

IMS PAYROLL

online express

IMS Online Express

**Employee
user guide**

POWERED BY



www.timefiler.com

Table of Contents

Logging into IMS Online Express	3
Web address	3
Login details	3
Changing your password.....	3
IMS Online Express screens	4
Leave Requests	5
E-mail alerts	5
Apply for leave.....	6
Partial Day Leave Request.....	7
Withdraw a Leave Request	10
General information	11
Alerts & warnings	11
Colour coding on the Leave Planner calendar	12
Navigation tips.....	12
Print leave screens.....	13
Frequently asked questions	14
View Actual Leave History.....	15
My payslips.....	16
My documents	16
Print your details.....	17
Notify changes to your details	18
Logging out of IMS Online Express.....	19

Logging into IMS Online Express

Web address

Your Payroll Administrator will advise the web address for logging into IMS Online Express.



You can log into IMS Online Express from anywhere where there is an internet connection.

Login details

Your login name is your IMS Payroll employee number.

The first time you log into IMS Online Express, your password is your IRD Number. If you don't know your IRD Number, please contact your Payroll department.

After you have successfully logged in for the first time, you will be prompted to change your password. Make sure the password is secure, and remember, it is case-sensitive.



If you forget your password, please contact your Payroll department so that it can be reset.

You have nine opportunities to enter a password before you will be locked out of the system.

Changing your password

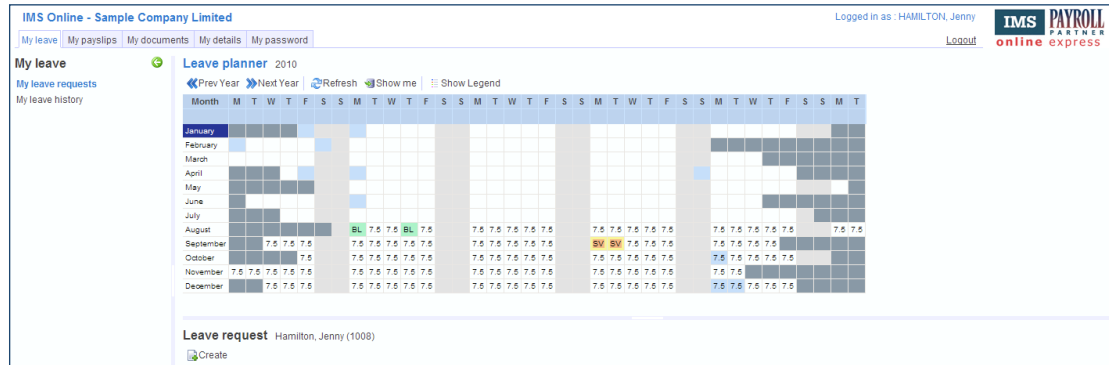
You can change your password at any time when logged into IMS Online Express.

Click on the 'My Password' tab page, and enter new password details:

Field	Explanation
Current password	<ul style="list-style-type: none"> Enter current password (case-sensitive)
New password	<ul style="list-style-type: none"> Enter a new password that will apply from next login into IMS Online Express. Ensure it is secure.
Confirm password	<ul style="list-style-type: none"> Re-enter your new password.

Press **Save**.

IMS Online Express screens



The following screens are available in IMS Online Express:

- **My leave**
 - *Apply for leave online*
 - *View past, current and future Leave Requests*
 - *Check the status of Leave Requests (not approved, approved)*
 - *View scheduled days of work*
 - *View actual leave history payments*
- **My payslips**
 - *View payslips online*
- **My documents**
 - *View documents online (for example, company policies, newsletters etc)*
- **My details**
 - *Review personal payroll details*
 - *Notify Payroll department if changes are required*
- **My password**
 - *Change password details*



If you are a Manager, you will see additional screens.
Please refer to the Manager guide for further information.

Leave Requests

The following functionality is available for employees on the **My Leave Requests** tab page:

- Apply for leave online
- View past, current and future Leave Requests
- Check the status of Leave Requests (not approved, approved)
- View scheduled days of work

E-mail alerts

E-mails will be generated from IMS Online Express when the following actions are undertaken:

- **You submit a Leave Request**
 - An e-mail will be sent to your Manager (and copied to your Assistant Manager if you have one) advising them of your Leave Request.
 - If you add a comment, this will be included in the e-mail text.
- **You withdraw a Leave Request**
 - An e-mail will be sent to your Manager (and copied to your Assistant Manager if you have one) advising them you have withdrawn your Leave Request.
 - Your comment will be included in the e-mail text.



