MyView

Guidance Document

Document Name	MyView Guidance Document
Author	
Location	
Version	
Date	

Contents

1 Introduction

MyView is a self-service facility for use by all staff. It is accessible over the internet using https://myview.shropshire.gov.uk/dashboard/ web address.

All Employees' will be able to:

- View and print their payslip;
- View and print their P60s;
- View and update their bank details;
- View and update their contact details (e.g. address);
- View and update their personal details (e.g. known as name);
- View and update their emergency contacts;
- View and submit mileage and expenses claims;
- View their employment history and training records.

Managers will be able to:

- View their team structures;
- View employee records with the exception they cannot view payslips, equalities details and bank details;
- View and authorise employee mileage and expenses claims;
- Update staff contract details;
- View employee training history

2 Conditions of Use - Managers

Any personal or sensitive information within MyView should at all times be treated as confidential and protected from unauthorised disclosure (in the event that you are uncertain as to whether information could be categorised as personal or sensitive you should seek guidance from your immediate manager or Human Resources). It is an express condition that you treat the information that you encounter as confidential and with the appropriate level of sensitivity.

Any unauthorised disclosure of personal or sensitive information would be considered an act of gross misconduct, which would be dealt with under the disciplinary procedure.

3 Managers Guidance

As a manager you can:

- View your team structures and employee records;
- View management reports, including team members' sickness records;
- View and authorise employee mileage and expenses claims;

- Update staff contract details.

View of My People

- This is a view of the employees you line manage. You can also view employee records that are your responsibility but not in your immediate line management. These can be viewed by clicking on 'Show Reports' of their line manager or by changing the Filters options at the top of the page;
- You can only view a team structure if you have line management responsibility for a team;
- You cannot view the employee payslips, bank details or equalities information. It is also not possible for a manager to update any details;
- If you have any queries relating to the content of your team, please email MyView.Payroll@shropshire.gov.uk

Where can I access MyView?

- You can access MyView from any PC with internet access. However, as a manager you have additional access that enables you to view individual employee's personal information. Therefore, you **should only** access this additional functionality using Shropshire Council IT equipment;
- You can access and update your own personal details with no restriction;
- Please see the Conditions of Use above which you need to comply with when using MyView.

4 MyView Login and First Time User Process

1. Access MyView via the internet using https://myview.shropshire.gov.uk/dashboard/
2. Or from the intranet home page;
3. Click on the **'forgotten password'** link;
4. Enter your employee number (7 digits) and click on '**reset my account'**. A confirmation message will be displayed telling you that an email containing a temporary password has been sent to your inbox. This password will last for 2 hours. If it is not used in that time you will need to complete the procedure again. Click on '**Continue'**.
5. Open the forgotten password email. Highlight the new password. Click on the right hand side of your mouse and select '**Copy' taking care to only select the password characters and numbers and not any spaces at the end or beginning of the character combination**;
6. Go to the MyView login screen and enter your **employee number**;
7. Tab down to the **Password** field. Right hand click your mouse and click on '**paste'** to paste the copied password;

8. Click the ‘**Log’** in button;
9. Enter your **date of birth** in the format of DD/MM/YYYY e.g. 01/01/1970 and click on **‘Verify my details’;**
10. The Security Validation page appears. Answer the security validation questions, remembering that this is case sensitive. Click on **‘Set my user questions’;**
11. The **‘Change your password’** screen is then displayed;
12. In the **Old Password** field, paste the temporary password you used to log into this session;
13. Enter a **new password** (must contain at least 6 characters, 2 numbers
14. and 1 capital letter);
15. Enter the new password again and click on ‘**Submit’;**
16. A confirmation message will be displayed, click on ‘**continue’** to access your MyView page.

5 Forgotten Password

1. If you have forgotten your password please follow the instructions as above in **4. My View Login and First Time User Process**
2. If you require any further help accessing MyView please contact the MyView helpdesk via:

Email: MyView.Payroll@shropshire.gov.uk
Telephone: 01743 252190

6 Suspended Account

If your account has been suspended click on the Forgotten Password command and go through the process as described above. This will un-suspend your MyView account.

