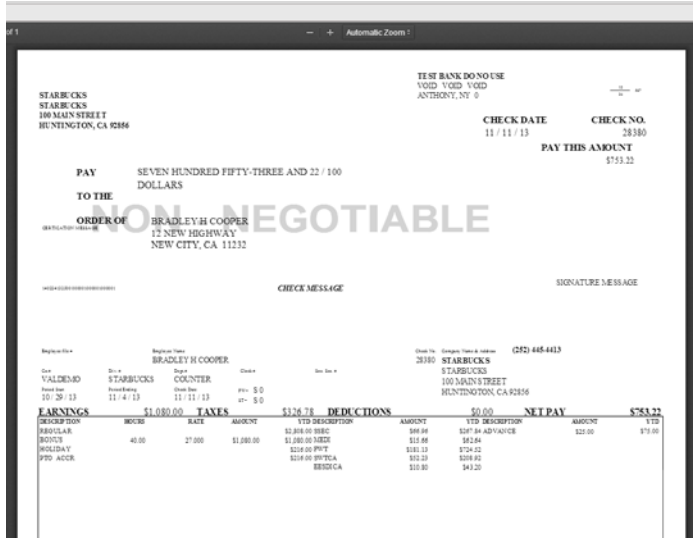
This will launch the PDF viewer dialog box and present the selected Pay Statement

Options on the top right of the dialog box will allow user to print or download the selected statement.

Note: No downloads or plug ins are required

3.2 **W-4 Form**

Form W4 allows you to view existing W-4 forms on file with your employer.

4. My Annual Statements

4.1 Annual Summary

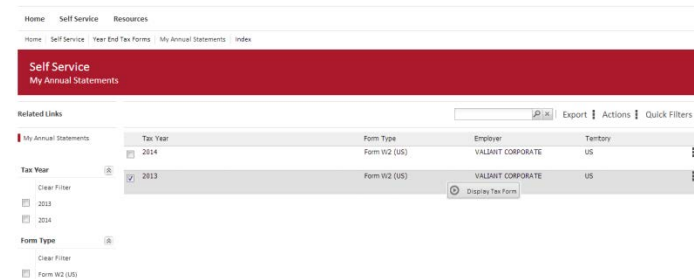Provides an annual summary reporting of Wages, Withholding and Benefits for a given tax year.

To Display and Print the Annual Summary, you will right click on the selected record and execute the "Annual Summary" action.
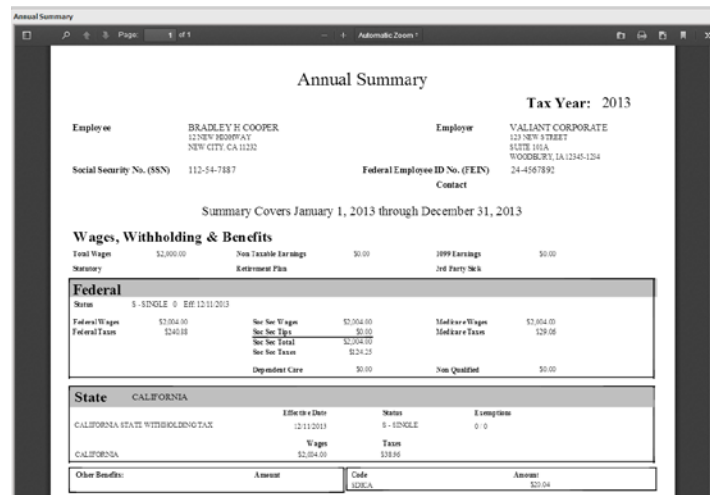
4.2 Annual Statements

Provides you with access to view and / or print annual tax forms including the form instructions.

To Display and Print a selected Tax Form, you will right click on the selected record and execute the "Display Tax Form" action.

Note: For Tax Forms prior to 2012 you will need to contact your Administrator. You may use the Annual Summary report for reporting on annual tax information.

Page 2 of the form will include the Form Instructions.

5. My Time

5.1 Leave Request

Selecting Leave Request from the Self Service main page, under the My Time category, will direct you to a list view of all your leave request records. From here you can select an existing record or opt to Create a Leave Request.

You may request leave within the Self Service Module. By selecting the appropriate business unit and Leave Reason you can then enter a date range for the duration of the leave request. The system will alert you if the Leave type they are requesting is not part of your earning profile. Once a date range has been entered you must then select Create Leave Request.

The next screen will show you the details of the leave including the following status values contained within the headline of the request:

Balance @ Last Payroll - This will show your balance available at the last check date.

Status	Options	Owner
Un submitted	Submit or Delete	Employee
Submitted	Rescind	Employee
Submitted	Approve or Deny	Manager
Approved	No Changes	
Denied	No Changes	

Status - This will show the current status of the Leave Request.
Approved Hours - The number of hours currently approved prior to the next payroll process.
Pending Approval (Hours) - The number of hours waiting for Manager Approval.
Available Balance (Hours) - The amount of Hours that you will be able to now request.
You may make changes to the hours requested on a daily basis by selecting the Daily Time Details. By default the daily duration is set to 8 hours. You may modify the hours if a full 8 hour day is not to be utilized.