You will only receive an e-mail if you have an e-mail address set up in IMS Payroll (likewise, your Manager will only receive an e-mail if they have an e-mail address set up as well).

Check that your e-mail address is stored correctly by checking My Details (refer to section in this document for further information).

My details	
CLARK, Andrea	
First Names: Andrea Preferred Name: Andy Address: 1234 Te Awa Road RD7 Best Town	Surname: Clark Employee Number: 1015 Gender: Female Birth Date: Email Address:
Phone Number: 02 369 8524 Occupation: Admin Assistant Tax Code: M	Mobile Number: Start Date: 2/07/2007 IRD Number: 023-489-643



Apply for leave

To create a Leave Request, click **My leave requests** on the **My leave** tab page:



IMS Online - Sample Company Limited

My leave | My payslips | My documents | My details | My password

My leave

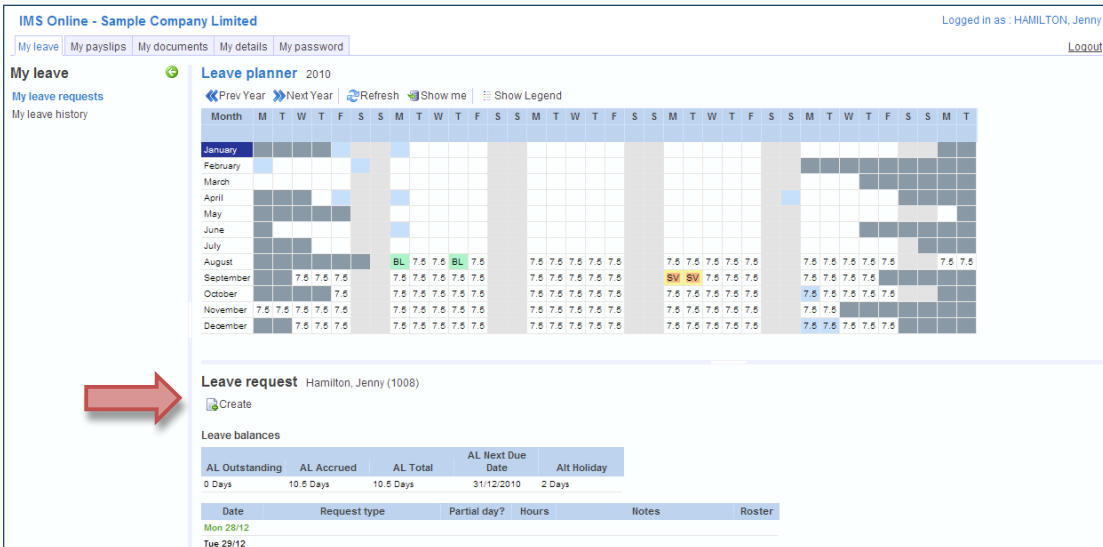
My leave requests
My leave history

Leave planner 2010

Prev Year | Next Year | Refresh | Show me | Show Legend

Month	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T
January																							
February																							
March																							
April																							
May																							
June																							
July																							
August																							
September																							
October																							
November																							
December																							

The annual Leave Planner screen will display. Click on the date that you wish to take as leave, and then click the **Create** button to create the Leave Request:



IMS Online - Sample Company Limited

My leave | My payslips | My documents | My details | My password

My leave

My leave requests
My leave history

Leave planner 2010

Prev Year | Next Year | Refresh | Show me | Show Legend

Month	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T
January																							
February																							
March																							
April																							
May																							
June																							
July																							
August																							
September																							
October																							
November																							
December																							

Leave request Hamilton, Jenny (1008)

Create

Leave balances

AL Outstanding	AL Accrued	AL Total	AL Next Due Date	Alt Holiday
0 Days	10.5 Days	10.5 Days	31/12/2010	2 Days