7 Locked Account

Your account will be locked after three unsuccessful attempts to complete the Forgotten Password process. If your account is locked you need to email MyView.Payroll@shropshire.gov.uk making sure the email content says that your MyView account has been locked. You will be contacted back when the account has been unlocked.

8 Changing Your Password or Answer to Memorable Questions

You need to be logged in to MyView to update these details. Click on the Account button in the top right hand side of the screen.

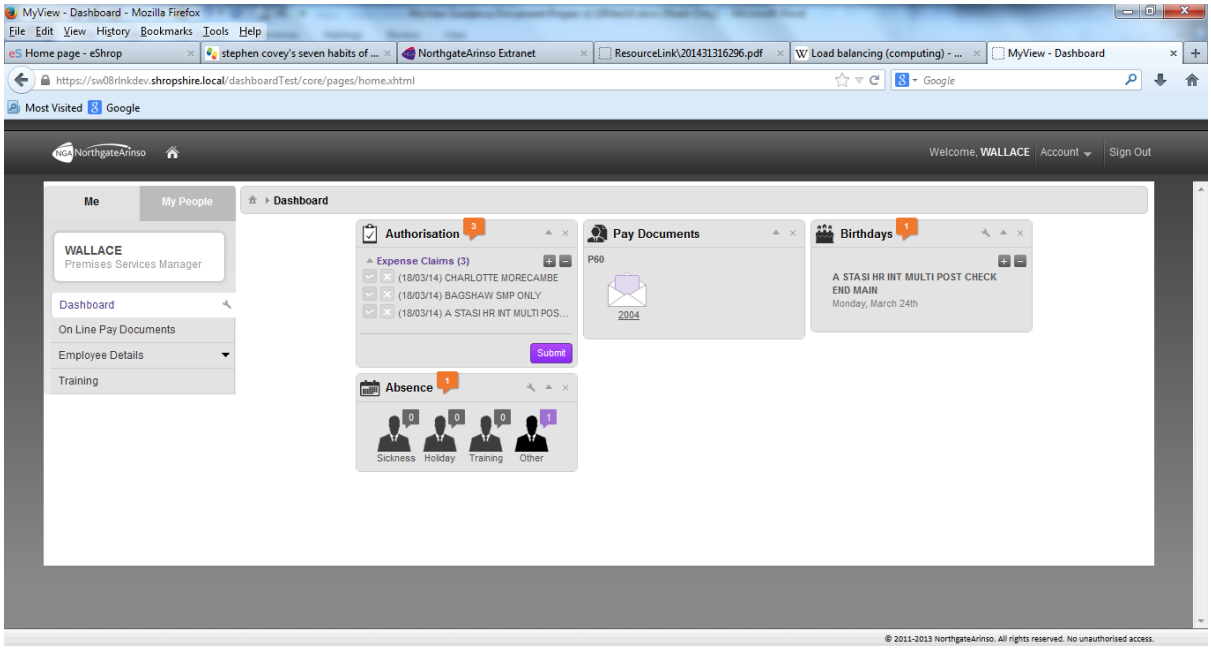
8.1 Change Password

Select Change Password from the selection list. Complete the fields as displayed on the screen.

8.2 Update Memorable Questions

Select Update Profile from the selection list. Record the new details for memorable name or place. You will need to record your current password to confirm these changes.

9 MyView Dashboard



The first screen that is displayed is the MyView Dashboard. There are shortcuts on this page that can be customised or removed if not required.

You can customise some of the widgets to view the levels of staff you have responsibility for. This is done by clicking on the spanner icon in the menu bar to configure the view.

These shortcuts can be removed if required by clicking on the cross in the menu bar. To re-display the shortcut click on the Spanner symbol next to the word Dashboard and the Available Widgets selection will be displayed.

10 Viewing Your Personal Details Screens

Selecting Personal Details title bar will allow up to view and update the following details.

10.1 Personal Details

Any change of name or personal details can be updated here;

- If you amend any details you must click on the '**Submit'** button at the bottom of the page;
- Any changes will be either be automatically updated or notified to Employment Services for authorisation and if there is a change of name you will be required to provide evidence of this such as a marriage certificate;
- Your details will not be updated until they are authorised by Human Resources.

