MyView user guide

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MyView
MyView is a secure online employee and manager Self-Service portal that enables you to access and change your personal details, view payslips online and access the key details of the team that you manage.

Logging in
To access MyView please use the following link. You will need to use your RHUL Username and Password.

This will take you straight into the main MyView landing page
Navigation is by way of a Sidebar Menu on the left with shortcuts displayed on the dashboard.

If you experience any difficulties logging into your new staff account, please contact the IT Service Desk. For problems logging into MyView please contact selfservice-HR@rhul.ac.uk

Employee View (ME)
All employees will have an Employee View (ME) to enable access and changes to personal details such as address or emergency contact details, view payslips and submit timesheets.
Dashboard
Displays the home screen which includes quick links to frequently used items such as Payslips and P60's. Birthdays, In Progress actions and Authorisations
These can be hidden or deleted on screen and added back selectively by clicking on the spanner the on the Dashboard menu item.

My details

<table>
<thead>
<tr>
<th>Personal Details [You have 3 forms ]</th>
</tr>
</thead>
<tbody>
<tr>
<td>You are required to maintain your personal details via MyView, at all times. To view, amend or validate this information select from the details below.</td>
</tr>
<tr>
<td>GDPR</td>
</tr>
<tr>
<td>To comply with GDPR you will be asked to confirm and re-submit this information on a regular basis. Details about how your personal data is processed can be found in the Staff Data Collection Notice on the Staff Intranet.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>Form</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>20/02/2019</td>
<td>00000017128</td>
<td>My Details</td>
</tr>
<tr>
<td>09/01/2018</td>
<td>00000015080</td>
<td>Address &amp; Telephone Numbers</td>
</tr>
<tr>
<td>13/12/2015</td>
<td>00000012499</td>
<td>Bank/Building Society Details</td>
</tr>
</tbody>
</table>

To make changes to any of the information detailed, you need to click on **edit these details** and once completed, it is important to click on **submit**.

1. **Addresses & telephone numbers** - here you can view and amend the addresses and contact telephone numbers held for you on the staff system (all fields are amendable).
2. **Bank/building society details** - here you can view and amend the bank/building society details where you receive your monthly pay. If you update your details using MyView a confirmation email will be sent to you.

- To change your bank account number you must type your new bank account number in the first 'account number' field (overtype the **** and 4 digits displayed). Then, type your old bank account number in the confirmation account number field, as the system checks this number against the details currently stored for you.

- The bank account number must be 8 digits long. Some Lloyds accounts are only 7 digits, in which case you need to prefix the account number with a zero (0), however if your Lloyds account already has 8 digits, do not prefix it with a zero (0).

- Any changes made to your bank/building society details between 19th-27th of the month will not be effective until the following month's payroll - please ensure that your existing bank/building society account is not closed before the 27th of the month.

- Any changes made here will automatically be updated on the college's finance System (Agresso) for the purposes of paying expenses claims.

- When changing your bank/building society details please check them thoroughly before submitting them as it is your responsibility to ensure that these details are correct.

- If you do not have a UK bank/building society account please email selfservice-payroll@rhul.ac.uk

- Click on submit when you have finished.

3. **Emergency contacts details** - here you can view and amend the details of people we should contact in an emergency (all fields are amendable)

4. **Equalities data** - here you can view and amend you marital status, ethnic origin, nationality, sexual orientation, religion and belief and give details of any disabilities you may have

5. **My details - personal information** - here you can view your names, date of birth, gender and national insurance number (only 'known as' is amendable)
6. **Next of kin details** - information about who should be contacted in the event of death. This includes their surname, forename, address, postcode and telephone number.

**Pay documents**

This option will be replaced over the coming months by the new [My Pay](#) option which is easier to read and offers more information but will only hold pay details as far back as 1 April 2017.

Users are encouraged to download legacy pay documents while the [Pay Documents](#) option is still available.

**My pay**

This offers a user friendly interface for accessing annual pay documents and will replace the [pay documents] option.

My pay features include:

- Payslips by date
- Payments and deductions at a glance
- Ability to toggle between £ amounts or %’s
- Download in PDF format
- Annual documentation such as P60’s listed under document type for each year worked

**Timesheets**

Once you have logged into MyView you can access **my timesheets** from the side menu.

Select the correct post from the dropdown list at the bottom of the screen and click on form with description **create new claim**. If you are claiming for more than one role, you are required to complete a claim form for each role.
The timesheet will be displayed showing the job title of the post you selected. Completing the timesheet:

1. The description field automatically shows ‘new claim’. Overtype this with the week commencing date for the timesheet, Monday being the first day of the week (see below) and include your name.

2. Use the dropdown to select whether the amount is additional hours – paid at basic rate, overtime x 1.5 or overtime x 2.0. If you are hourly paid, the lines will be already present and you will not need to do this step.

