

Integrated HR/Payroll System Project

MyView - User Guide

Setting Up Delegations in MyView

Document:	Setting Up Delegation Rules in MyView
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1 Setting Up Delegation Rules in MyView

Document Control

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1.2 Change History

VERSION	STATUS	DATE	AUTHOR	SUMMARY OF CHANGES
1.1	DRAFT	22/09/15	CIP Team MG	Draft

1.3 Document Approval

Document Issued By:

Name: CIP Team
Position: ResourceLink Consultant
Company: Highland Council

Document Approved By:

Name:
Position:
Company:
Date:
Version:

1.4 Introduction

As per the requirements document, Highland Council requires to manage the security accesses to HC employees within ResourceLink.

1.5 Purpose of Document

This document is to be used by Managers as a User Guide for this process in MyView Self Service

1.6 Assumptions

The following assumptions are made and are considered essential.

- The Operator has access to MyView.
- The Operator has been provided with login ID and password for ResourceLink login ID and password for ResourceLink

1.7 User Guide overview

- Logging into MyView
- Setting up Delegation Rules in MyView

1.8 MyView Navigation

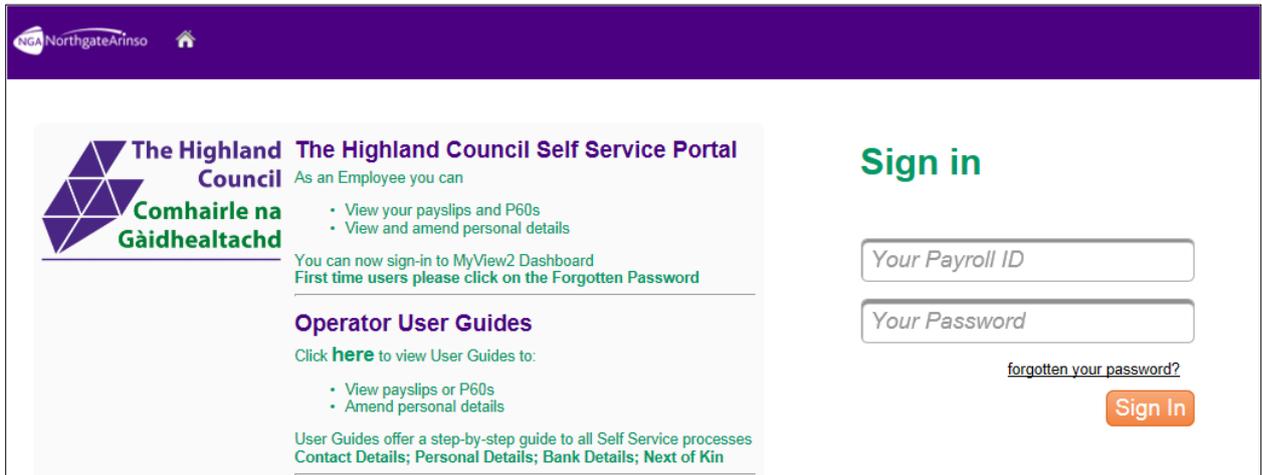
MyView navigation includes the following buttons:

[Back]	will take you back to the previous screen
[Close]	will close the current window
[home]	will take you back to the MyView homepage (Top right hand side)
[Print]	will print a copy of the relevant documentation
[Save]	will only save a draft of the item you are working on – this will not submit the information to the database.
[Submit]	will send your details/request to the system.
[View]	will take you through to another screen to view the relevant information

2 Logging into MyView

This first step is to show how you log into MyView

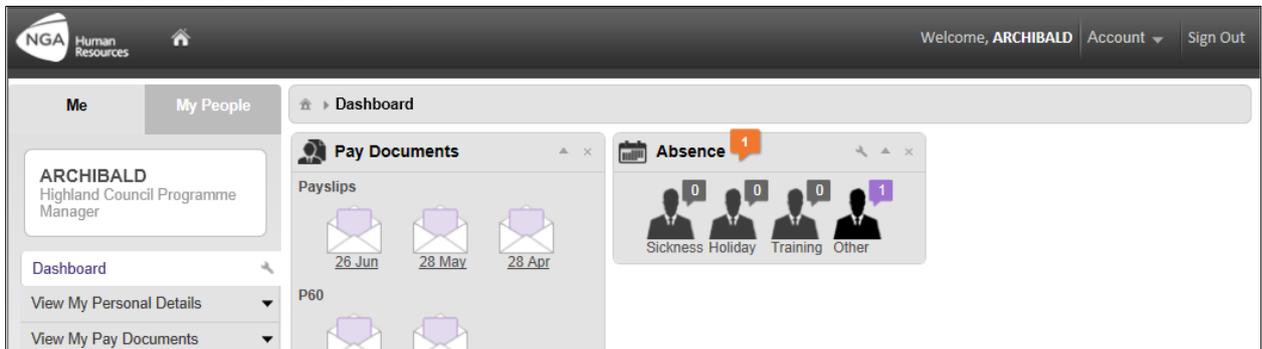
- 2.1 Open Internet Browser
- 2.2 Enter - <https://myview.highland.gov.uk/dashboard/>