Date	Request type	Partial day?	Hours	Notes	Roster
Mon 28/12					
Tue 29/12					

The Leave Request details window will display:

Select leave request details

* Reason : AL

* Start Date : 13/12/2010

* End Date : 17/12/2010

Comment : Shopping trip to Melbourne

Part-day details | Submit | Cancel

Field	Explanation
Reason	<ul style="list-style-type: none"> Use the dropdown arrow, or enter a ?, to view available leave reasons. Alternatively, start typing the leave reason name.
Start date	<ul style="list-style-type: none"> Use the calendar button to select a date for the first day of the Leave Request period. Alternatively, simply type the date into the field (dd/mm/yyyy).
End date	<ul style="list-style-type: none"> Use the calendar button to select a date for the last day of the Leave Request period. Alternatively, simply type the date into the field (dd/mm/yyyy).
Comment	<ul style="list-style-type: none"> Add a comment for the Leave Request if required.

You can then decide on the following actions for the Leave Request:

Action	Explanation
Submit the Leave Request to your manager	<ul style="list-style-type: none"> Click the Submit button. An e-mail will be sent to your Manager, notifying them of the Leave Request. You will receive an e-mail when your Manager has approved/declined the Leave Request.
Enter partial day details	<ul style="list-style-type: none"> Click the Part-day details button. Refer to the Partial Day section for further information.
Change Leave reasons for one or more days on the Leave Request	<ul style="list-style-type: none"> Click the Part-day details button. Change the leave reason for the relevant days. Click Save to submit the Leave Request at a later time, or click Submit to submit the Leave Request to your manager.
Save the Leave Request, ready to Submit in the future	<ul style="list-style-type: none"> Click the Part-day details button. Refer to the next section for further information.
Cancel the Leave Request	<ul style="list-style-type: none"> Click the Cancel button.




Leave Requests cannot be created once the payroll period for the date range has been processed.

Partial Day Leave Request

By default, it is assumed that a Leave Request is for an entire day, based on standard hours for the day. However, from time to time, you may wish to apply for a partial day, for example, a half day Annual Leave.

After filling in the Leave Request details, instead of clicking **Submit**, click the **Part-day details** button instead:



Select leave request details

* Reason :

* Start Date :

* End Date :

Comment :

The following screen will display:

Leave request Hamilton, Jenny (1008) (Unsubmitted - Starts on 13/12/2010 - Ends on 17/12/2010 - Shopping trip to Melbourne)

Leave balances

AL Outstanding	AL Accrued	AL Total	AL Next Due Date	Alt Holiday	
0 Days	10.5 Days	10.5 Days	31/12/2010	2 Days	13/12-17/12

	Date	Request type *	Partial day?	Hours	Notes	Roster
	Mon 13/12	Annual leave	<input type="checkbox"/>			7.5
	Tue 14/12	Annual leave	<input type="checkbox"/>			7.5
	Wed 15/12	Annual leave	<input type="checkbox"/>			7.5
	Thu 16/12	Annual leave	<input type="checkbox"/>			7.5
	Fri 17/12	Annual leave	<input type="checkbox"/>			7.5
						37.5

Let's say Monday 13 December is a partial leave day. Click the **Partial day** checkbox, and fill in the number of hours for the partial day:

Leave balances

AL Outstanding	AL Accrued	AL Total	AL Next Due Date	Alt Holiday	
0 Days	10.5 Days	10.5 Days	31/12/2010	2 Days	(Changed) 13/12-17/12

	Date	Request type *	Partial day?	Hours	Notes	Roster
	Mon 13/12	Annual leave	<input checked="" type="checkbox"/>	3	This partial day equates to 0.5 days Annual Leave	7.5
	Tue 14/12	Annual leave	<input type="checkbox"/>			7.5
	Wed 15/12	Annual leave	<input type="checkbox"/>			7.5
	Thu 16/12	Annual leave	<input type="checkbox"/>			7.5
	Fri 17/12	Annual leave	<input type="checkbox"/>			7.5
				3		37.5

Click **Submit** to submit the Leave Request to your manager, or click **Save** to submit the Leave Request at a later date.



Upon clicking Submit, an e-mail will be sent to your Manager. You will receive an e-mail when your Manager has approved/declined the Leave Request.

