

IMS PAYROLL

online express

IMS Online Express

**Manager
user guide**

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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*
 - *Enter Leave Requests on behalf of your employees*
 - *View past, current and future leave requests, for yourself, and for your team*
 - *Check the status of leave requests for yourself, and for your team (not approved, approved)*
 - *View scheduled days of work for yourself, and for your team*
 - *View actual leave history payments for yourself, and for your team*
- **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 cannot see all the pages on the My Leave tab as shown above, you are not set up in IMS Payroll as a Manager.

Please contact your Payroll department for further information.

Leave Requests

The following functionality is available for managers on the **Team's Leave Requests** tab page:

- A monthly calendar showing Leave Requests for the manager and their team
- Create Leave Requests on behalf of employees
- Apply for own leave online
- Check the status of Leave Requests (not approved, approved)
- Approve or decline employee Leave Requests
- View past, current and future Leave Requests
- View scheduled days of work

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

- An annual calendar showing Leave Requests for the manager only
- Apply for own 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 submit a Leave Request on behalf of an employee**
 - An e-mail will be sent to the employee advising them you have created a Leave Request on their behalf.
 - If you add a comment, this will be included in the e-mail text.
- **You approve an employee's Leave Request**
 - An e-mail will be sent to the employee advising them you have approved their Leave Request.
- **You decline an employee's Leave Request**
 - An e-mail will be sent to the employee advising them you have declined their 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 / Employee 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

Print Notify Refresh

CLARK, Andrea

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

Apply for leave

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



Your Leave Request may also be created from the Team's Leave Request tab page.

IMS Online - Sample Company Limited

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

My leave

- Team's leave requests
- My leave requests**
- Team's leave history
- My leave history
- Leave KPIs
- Leave liability (units)
- Absenteeism Trends

Leave planner 2010

Prev Year | Next Year | Refresh | Show me | Print | 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
January																						
February																						
March																						
April																						
May																						
June																						

The annual Leave Planner screen will display. 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

- Team's leave requests
- My leave requests**
- Team's leave history
- My leave history
- Leave KPIs
- Leave liability (units)
- Absenteeism Trends

Leave planner 2010

Prev Year | Next Year | Refresh | Show me | Print | 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
January																						
February																						
March																						
April																						
May																						
June																						
July																						
August																						
September																						
October																						
November																						
December																						

Leave request Clark, Andrea (1015)

Create

Leave balances

AL Outstanding	AL Accrued	AL Total	AL Next Due Date	Alt Holiday
9 Days	2.5 Days	11.5 Days	2/07/2011	8 Days

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.

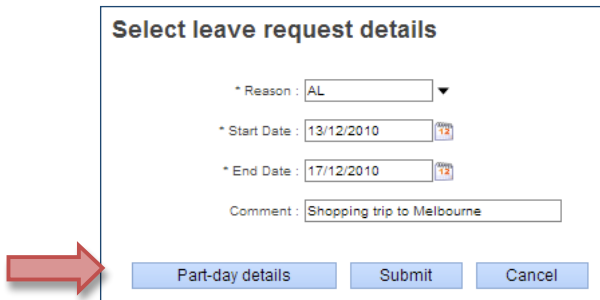


Leave Requests cannot be created once the payroll period for the date range has been processed.

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 :

Part-day details **Submit** **Cancel**

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)

Create Submit View Roster Delete

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
					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, Partial day flag not ticked	<ul style="list-style-type: none">• If today is a Partial Day, tick the Partial Day check box.• 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**:



Your Leave Request may also be withdrawn from the Team's Leave Request tab page.