10.2 Contact Details

You can update your home address and telephone contact details on this screen;

- **Do not include** any characters in your address details, i.e. commas, full stops;
- If you amend any details you must click on the '**Submit'** button at the bottom of the page;
- You can update your home, work and mobile telephone numbers on this screen;
- Any changes will be automatically updated.

10.3 Emergency Contact Details

You can add, update or remove emergency contact details on this screen;

- To add details click on the '**Add Contact'** a new screen will be displayed. Complete name and telephone fields as a minimum;
- When all details have been added click on **'Save Contact'** button at the base of the screen. Then you will need to click on the **'Submit'** button at the base of the next screen for the change to be updated;
- You can enter more than one contact by clicking on '**Add Contact'** and completing the fields as described above;
- You can update or remove your emergency contact details on this screen. Click on the title under the **'Relation'** column and then you can update the details or click on the 'remove contact' button to remove the contact;
- It is important that when all details have been updated the **'Submit'** button is selected in order for the changes to be updated.

10.4 Equality & Diversity

You can add/update your equality details here;

- When all details have been updated click on the **'Submit'** button.

10.5 Bank Details

You can add/update your bank details here;

- When all details have been updated click on the **'Submit'** button.
- Please note –
- If your account is with a building society, you **must** ensure you supply a 'Building Society Roll Number'.
- If you change your bank details **after** the 12th of the month, it may not be changed until **after** your next pay date.

11 Online Pay Documents

Selecting this option will allow you to view current and historic payslips and P60 details. Follow the onscreen instructions to access the details.

12 Car Mileage and Expenses

Selecting this option will allow you to submit and review any previously submitted expenses forms. Onscreen instructions and guidance notes are attached to assist in this process.

13 Training Details

This is a view only screen of all courses that you have been booked on to, have requested to attend, attended or cancelled. There is also a view of a calendar where you can view the courses or any sickness absence you have had.

Within the calendar you will be able to select additional details for the courses by clicking on the date the course is booked on.

14 MyView Form History

This screen contains a history of any forms submitted by you or on your behalf. There is a search criteria within this screen that allows you to narrow down the types of forms, e.g. Expenses or Personal Details, and the status of the form, authorised, rejected, open as examples.

If s form is in a submitted state requiring authorisation it is possible to see where the form is in the authorisation route. To do this click on the downward facing arrow to the right hand side of the line being reviewed. The line will expand to display the

authorisation progress. Clicking on the nodes will display additional details defining with who the form is with.

15 Training

To view any history of training that has been recorded against your record in the HR computer system select the Training menu. A calendar of courses and history or requested, attended and cancelled courses will be available.

16 Authorisation

Selecting this command will display items awaiting authorisation.

17 Delegation of Action

If you have access to this task
It will allow you to create delegate rules for authorisation of expenses or other details. To complete this click on Add New and in the following screens select, Authorisation in the Rule Type and then give this rule a description. Search and select the person you are delegating this access to, be aware of rules regarding the level of staff you can delegate to. In the Delegates For click on Select to choose the people who this person will be responsible for. In the Modules and Process Groups field click on Select and from the following list select the module you wish to delegate to. From and To dates can be recorded if this is only for a limited period of time. Once complete click on Submit to save the changes.

18 Electronic Forms

If you have access to this task
Use it to complete a form for post creation.