Note that a red critical warning is displayed under the following scenarios:

Scenario	Action
Partial day flag ticked, no partial day hours entered	<ul style="list-style-type: none"> If today is a Partial Day, enter the number of hours for the Partial Day. If today is not a Partial Day, untick the Partial Day check box by clicking on it again.
Partial day hours entered,	<ul style="list-style-type: none"> If today is a Partial Day, tick the Partial Day check box.

Partial day flag not ticked	• If today is not a Partial Day, delete the value in the Hours field.
-----------------------------	---



When a coloured warning is displayed, hover over the coloured alert to view the message.

A yellow warning is for information purposes only.

A red warning is a critical warning, and it must be addressed before saving the Leave Request.

Withdraw a Leave Request

To withdraw a Leave Request, click **My leave requests** on the **My leave** tab page, and then click on the **relevant Leave Request**:

The screenshot shows the IMS Online interface for Sample Company Limited. The user is logged in as HAMILTON, Jenny. The 'My leave' tab is active, showing 'My leave requests'. A 'Leave planner' for 2010 is displayed, showing a calendar grid with various leave types (BL, SV, AL) and balances. Below the calendar, a specific leave request is shown for Hamilton, Jenny (1008), submitted on 13/12/2010, ending on 17/12/2010, for a shopping trip to Melbourne. The 'Withdraw' button is highlighted with a red arrow.

Leave balances

AL Outstanding	AL Accrued	AL Total	AL Next Due Date	Alt Holiday
0 Days	10.5 Days	10.5 Days	31/12/2010	2 Days

Leave request details: Hamilton, Jenny (1008) (Submitted - Starts on 13/12/2010 - Ends on 17/12/2010 - Shopping trip to Melbourne)

Date	Request type	Partial day?	Hours	Notes	Roster
Mon 13/12	Annual leave	Yes	3		7.5
Tue 14/12	Annual leave				7.5
Wed 15/12	Annual leave				7.5

Click the **Withdraw** button:

Add a **Comment** to explain why you are withdrawing the Leave Request, and then click **OK**.

Withdraw leave request with comment?

* Comment :



You will not be able to withdraw the Leave Request unless a comment is added. An e-mail will be sent to your Manager notifying them that the Leave Request has been withdrawn.

Your comment will be included in the e-mail sent to your Manager advising them the Leave Request has been withdrawn.

General information

Alerts & warnings

As Leave Requests are created, coloured warnings will display from time to time. There are two types of warnings that may be displayed:

- **Critical (red) warning** – this warning must be addressed; you will not be able to save or submit your Leave Request until it has been resolved.
- **Information (yellow) warning** – this warning is for information purposes only; you should read the warning, take action if necessary, otherwise save or submit your Leave Request as normal.



When a coloured warning is displayed, hover over the coloured alert to view the message.

IMS Online Express may display the following possible warnings and alerts throughout the Leave Request process:

Critical warnings:

Warning	Reason
Please only enter Hours for a Partial Day request	<ul style="list-style-type: none"> • The number of hours for the Partial Day request has been entered, but the Partial Day check box has not been ticked.
Please enter Hours for a Partial Day request	<ul style="list-style-type: none"> • The Partial Day check box has been ticked, but the number of hours for the Partial Day request has not been entered.
Partial day hours may not be higher than Rostered hours (xx hours)	<ul style="list-style-type: none"> • Shown on Partial Day Leave Requests, when the number of hours entered for the partial day is greater than rostered hours for the day. • Only applies when the leave type is accrued and paid in hourly units. • xxx refers to number of hours rostered for the day.

Information warnings:

Warning	Reason
This Leave Request will not result in a payment (no rostered days)	<ul style="list-style-type: none"> • A Leave Request has been entered, and there are no rostered days included within the Leave Request date range.
This partial day equates to 1 day xxx Leave	<ul style="list-style-type: none"> • Shown on Partial Day Leave Requests, when the leave type is accrued and paid in daily units. • xxx refers to the leave type that is being applied for.
This partial day equates to 0.5 days xxx Leave	<ul style="list-style-type: none"> • Shown on Partial Day Leave Requests, when the leave type is accrued and paid in daily units. • xxx refers to the leave type that is being applied for.
You have exhausted your available xxx, some (or all) will be paid as LWOP	<ul style="list-style-type: none"> • Shown on days where there is insufficient leave in order to pay paid leave for the Leave Request. • This is based on the leave balance as at the last closed IMS pay period. • xxx refers to the leave type that is being applied for. • Applies when a Leave without Pay code exists in the database.