IMS Online - Sample Company Limited Logged in as: CLARK, Andrea (as a Manager) [Logout](#)

[My leave](#) [My payslips](#) [My documents](#) [My details](#) [My password](#)

My leave

- Team's leave requests
- My leave requests**
- Team's leave history
- My leave history
- Leave KPIs
 - Leave liability (units)
 - Absenteeism Trends

Leave planner 2010

◀ Prev Year ▶ Next Year Refresh Show me Print 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	W	T	F	S	S	M	T
January																														
February																														
March																														
April																														
May																														
June																														
July																														
August																														
September																														
October																														
November																														
December																														

Leave request Clark, Andrea (1015) (Submitted - Starts on 13/12/2010 - Ends on 17/12/2010 - Shopping trip to Melbourne)

Create Withdraw View Roster

Leave balances

AL Outstanding	AL Accrued	AL Total	AL Next Due Date	Alt Holiday	
9 Days	2.5 Days	11.5 Days	2/07/2011	8 Days	13/12-17/12

Date	Request type	Partial day?	Hours	Notes	Roster
Mon 13/12	Annual leave	Yes	3		8
Tue 14/12	Annual leave				8

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 :

OK Cancel



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.

Approve an employee's Leave Request

To approve a Leave Request, click **Team's leave requests** on the **My leave** tab page, and then click on the **relevant Leave Request** for the employee:



Unapproved Leave Requests are colour-coded orange.

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 leave

Team's leave requests September 2010

My leave requests | My leave history | My leave history | Leave KPIs | Leave liability (units) | Absenteeism Trends

Leave requests September 2010

Prev Month | Next Month | Refresh | Show me | Print | Show Legend

Employee	W/1	T/2	F/3	S/4	S/5	M/6	T/7	W/8	T/9	F/10	S/11	M/12	T/13	W/14	T/15	F/16	S/17	S/18	M/19	T/20	W/21	T/22	F/23	S/24	S/25	M/26	T/27	W/28	T/29	F/30
1012 BLOXHAM, Peter	13.5	Days	8	8	8		AL	AL	AL	AL				8	8	8	8		8	8	8	8				8	8	8	8	
1015 CLARK, Andrea	11.5	Days	AL	8	8		8	8	8	8				8	8	8	8		8	8	8	8				8	8	8	8	
1018 RITCHIE, Susan	18	Days	8	8	8		AL	AL	AL	AL				8	8	8	8		8	8	8	8				8	8	8	8	

Leave request Ritchie, Susan (1018) (Submitted - Starts on 6/09/2010 - Ends on 10/09/2010)

Create | Approve | Decline | View Roster

Leave balance

AL Outstanding	AL Accrued	AL Total	AL Next Due Date	Alt Holiday
14 Days	4 Days	18 Days	2/05/2011	0 Days

6/9-10/9

Date	Request type	Partial day?	Hours	Notes	Roster
Mon 6/9	Annual leave				8
Tue 7/9	Annual leave				8
Wed 8/9	Annual leave				8
Thu 9/9	Annual leave				8
Fri 10/9	Annual leave				8
					40

Click the **Approve** button.

Leave requests September 2010

Prev Month | Next Month | Refresh | Show me | Print | Show Legend

Employee	W/1	T/2	F/3	S/4	S/5	M/6	T/7	W/8	T/9	F/10	S/11	S/12	M/13
1012 BLOXHAM, Peter	13.5	Days	8	8	8		AL	AL	AL	AL			8
1015 CLARK, Andrea	11.5	Days	AL	8	8		8	8	8	8			8
1018 RITCHIE, Susan	18	Days	8	8	8		AL	AL	AL	AL			8



The Leave Request changes to green to indicate it has been approved.

The employee will receive an e-mail notifying them that the Leave Request has been approved.

Decline an employee's Leave Request

To decline a Leave Request, click **Team's leave requests** on the **My leave** tab page, and then click on the **relevant Leave Request** for the employee:



Unapproved Leave Requests are colour-coded orange.