Once you submit the leave request (by selecting Submit from the action menu or right-clicking on the request from the list view) your direct manager will receive an email alert notifying them of the pending request. At this point your manager will either approve or deny the request for leave. You will receive an alert email with your manager's decision.

You may delete un-submitted requests and rescind your submitted requests until they are approved or denied. Any action required after this must be addressed directly with your manager as per the company's policy for leave request changes after approval.

You may create multiple leave requests as long as they do not exceed the Available Balance that is set by the accrual policy established within the payroll module.

5.2 **Schedule**

To access your Schedule, you can either select Schedule from the Self Service main page, under the My Time category or simply click on the "My Schedule" action from the Main Self Service menu.
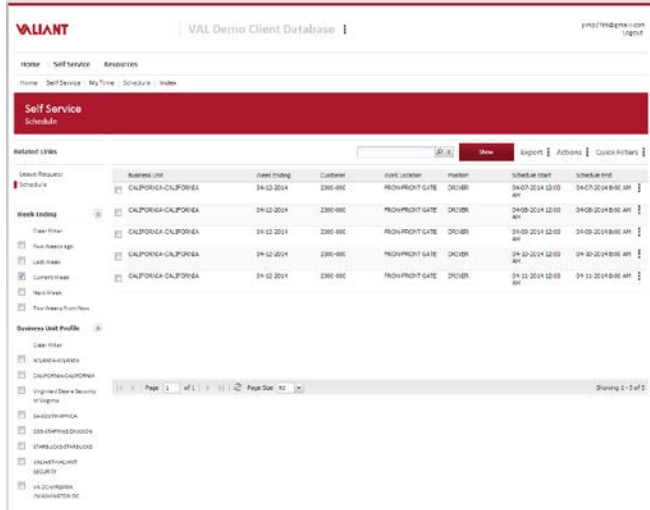
From the Schedule list view results, you can easily see your work schedule by week ending and work location. The results of this view will be defaulted to your current weeks schedule and can be easily filtered by week ending period - current week, last week, next week and so on. You also have the ability to filter by business unit if the schedule spans multiple business units. Selecting one row will show you the specific details for that single work location and week ending period. The same sorting and column filtering is available similar to the other lists. The export option allows you to export the schedule to another format if desired.
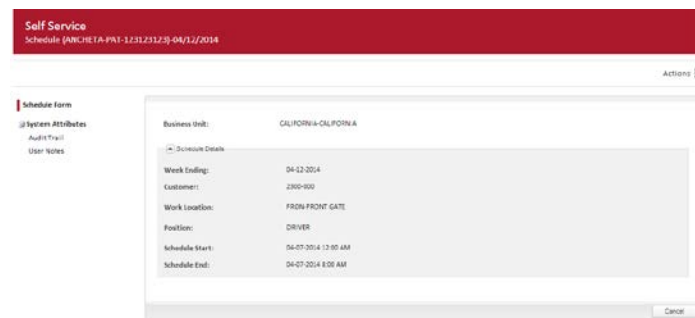
6. Resources
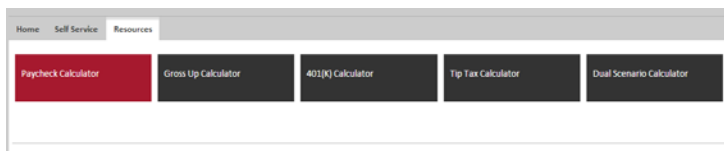
The Resource module of the portal includes 5 Payroll Paycheck Calculators including (Paycheck, Gross Up, 401K Planner, Tip Tax and Dual Scenario Calculators) to assist you in better understanding your paycheck and for planning payroll withholding changes.

Selecting one of the five calculators will prompt a corresponding dialog box with both a descriptive overview of the calculator on the left and the actual calculator tool on the right.

Once all information necessary has been entered into the calculator you can select to "Calculate" or "Clear" to re-enter information.

Once the computed results are displayed you may choose to enter "New Calculation" or "Print".

New Calculation
Redirects you back to Calculator to review and /or enter new information to calculate

Print Options

SSN	Employee No.	Pay Rate	Date	Check No.

Earnings	Current	Deductions	Current	Annualized
Gross Pay	$510.00			$26,520.00
		Federal	61.28	3,186.56
		FICA	31.62	1,644.24
		Medicare	7.40	384.80
		New York	17.72	0.00
		NY SDI	0.60	31.20
		Net Pay	391.38	20,351.76

Prompts to Preview the calculated results and select to print or download.

7. Support

Please contact your employer for additional support or guidance on the Self Service Portal.