You have exhausted your available xx, some (or all) will not be paid	<ul style="list-style-type: none"> Similar to above, except this warning will apply when a a Leave without Pay code does not exist in the database. xxx refers to the leave type that is being applied for.
Leave will not be deducted, Stat Holiday is payable instead	<ul style="list-style-type: none"> Applies when the Leave Request falls on a public holiday.

Colour coding on the Leave Planner calendar

Colour	Explanation	Colour	Explanation
Reason (no colour)	Request has been created and saved, but has not yet been submitted to your manager	Light grey	Weekend
Orange	Pending request (submitted, not approved)	Yellow border	Validation warning (non-critical) is present
Green	Approved request	Light blue	Public Holiday
<i>Reason (italic and underlined)</i>	Partial day leave request	Dark grey	Day does not belong to the current month

Click the **Show Legend** button to display the colour legend:

The screenshot shows the 'Leave planner 2010' interface. At the top, there are navigation buttons: 'Prev Year', 'Next Year', 'Refresh', 'Show me', and 'Show Legend'. A red arrow points to the 'Show Legend' button. Below the buttons is a calendar grid for the year 2010, with columns for months (M, T, W, T, F, S, S, M, T, W, T, F, S, S, M, T, W, T, F, S, S, M, T, W) and rows for each month from January to September. The grid contains various colored squares representing leave requests. To the right of the calendar is a legend titled 'Hide Legend' with the following items:

- Approved (Green square)
- Partially Approved (Green square with diagonal line)
- No Roster (Grey square)
- No Date (Dark grey square)
- Not Approved (Orange square)
- Public Holiday (Light blue square)
- Unsubmitted (White square)
- Warning (Yellow border square)
- Weekend (Light grey square)

Click **Hide Legend** to remove it.

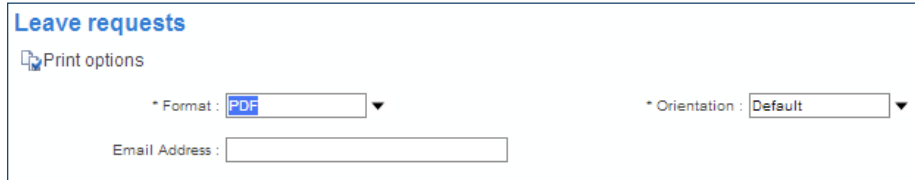
Navigation tips

The following buttons allow you to easily navigate within the calendar screens:

Button	Tips
◀◀ Prev Year	<ul style="list-style-type: none"> View leave data from the previous year
▶▶ Next Year	<ul style="list-style-type: none"> View leave data in the next year
🔄 Refresh	<ul style="list-style-type: none"> Updates leave data, coloured approvals etc
📅 Show me	<ul style="list-style-type: none"> Enter a date to jump to (for example, if you want to look at data from three years previous, use Show Me to enter a date belonging to that year, rather than clicking Previous Year three times.

Print leave screens

Click the **Print** button to output the leave calendar screen as a PDF in an e-mail, or to send to printer for a hard-copy. The following window will be displayed:



Leave requests

Print options

* Format :

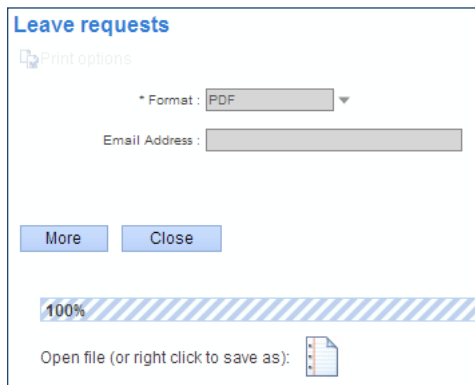
* Orientation :

Email Address :

Field	Explanation
Format	<ul style="list-style-type: none"> Choose from the following formats: <ul style="list-style-type: none"> PDF Excel Screen You would normally choose PDF or Screen to output a calendar screen.
Orientation	<ul style="list-style-type: none"> Leave as Default.
E-mail address	<ul style="list-style-type: none"> If you wish to e-mail a copy of the leave calendar to either yourself or someone else, enter a valid e-mail address into this field. The e-mail will be sent when you click Start.