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 leave

Team's leave requests | My leave requests | Team's leave history | My leave history | Leave KPIs | Leave liability (units) | Absenteeism Trends

Leave requests September 2010

Employee: 1012 BLOCHAM, Peter | 1015 CLARK, Andrea | 1018 RITCHIE, Susan

Employee	W1	T/2	F3	S/4	S/5	M/6	T/7	W/8	T/9	F/10	S/11	M/12	T/13	W/14	T/15	F/16	S/17	M/18	T/19	W/20	T/21	F/22	S/23	M/24	T/25	W/26	T/27	F/28	S/29	M/30
1012 BLOCHAM, Peter	13.5	Days	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8
1015 CLARK, Andrea	11.5	Days	AL	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8
1018 RITCHIE, Susan	8	Days	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8	8

Leave request Ritchie, Susan (1018) (Submitted - Starts on 6/09/2010 - Ends on 10/09/2010)

Create | Approve | **Decline** | View Roster

Leave balances

AL Outstanding	AL Accrued	AL Total	AL Next Due Date	Alt Holiday
14 Days	4 Days	18 Days	2/05/2011	0 Days

6/9-10/9

Date	Request type	Partial day?	Hours	Notes	Roster
Mon 6/9	Annual leave				8
Tue 7/9	Annual leave				8
Wed 8/9	Annual leave				8
Thu 9/9	Annual leave				8
Fri 10/9	Annual leave				8
					40

Click the **Decline** button:

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

Decline leave request with comment?

* Comment: Sorry, too busy for you to take leave

OK

Cancel



You will not be able to decline the Leave Request unless a comment is added.

Your comment will be included in the e-mail sent to the employee advising them the Leave Request has been declined.

The Leave Request will no longer be visible to the Employee, Manager nor the Administrator.

Create a Leave Request on behalf of an employee

To create a Leave Request on behalf of an employee, click **Team's leave requests** on the **My leave** tab page, and then click on the relevant employee:

IMS Online - Sample Company Limited

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

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

My leave

- Team's leave requests
- My leave requests
- Team's leave history
- My leave history
- Leave KPIs
- Leave liability (units)
- Absenteeism Trends

Leave requests October 2010

Prev Month | Next Month | Refresh | Show me | Print | Show Legend

Employee	F/1	S/2	S/3	M/4	T/5	W/6	T/7	F/8	S/9	S/10	M/11	T/12	W/13	T/14	F/15	S/16	S/17	M/18	T/19	W/20	T/21	F/22	S/23	S/24	M/25	T/26	W/27	T/28	F/29	S/30	S/31
1012 BLOXHAM, Peter	13.5	Days	0		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
1015 CLARK, Andrea	11.5	Days	0		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
1018 RITCHIE, Susan	18	Days	0		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Leave request Bloxham, Peter (1012)

Create

Leave balances

AL Outstanding	AL Accrued	AL Total	AL Next Due Date	Alt Holiday
1 Day	12.5 Days	13.5 Days	31/12/2010	1 Day

Date	Request type	Partial day?	Hours	Notes	Roster
Mon 11/10			0		0

Click the **Create** button, and add a Leave Request in the usual manner.



Click Submit from the Leave Request details window, and then click Approve.

The employee will receive two e-mails; the first to advise them a Leave Request has been submitted on their behalf, and then a second to advise them that the Leave Request has been approved.

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, submit or approve the 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:

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	W
January																								
February																								
March																								
April																								
May																								
June																								
July																								
August																								
September																								

Hide Legend

- Approved
- Partially Approved
- No Roster
- No Date
- Not Approved
- Public Holiday
- Unsubmitted
- Warning
- Weekend

Click **Hide Legend** to remove it.

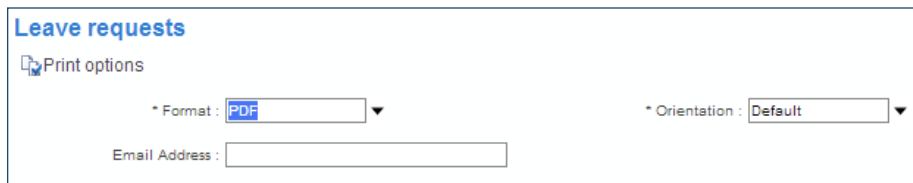
Navigation tips

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 (displayed on annual calendar screens)
Next Year	<ul style="list-style-type: none"> View leave data in the next year (displayed on annual calendar screens)
Prev Month	<ul style="list-style-type: none"> View leave data from the previous month (displayed on monthly calendar screens)
Next Month	<ul style="list-style-type: none"> View leave data in the next month (displayed on monthly calendar screens)
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 : ▼