The screenshot shows the login page for the Highland Council Self Service Portal. On the left, there is a logo for 'The Highland Council Comhairle na Gàidhealtachd' and a section titled 'The Highland Council Self Service Portal' with the subtext 'As an Employee you can'. Below this, there are bullet points: 'View your payslips and P60s' and 'View and amend personal details'. A note states 'You can now sign-in to MyView2 Dashboard' and 'First time users please click on the Forgotten Password'. There is a link for 'Operator User Guides' with a sub-note 'Click here to view User Guides to:' and another set of bullet points: 'View payslips or P60s' and 'Amend personal details'. At the bottom, it says 'User Guides offer a step-by-step guide to all Self Service processes Contact Details; Personal Details; Bank Details; Next of Kin'. On the right side, there is a 'Sign in' heading, two input fields labeled 'Your Payroll ID' and 'Your Password', a link for 'forgotten your password?', and a 'Sign In' button.

- 2.3 Enter Payroll Number
- 2.4 Enter Password
- 2.5 Click [Verify]

MyView – Dashboard will appear



The screenshot shows the MyView dashboard for a user named ARCHIBALD, Highland Council Programme Manager. The top navigation bar includes the NGA Human Resources logo, a home icon, and the text 'Welcome, ARCHIBALD Account Sign Out'. The main dashboard area is divided into several sections. On the left, there is a 'Me' section with the user's name and a 'My People' section. Below this, there are links for 'Dashboard', 'View My Personal Details', and 'View My Pay Documents'. The central part of the dashboard features a 'Pay Documents' section with 'Payslips' for 26 Jun, 28 May, and 28 Apr, and a 'P60' section. To the right, there is an 'Absence' section with a notification badge showing '1' and a bar chart for 'Sickness Holiday', 'Training', and 'Other'.

3 Delegation Rules

This module enables Managers to delegate responsibilities and authorisations to another individual. This is typically a member of their team, or their manager at the next level. A manager can only set up a Delegation Rule, an employee that is not a manager cannot set-up, edit or delete any existing Delegation Rule.

There are two types of delegation rules

- (1) **Authorisation** – gives a delegate access to authorise requests such as:
 - a. Expense Claims
 - b. Holiday request

- (2) **Responsibilities** – gives an employee access to enter requests such as:
 - a. Sickness Notification

3.1 Setting up Delegation Rules (Authorisation)

Expense Claims and Sickness Notifications cannot be delegated to anyone beneath the level of the Manager. It has to be delegated to another budget holder (Expenses) or to an employee who holds responsibility. It could be delegated to the level above the Manager.

Authorisations – are created because an employee will submit their own request

- From MyView Dashboard (Main Menu) click on [My Delegation Rules]

Drop down menu will appear



- Click on [My People Delegation Rules]

Delegation of Responsibility and Auth page will appear

Delegation of Responsibility And Auth

This module is used as part of the delegation rules set up. This allows a Manager to select a peer or reportee to be delegate to receive and approved notifications from staff such as Holiday requests, Web Expense Claims, Sickness Notifications and Incidents.

Delegation

- Click [Add New]

Delegation of Responsibility And Auth

This module is used as part of the delegation rules set up. This allows a Manager to select a peer or reportee to be delegate to receive and approved notifications from staff such as Holiday requests, Web Expense Claims, Sickness Notifications and Incidents.

New Rule

Rule Type * Authorisation Responsibilities

Description *

Delegate To *

Delegate For *

- At [Rule Type], ensure that [Authorisation] is selected – press tab key
- At [Description], type the description of the delegated rule so this can be identified by Manager – press tab key

New Rule

Rule Type * Authorisation Responsibilities

Description *

- At [Delegate To], click on [Search]

Screen will appear

Delegation of Responsibility And Auth

This module is used as part of the delegation rules set up. This allows a Manager to select a peer or reportee to be delegate to receive and approved notifications from staff such as Holiday requests, Web Expense Claims, Sickness Notifications and Incidents.