Press **Start**.

Once the file has been created, a notepad icon will be displayed:




Leave requests

Print options

* Format :

Email Address :

100%

Open file (or right click to save as): 

To open the file in a separate browser window, use your mouse and **left-click** on the notepad icon.

Alternatively, use your mouse and **right-click** to save the file on your local computer.

Frequently asked questions

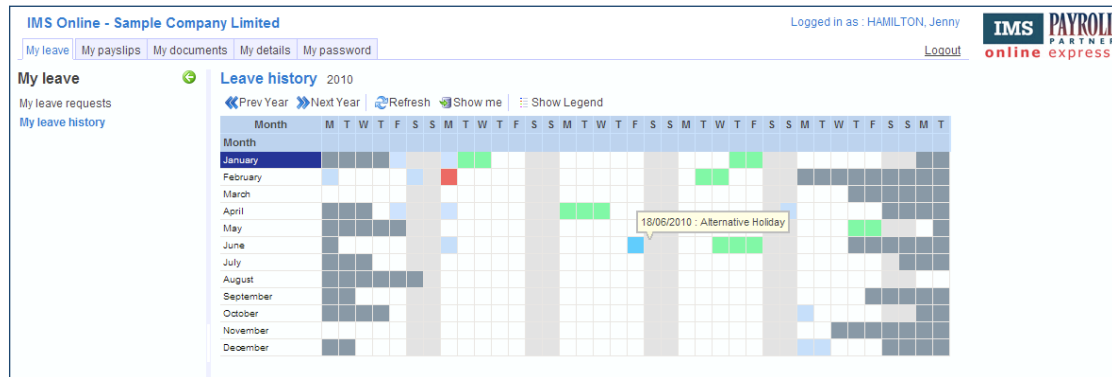
- Q: What are the numbers on the Leave Planner calendar?
- A: *These reflect the number of hours you are rostered for each day.*
- Q: I have applied for Annual Leave at Christmas, but I have now changed my mind and I'd like to come back to work a couple of days earlier.
- A: *You may withdraw the Leave Request, and then create a new Leave Request for the new dates.*
- Q: I want to apply for leave that falls in six months time; does my leave balance reflect what my balance will be at that time?
- A: *No. The leave balance displayed reflects the leave balance as at the last closed pay period in IMS Payroll.*
- Q: I got a warning saying I have insufficient leave for my future Leave Request so Leave without Pay applies. However I will have enough available by the time I take the leave. Why does this warning show?
- A: *The warning is based on your leave balance right now, as at the last closed pay period. Leave payments will be recalculated in the future so if you have sufficient leave by the time the Leave Request is due to be paid, then paid leave will apply.*
- Q: My Leave Request includes a public holiday. Do I have to do two Leave Requests to make sure leave isn't deducted on the public holiday?
- A: *No. IMS Online Express works out that a public holiday is included within the Leave Request, and will pay a Statutory Holiday instead (as long as that day is a rostered day for you). A yellow warning will display alerting you that a Statutory Holiday is payable rather than normal leave.*
- Q: Why can't I see any reason codes when I try applying for leave?
- A: *Are you a casual employee? If so, casuals cannot apply for leave in IMS Online Express. Alternatively, make sure you're not typing letters into the Reason field – IMS Online Express will attempt to shorten the list based on what you type. This means if you have typed say, Q, into the field, no leave reasons meet these criteria. Try entering a ? or use the dropdown arrow instead.*
- Q: What happens if I try to apply for leave during a period for which I am not rostered to work?
- A: *A warning will display since no leave payments are generated for non-rostered days.*