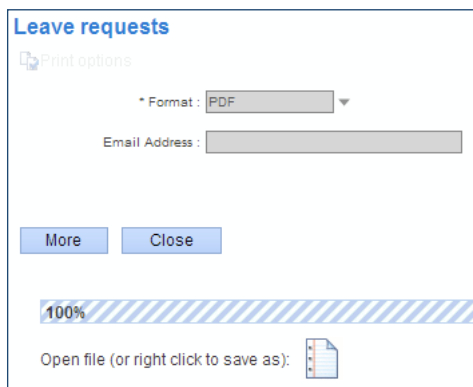
* Orientation : ▼

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

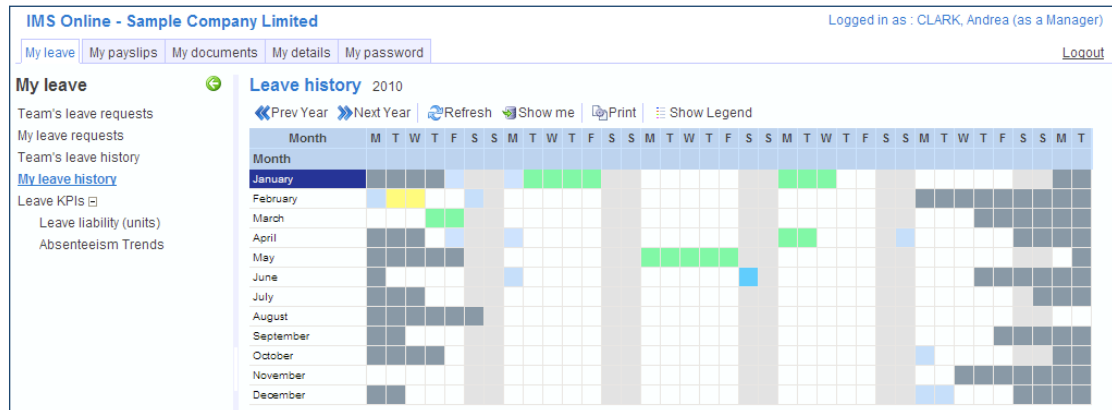
- Q: What are the numbers on the Leave Planner calendar?
- A: *These reflect the number of hours you are rostered for each day.*
- Q: I have applied for Annual Leave at Christmas, but I have now changed my mind and I'd like to come back to work a couple of days earlier.
- A: *You may withdraw the Leave 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



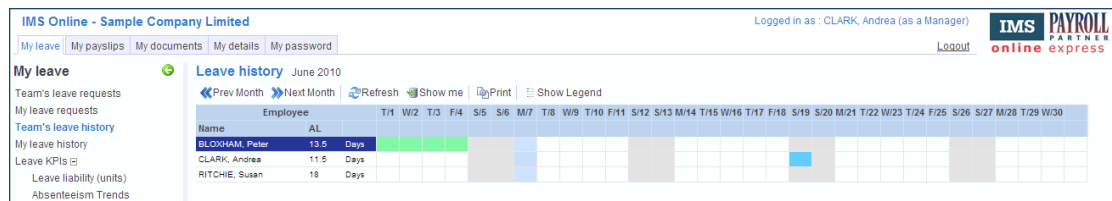
This screen shows Actual Leave that has been paid in IMS Payroll. This may differ from historical Leave Requests in IMS Online if leave has been entered directly into IMS Payroll.