AdvancedSearch

Surname:

First Name:

Known As:

Previous Surname:

Employee Number:

Direct Reports Only:

Please enter criteria to retrieve matching employee data

- Enter details of delegated employee (example – Payroll ID) and click [Search]

Employee info will appear

Select:	Name:	Employee Number:	Location:
<input checked="" type="radio"/>	MACDONALD, MARY	32044201	HQ Corporate Development Service

Please make your selection from the search results to [Continue], or amend the search criteria and perform a new [Search]

- Click [Continue]

Screen will appear

New Rule

Rule Type * Authorisation Responsibilities

Description * Expenses Module Delegation - holiday cover

Delegate To * MARY MACDONALD

Delegate For *

Module/Process Group/View *

- At [Delegate For*], click on [Search]

Team list of Manager will appear

Delegation of Responsibility And Auth

Select Option People Individually Direct Reports Whole Team

Employee Name	Employee Number	Post	Employee Information
<input type="checkbox"/> ARCHIBALD MACPHERSON	32011540	Highland Council Programme Manager	
<input type="checkbox"/> THOMAS MACLENNAN	32065009	Commercial Manager	
<input type="checkbox"/> MICHAEL FULLERTON	32040242	Corporate Improvement Project Manager	
<input type="checkbox"/> DAVID MURRAY	32011721	HC Project Manager	

- Select the employees by individually selecting employees or clicking on Whole Team
- Click [Continue]

Screen will appear

Delegation of Responsibility And Auth

New Rule

Rule Type *	<input checked="" type="radio"/> Authorisation <input type="radio"/> Responsibilities
Description *	Expenses Module Delegation - holiday cover
Delegate To *	MARY MACDONALD <input type="button" value="Search"/>
Delegate For *	Whole Team of Highland Council Programme Manager <input type="button" value="Select"/>
Module/Process Group/View *	<input type="button" value="Select"/>

- At [Module/Process Group/View*], click on [Search]

Screen will appear

Delegation of Responsibility And Auth

Select the Modules and Process Groups that you wish to delegate.

- Delegated Responsibilities
- Delegation of Responsibility And Auth
- Document View
- Expense Claims
- Holiday Request
- Other Absence
- Peer Review Nominations
- Sickness Notifications
- Talent Succession Planning

- Select [Module]
- Click [Continue]

Screen will appear

New Rule

Rule Type * Authorisation Responsibilities

Description * Expenses Module Delegation - holiday cover

Delegate To * MARY MACDONALD

Delegate For * Whole Team of Highland Council Programme Manager

Module/Process Group/View * Expense Claims

- At [From Date], click on drop down calendar and select date when the delegation rule is to commence] – press tab key
- At [To Date], click on drop down calendar and select date when the delegation rule is to cease] – **this can be left without an end date** - press tab key
- At [Absence], **ensure that this is left blank** – press tab key
- At [Suppress Authorisation & Emails], ensure that box is ticked in order for emails to cease going to the original manager but instead going to the delegated employee
- Click [Submit]

Confirmation message will appear on screen

Dashboard > My People Delegation Rules

 **Confirmation Message**
Successfully created your delegation record

Delegation rule will show on screen

Delegation

Type	Delegated to	From	To	Absence	Description
A	MARY MACDONALD	01/09/2015		N	Expenses Module Delegation - holiday cover

Process END

3.2 Setting up Delegation Rules (Responsibilities)

Manager can delegate the responsibility of Holiday requests to an employee below their own level

Responsibilities – gives an employee access to enter requests such as:

- a. Sickness Notification

Responsibilities – are created because a Manager will submit information on behalf of the employee (example – notifying Payroll of Sickness / Other Absence)

- From MyView Dashboard (Main Menu) click on [My Delegation Rules]

Drop down menu will appear

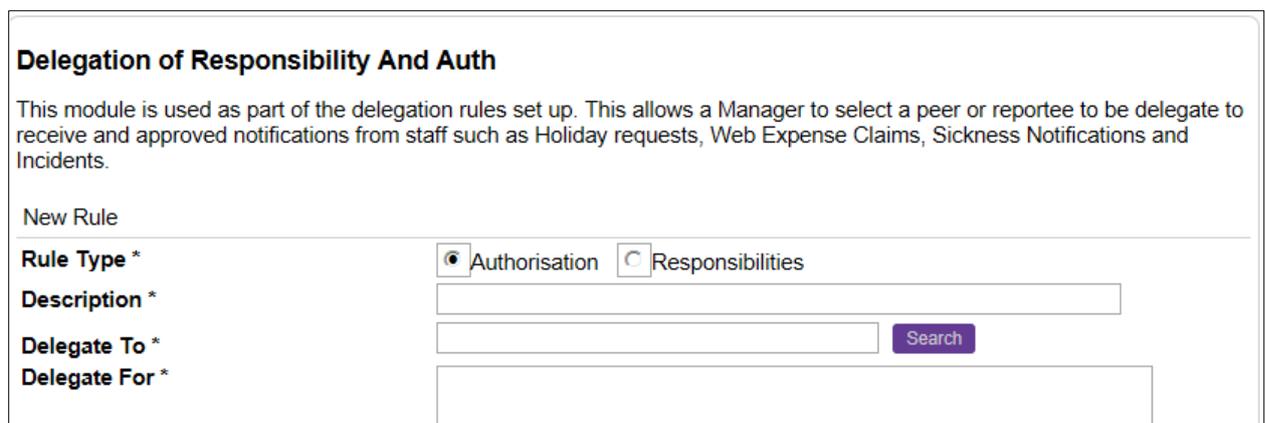


- Click on [My People Delegation Rules]