View Actual Leave History



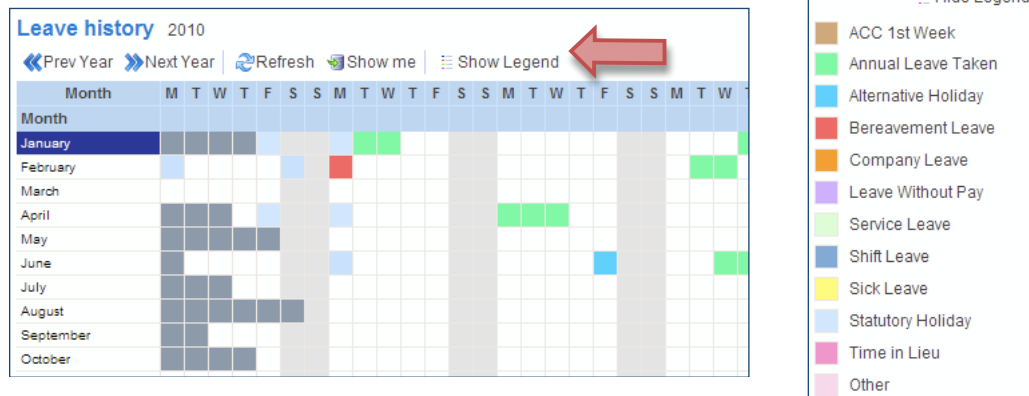
This screen shows Actual Leave that has been paid in IMS Payroll. This may differ from historical Leave Requests in IMS Online if leave has been entered directly into IMS Payroll.

To view Actual Leave History, click **My leave history** on the **My leave** tab page:



You may hover over a coloured cell to view the leave type and date.

Click the **Show Legend** button to display the colour legend:



Click **Hide Legend** to remove it.

My payslips

To view your payslips, click on the **My payslips** tab page:

IMS Online - Sample Company Limited

Logged in as : CLARK, Andrea (as a Manager)

My leave

My payslips

My documents

My details

My password

Logout

My payslips

Clark, Andrea (1015)


Refresh

Payslips

Date	Description	Filename	Opened	Private
 22/08/2010	Payslip for CLARK, Andrea (Week ending 22/08/2010)	Payslip.pdf		Yes
 15/08/2010	Payslip for CLARK, Andrea (Week ending 15/08/2010)	Payslip.pdf	Yes	Yes

Open the payslip by clicking on the relevant payslip link.



Click on the red PDF icon () on the left hand side to open the payslip.

Once payslips have been opened, the Opened field changes to Yes.

It is not possible to delete old payslips.

My documents

To view your documents, click on the **My documents** tab page:

IMS Online - Sample Company Limited

My leave

My payslips

My documents

My details

My password

Logged in as : BLOXHAM, Peter

Logout

IMS PAYROLL PARTNER online express

My messages


Refresh

Documents


Date	Description	Filename	Opened	Private
<div><div></div><div>17/09/2010</div></div>	Loan Agreement	Loan Agreement.pdf	Yes	Yes
<div><div></div><div>17/09/2010</div></div>	Absence Letter	Unauthorised absence letter.pdf	Yes	Yes
<div><div></div><div>17/09/2010</div></div>	Contract	INDIVIDUAL EMPLOYEE AGREEMENT	Yes	Yes
<div><div></div><div>17/09/2010</div></div>	Certificate of Earnings	End Of Tax Year Earnings Certificat	Yes	Yes
<div><div></div><div>17/09/2010</div></div>	Policy Document	Health & Safety Policy.pdf		Yes
<div><div></div><div>17/09/2010</div></div>	Policy Document	Equal Opportunities Policy.pdf	Yes	Yes

Open the document by clicking on the relevant document link.



Click on the red PDF icon () on the left hand side to open the document.

Once documents have been opened, the Opened field changes to Yes.

You may delete documents by clicking on the red cross ().