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

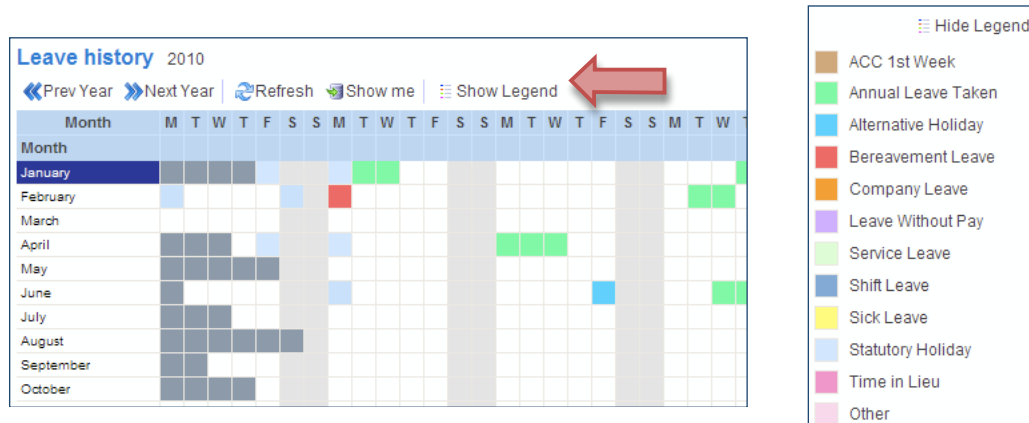


You may hover over a coloured cell to view the leave type and date.

To view your team's Actual Leave History, click **Team's leave history**:



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



Click **Hide Legend** to remove it.

Leave KPI reports

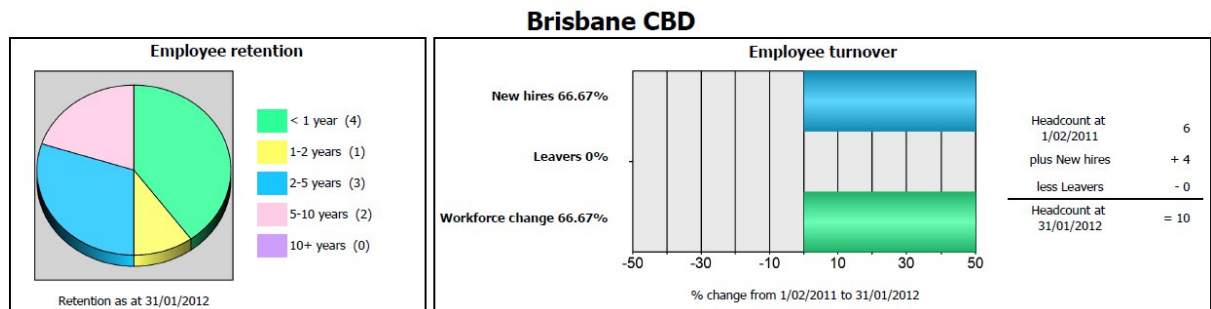


Managers are able to run Leave KPI reports to assist with effectively managing employee leave.

Employee turnover



See at a glance the change in Employee numbers, along with a breakdown of Employee Retention



This report shows how employee numbers changed over a set date range.

Report settings

Click the **Employee Turnover** report in the **Leave KPIs** folder on the **My Leave** tab page.

IMS Online

[My leave](#)
[My time](#)
[My roster](#)
[My payslips](#)
[My documents](#)
[Actions](#)
[Master files](#)
[Configuration](#)
[My password](#)

My leave

Team's leave requests

Team's leave history

Leave KPIs ☐

Absenteeism trends

Employee turnover

Excessive annual leave

Leave liability (units)

Employee turnover

Print options

* From :

* To :

Field	Explanation
From date	<ul style="list-style-type: none"> Use the calendar button to select a date for the first day of the reporting period. <p>Alternatively, simply type the date into the field (dd/mm/yyyy).</p>
To date	<ul style="list-style-type: none"> Use the calendar button to select a date for the last day of the reporting period. Alternatively, simply type the date into the field (dd/mm/yyyy).

Press **Start** to run the report.

Print report

Print the report by clicking the **Print** button:

Field	Explanation
Format	<ul style="list-style-type: none"> Choose from the following formats: <ul style="list-style-type: none"> PDF Excel Screen <p>You would normally choose PDF or Screen to output a report.</p>
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.

Excessive annual leave



See at a glance which employees you are responsible for have an excessive annual leave balance.

The Administrator sets a number of weeks for the “excessive” threshold.