Delegation of Responsibility and Auth page will appear



- Click [Add New]



- At [Rule Type], ensure that [Responsibilities] is selected – press tab key
- At [Description], type the description of the delegated rule so this can be identified by Manager – press tab key

New Rule

Rule Type * Authorisation Responsibilities

Description *

- At [Delegate To], click on [Search]

Screen will appear

Delegation of Responsibility And Auth

This module is used as part of the delegation rules set up. This allows a Manager to select a peer or reportee to be delegate to receive and approved notifications from staff such as Holiday requests, Web Expense Claims, Sickness Notifications and Incidents.

AdvancedSearch

Surname:

First Name:

Known As:

Previous Surname:

Employee Number:

Direct Reports Only:

Please enter criteria to retrieve matching employee data

[Back](#)

- Enter details of delegated employee (example – Payroll ID) and click [Search]

Employee info will appear

Select:	Name:	Employee Number:	Location:
<input checked="" type="radio"/>	MACDONALD, MARY	32044201	HQ Corporate Development Service

Please make your selection from the search results to [Continue], or amend the search criteria and perform a new [Search]

[Back](#) [Search](#) [Continue](#)

- Click [Continue]

Screen will appear

New Rule

Rule Type * Authorisation Responsibilities

Description *

Delegate To * [Search](#)

Delegate For *

Module/Process Group/View * [Select](#)

- At [Delegate For*], click on [Search]

Team list of Manager will appear

Delegation of Responsibility And Auth

Select Option People Individually Direct Reports Whole Team

Employee Name	Employee Number	Post	Employee Information
<input type="checkbox"/> ARCHIBALD MACPHERSON	32011540	Highland Council Programme Manager	
<input type="checkbox"/> THOMAS MACLENNAN	32065009	Commercial Manager	
<input type="checkbox"/> MICHAEL FULLERTON	32040242	Corporate Improvement Project Manager	
<input type="checkbox"/> DAVID MURRAY	32011721	HC Project Manager	

- Select the employees by individually selecting employees or clicking on Whole Team
- Click [Continue]

Screen will appear

Delegation of Responsibility And Auth

New Rule

Rule Type * Authorisation Responsibilities

Description *

Delegate To *

Delegate For *

Module/Process Group/View *

- At [Module/Process Group/View*], click on [Search]

Screen will appear

Delegation of Responsibility And Auth

Select the Modules, Process Groups and Views that you wish to delegate.

<input type="checkbox"/> Document View:Web Expenses - Receipts	<input type="text" value="Save & Submit"/>
<input type="checkbox"/> Expense Claims	<input type="text" value="View Only"/>
<input type="checkbox"/> Holiday Request	<input type="text" value="View Only"/>
<input type="checkbox"/> Other Absence	<input type="text" value="View Only"/>
<input type="checkbox"/> Sickness Notifications	<input type="text" value="View Only"/>

- Select [Module]

Instruction panel will change to editable mode

Sickness Notifications View Only ▼

At [View Only], click on drop down menu and select [Save & Submit]

Sickness Notifications Save & Submit ▼

- Click [Continue]
- At [From Date], click on drop down calendar and select date when the delegation rule is to commence] – press tab key
- At [To Date], click on drop down calendar and select date when the delegation rule is to cease] – **this can be left without an end date** - press tab key
- At [Absence], **ensure that this is left blank** – press tab key
- At [Suppress Authorisation & Emails], the box is blanked out
- Click [Submit]

Confirmation message will appear on screen

Dashboard > My People Delegation Rules



Confirmation Message
Successfully created your delegation record

[Continue](#)

Delegation rule will show on screen

Delegation [Add New](#)

Type	Delegated to	From	To	Absence	Description
A	MARY MACDONALD	01/09/2015		N	Expenses Module Delegation - holiday cover
R	MARY MACDONALD	15/09/2015	30/09/2015	N	Sickness Notification - holiday cover

Process END

4 Logging Out

Please remember to log out from MyView when you have finished using it, please click on the sign out button at the top right hand of the screen.

5 Miscellaneous Error Messages

You may get an error message advising “STOP” “MyView : Session Ended – Your request cannot processed at this time”. Click on the [Return to home page] button on the bottom right hand side of the screen to log back into your MyView session.

Please report this error to: FSAT advising what task you were trying to perform during your MyView session.

At the moment **you will not be able to access the MyView Self Service outside of the HC network**

5.1 Alerts

Please be advised that the following message is only an Alert – we ask that you have some patience and try again later to amend your existing details