My details

To view your personal payroll details, click on the **My details** tab page:

IMS Online - Sample Company Limited

Logged in as: HAMILTON, Jenny

My leave | My payslips | My documents | **My details** | My password

Logout

My details

Print | Notify | Refresh

HAMILTON, Jenny

First Names: Jenny

Preferred Name:

Address: PO Box 54
Best Town

Phone Number: 778 6665

Occupation: Process Supervisor

Tax Code: M

Pay Frequency: Weekly

Net Pay Payment Method: Bank

Bank Accounts: 21-0032-0005586-00

Bank Account Reference: Wages

Bank Account Particulars: Sample Co

Bank Account Code:

Leave

Surname: Hamilton

Employee Number: 1008

Gender: Female

Birth Date: 10/11/1952

Email Address:

Mobile Number:

Start Date: 10/09/2001

IRD Number: 018-683-717

Waged Hourly Rate: \$18.00

Print your details

Print your personal details by clicking the **Print** button. The following window will be displayed:

Print

* Format : PDF

* Orientation : Default

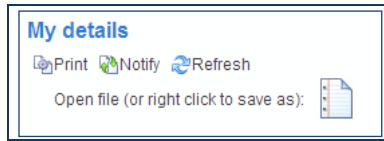
Email Address :

OK Cancel

Field	Explanation
Format	<ul style="list-style-type: none"> Choose from the following formats: <ul style="list-style-type: none"> PDF Excel Screen You would normally choose PDF or Screen for My Details.
Orientation	<ul style="list-style-type: none"> Leave as Default.
E-mail address	<ul style="list-style-type: none"> If you wish to e-mail a copy of the report to either yourself or someone else, enter a valid e-mail address into this field. The e-mail will be sent when you click OK.

Press **OK**.

Once the file has been created, a notepad icon will be displayed:



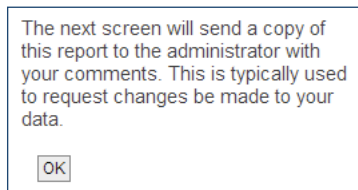
To open the file in a separate browser window, use your mouse and **left-click** on the notepad icon.

Alternatively, use your mouse and **right-click** to save the file on your local computer.

Notify changes to your details

You are able to generate an e-mail from IMS Online Express which will create a copy of your personal details to your Payroll department, as well as changes you wish to make to your details.

To notify Payroll of changes, click the **Notify** button. The following window will be displayed:



Press **OK**.

The Notification screen will then be displayed:

A screenshot of a web form titled "Notify Admin". It has a text input field for "Email Address" containing "payroll@ims.sales.co.nz". Below this is a larger text area for "* Comment :". At the bottom are "OK" and "Cancel" buttons.

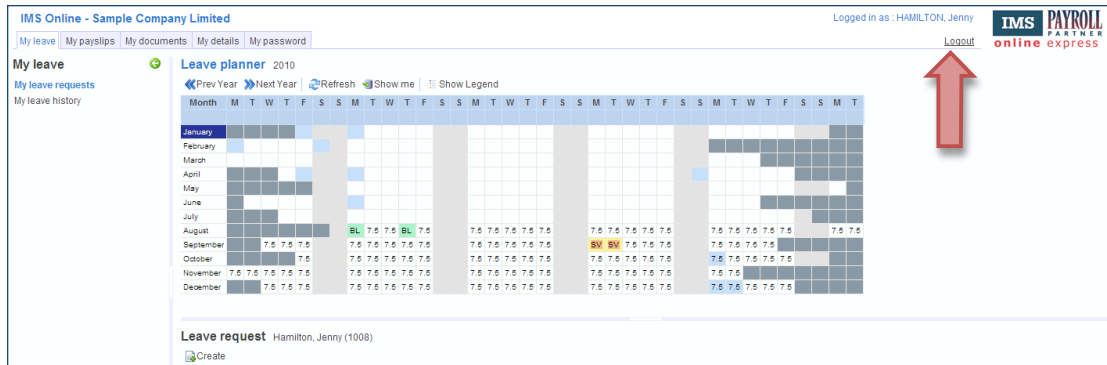
Type in your requested changes to your personal details in the Comments box. Ensure that full detail is provided so that your Payroll department is able to action the change.



The e-mail address will reflect the e-mail address of your Payroll department.

Logging out of IMS Online Express

Click on the Logout link on the top right hand side of the screen:



Do not click on the X in the top right corner of the screen.

It is important to use the **Logout** link to ensure you are logged out of the system properly.

© Copyright 2010 Enfinet Software Limited. All rights reserved.

No part of this information may be reproduced, translated or transmitted in any form or by any means, electronic or otherwise, or stored in a retrieval system of any nature without the express permission of the copyright holders.

This version replaces all previous versions of this information. Specifications are subject to change without prior notice.