Report output

Excessive annual leave					
Print Notify Refresh					
Emp no.	Name	Balance Units	Hours per week	Days per week	Estimated AL balance (weeks)
Work area: Factory					
1017	FLOWERS, Andrew	11.50 Days		5.00	2.30
Work area: Office					
1012	BLOXHAM, Peter	12.00 Days		5.00	2.40
1015	CLARK, Andrea	10.00 Days		5.00	2.00
1018	RITCHIE, Susan	16.50 Days		5.00	3.30

Employees who exceed the threshold for excessive Annual Leave will display on the report in red. With a simple graphical reporting, you can easily see who is also approaching a high annual leave balance.

Report settings

Click the **Excessive Annual Leave** report in the **Leave KPIs** folder on the **My Leave** tab page. The report will immediately load.

Print report

Print the report by clicking the **Print** button:

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 report.
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.

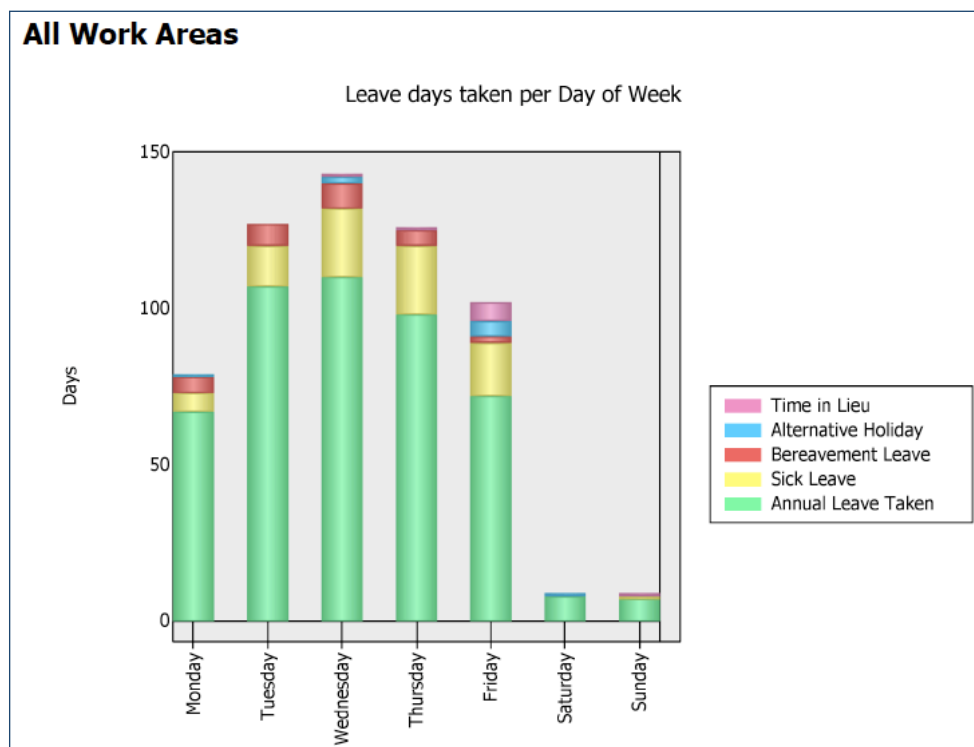
Absenteeism trends



See at a glance which days of the week are most commonly taken as leave days, as well as which leave types are popular on particular days of the week.

The report shows data for employees in Work Areas that you are responsible for, as well as for yourself (even if you are in a different Work Area).

Report output



The report will display all Work Areas first, and then show individual Work Areas as well.

Report settings

Click the **Absenteeism Trends** report in the **Leave KPIs** folder on the **My Leave** tab page:

IMS Online

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

My leave

- Team's leave requests
- My leave requests
- Team's leave history
- My leave history
- Leave KPIs
 - Employee turnover
 - Excessive annual leave
 - Absenteeism trends**
 - Leave liability (units)

Absenteeism trends

Print options

From Date : 01/10/2010 To Date : 31/10/2010 Include Statutory holidays? : ☐

Field	Explanation
From date	<ul style="list-style-type: none"> Use the calendar button to select a date for the first day of the reporting period. Alternatively, simply type the date into the field (dd/mm/yyyy).
To date	<ul style="list-style-type: none"> Use the calendar button to select a date for the last day of the reporting period. Alternatively, simply type the date into the field (dd/mm/yyyy).
Include Statutory Holidays	<ul style="list-style-type: none"> By default, Statutory Holidays are not included since they are not a true absenteeism payment type. However if you would like to include them in the report, then tick this field.