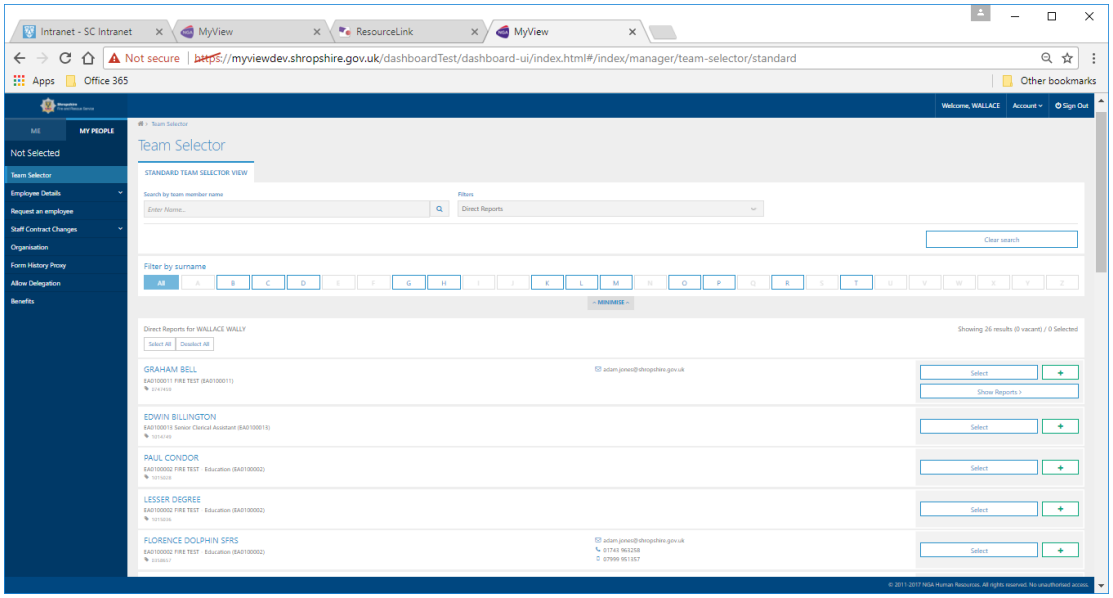
19 Links to Other Useful Sites

There is also a list of links to other useful web sites available to select from.

20 As a Manager – Viewing Your Team Details

As a manager you are able to view details regarding your team and also update their contract information.

To access this information from the first Dashboard screen select MyPeople; this can be found to the left of the screen next to the Me tab. The view will be of the employees you immediately line manage. That view can be updated by changing the filters at the top of the screen.



20.1 View Employee Personal Details

From the left hand menu click on Employee Details, depending on your access rights will depend on what additional menus are displayed;

1. Click on the item that you want to view, e.g. Name Details, or Emergency Contact Detail and a team structure will now be displayed;
2. To select the person click on the radio button next to their name. To view the selected details click on **Next** button towards the right hand side of the screen
3. If the person is not immediately line managed by you click on the Plus button next to their line managers name and navigate through the structure until you see the employee;
4. When complete click on **Cancel** to return to the employee search screen. Repeat this process for other details to be viewed.

20.2 Update Employee Contract Details

If you have the relevant authority you are able to update a persons contract details or move them to new posts in your line management structure or from another team.

To do this select one of the contract change menus from the list. The list of contract changes are:

- External transfers & additional posts
- Employment contract changes and additional posts
- Leavers;

- New starters and re-joiners;
- New posts within team;
- New post within organisation.

Once the action has been selected guidance notes will be available on screen.

20.3 View Persons Training History

- Click on Team Selector to view the employees you manage. This is the same view as when first accessing the MyPeople page;
- To view their training history click **Select** next to the persons name and from click on Training button on the left of the screen. To exit this view click on Team Selector and then deselect the employee.

20.4 View Persons Expenses History

- Click on Team Selector to view the employees you manage. This is the same view as when first accessing the MyPeople page;
- To view their training history click **Select** next to the persons name and from click on Training button on the left of the screen. To exit this view click on Team Selector and then deselect the employee.

20.5 View a Persons Emergency Contact Details

- Click on Team Selector to view the employees you manage. This is the same view as when first accessing the MyPeople page;
- Click on the Person Details to access the Emergency Contact Details menu Employee Form History

Any form the employee has completed or has been completed on their behalf can be viewed within MyView by selecting the Employee Form History menu.

The types and status of the form displayed can be amended using the filter options at the top of the page.

To view the form details click persons name of form description in the detail column.

To view the authorisation status of the form click on the arrow to the right of the line; additional details will be displayed. Clicking on the nodes will display another screen highlighting where the form is in the authorisation process.