Press **Start** to run the report.

What you need to know

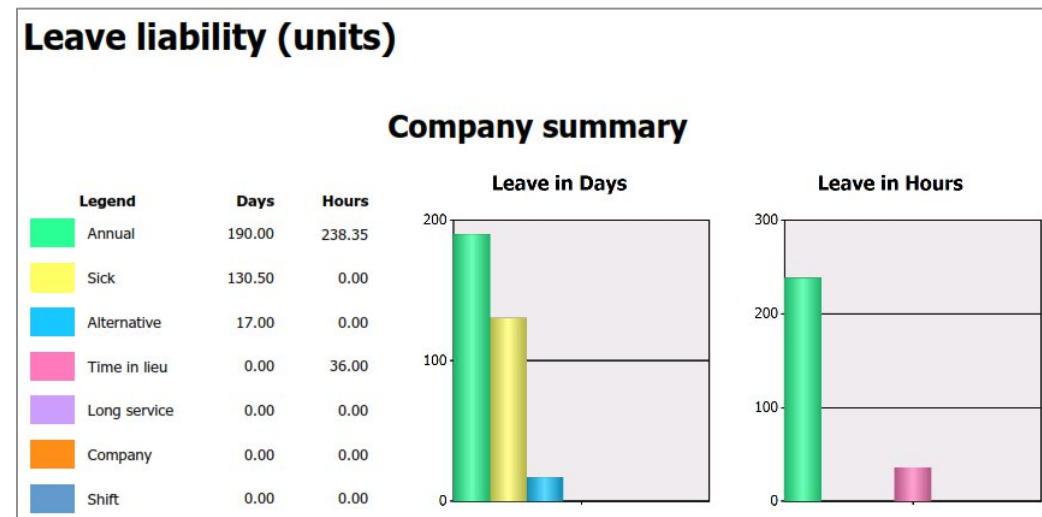
- One day is counted for each date within the date range of a particular leave payment. This means if an employee is on Sick Leave from Monday to Wednesday, then one unit is counted each day in the Monday to Wednesday columns.
- Similarly, if the employee takes Annual Leave over a two-week period (Monday until Friday the following week), then 12 units will be included over those 12 days. The report has no way of knowing what days are normal days of work for the employees.
- There is no differentiation between partial and full leave days. Whether the employee was on leave for one hour or eight hours on a particular day, one unit is counted for the day.
- If a day of week is not displayed as a column, this means no leave was taken on this day for your reporting period.
- For historical data (prior to using IMS Online Express), the data is only as good as what has been entered into IMS Payroll. This means that if leave has not been assigned to correct dates, then this report will also not be correct.

Leave liability (units)



See at a glance the outstanding leave balances displayed in days or hours depending on employee masterfile settings in IMS Payroll.

Report Output



This report shows the total liability for each leave type, split into days or hours depending on which leave unit each employee is set up as in IMS Payroll.

Report settings

Click the **Leave liability (units)** report in the **Leave KPIs** folder on the **My Leave** tab page. The report will immediately load.

Print report

Print the report by clicking the **Print** button:

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 report.
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.

My payslips


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



IMS Online - Sample Company Limited				
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.

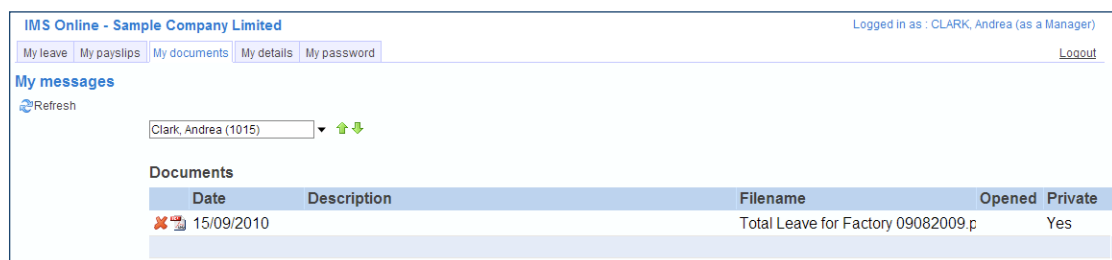


Note that you are only able to view your own payslips. You do not have access rights to view your team's payslips.

My documents

View own documents


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




IMS Online - Sample Company Limited				
My leave My payslips My documents My details My password				Logout
My messages				
Refresh				
Clark, Andrea (1015) [dropdown] [up/down arrows]				
Documents				
Date	Description	Filename	Opened	Private
15/09/2010	Total Leave for Factory 09082009.p		Yes	Yes

Open the document by clicking on the relevant document link.



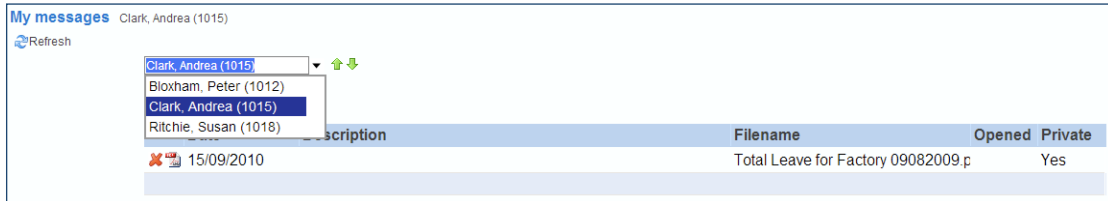
Click on the red PDF icon () on the left hand side to open the document.


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

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

View team's documents

Managers also have the ability to view their employee's documents. By default, your own documents will be displayed, however to view an employees, select the relevant employee from the dropdown list:



Description	Filename	Opened	Private
 15/09/2010	Total Leave for Factory 09082009.p	Yes	



Managers only have access to see their team's documents that are not marked as Private.

My details



Managers only have access to view their own details, and not the details of their team.

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

Print your details

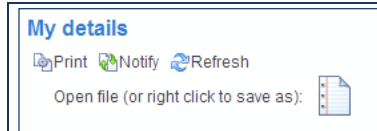
Print your personal details by clicking the **Print** button. The following window will be displayed:

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.
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Press **OK**.

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



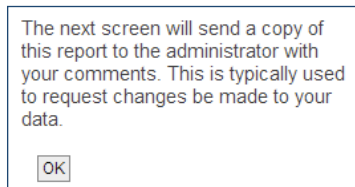
To open the file in a separate browser window, use your mouse and **left-click** on the notepad icon.

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.

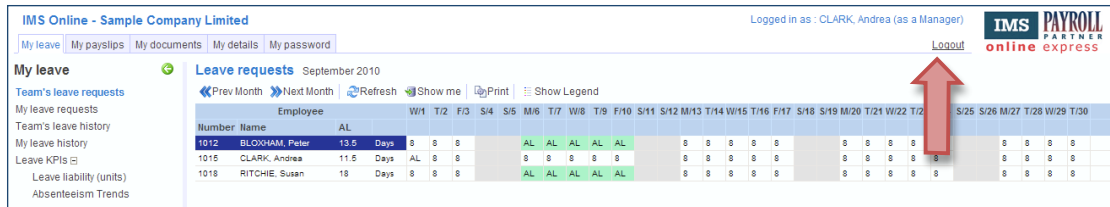
Type in your requested changes to your personal details in the Comments box. Ensure that full detail is provided so that your Payroll department is able to action the change.



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:



The screenshot shows the IMS Online Express interface for 'Sample Company Limited'. The user is logged in as 'CLARK, Andrea (as a Manager)'. The 'Logout' link is located in the top right corner, next to the IMS PAYROLL logo. A red arrow points to the 'Logout' link.



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.