3. Enter the date of when the hours were worked in the claim date field. You can either type the date in or pick it from the date picker click on the minus button if you accidently enter too claim dates for the working week.

4. Enter the number of hours worked in the amount/units field – this needs to be entered as a digital number e.g. For 5 hours 15 minutes enter 5.25, for 6 and three quarter hours enter 6.75.

5. The rate is picked up from the staff system and is therefore not shown on the timesheet, and as it is derived it will not be displayed under the rate column or in the total fields. Therefore the total and grand total fields will always show as 0.00.

6. To add further rows for claiming hours worked, click on the icon at the end of the last row.

Clicking reset deletes all the data you have entered and deletes the lines.
Clicking **save** just saves the timesheet onto your MyView, and can be accessed via the ‘open’ box of ‘my timesheets’. You can keep updating this timesheet until you have submitted it for authorisation (e.g. Update it daily, and then submit it at the end of the week).

7. Click **submit** to submit your timesheet to your line manager for authorisation
8. When you click on submit you will be asked to confirm your action. Click **ok**
9. You will receive a confirmation message; click on **continue**
10. Once you have submitted your timesheet an e-mail is automatically sent to your line manager informing them that they have a timesheet from yourself awaiting authorisation
11. Your submitted timesheet will now move to your **submitted** box on ‘my timesheets’

At this point you can choose to withdraw your timesheet if you wish to make changes (**you can only do this before it is authorised**)

To withdraw your timesheet click on the appropriate form number and then click on **Withdraw** at the bottom of the screen. You will be asked to confirm your action

If you wish to re-submit this timesheet click on the form number to enter the relevant timesheet then click on **re-open**

The open timesheet will now move to your ‘open’ box on **my timesheets**

Click on the form number of the timesheet you wish to amend
Make any changes you require and click on **submit** as above

**Authorisation/rejection of my timesheet**

Once you have submitted your timesheet for authorisation your manager will go into MyView and either:

A) Authorise your timesheet without making any amendments

B) make amendments to your timesheet and authorise your timesheet - a message will be displayed in the authorisation/rejection note’ box explaining any amendments (see below)
C) Reject your timesheet - a reason why will be given in the **authorisation/rejection note** box

Regardless of whether your timesheet has been authorised or rejected by your line manager you will receive an email to the email address registered with hr

**Timesheet authorised (with or without amendments)**

If you timesheet has been authorised you will receive the e-mail below to the e-mail address registered with HR advising you of this

It is advisable that you log back into MyView to check whether any amendments have been made - your authorised timesheet will now have moved to your **authorised** box on my **timesheets**

Click on the form number to enter the timesheet

Any comments your line manager has written will show in the **authorisation/ rejection notes** box

**Timesheet rejected**

If you timesheet has been rejected you will receive the e-mail to the e-mail address registered with HR advising you of this.

The timesheet can be accessed via the **rejected** box of my **timesheets**

If you want to amend and resubmit it, click on the form number

Click on **re-open** to make changes to the timesheet

A confirmation screen will appear
You then need to go to the open section of my timesheets and click on the form number again to amend as necessary and click on submit to submit it when you have made the necessary changes.

Any problems or queries you have with MyView should be reported to the HR systems Team using the e-mail address: selfservice-hr@rhul.ac.uk.

**Entering Delegation Rules (Manager Option)**

Before setting up a delegation rules, it is your responsibility to have a conversation with the person you are assigning the delegation to ensure that they are aware of the responsibility.

Assigning delegation for timesheet - can only work if the person assigning to is also a manager (has manager profile on MyView). If this needs to be modified please email selfservice-hr@rhul.ac.uk.

This module is used to give someone else within your team permission to authorise or reject timesheets on your behalf in your absence.

1. Click on the ‘delegation rules’ option in the menu to the left of the screen
2. Click on add new

Fields with a * are mandatory (rule type, description, delegate to, delegate for, module/process group)

1. **Authorisation** should already be selected, but click in the radio button if not
2. Enter a description in the description field e.g. Delegate timesheet authorisation while on holiday
3. Click on search at the end of the delegate to field
4. Enter data in the relevant fields in order to search for the person you want to delegate to e.g. Surname, click on search.
5. Select the appropriate person and click on continue if the right person has been found, or click on search again if not
6. Once selected, the person’s name will appear in the delegate to field
7. Click on select at the end of the delegate for field – this is to specify whose timesheets the delegate has permission to authorise / reject. A list of all staff who report to you will appear.

You can select people individually or by selecting direct reports only or selecting the whole team.

Clicking on select all will select everyone (including any staff who report in to people who directly report to you) or you can select people manually by clicking the tick box next to their name. To see lower levels of staff click on the + box.

*Please note that you cannot allow the delegate to authorise their own timesheets – you will need to deselect them before continuing*

8. When finished, click on continue.

9. If you selected people individually, their names will appear in the delegate for field. If you clicked for the whole team, it will say ‘whole team’ rather than listing all members of your team.

10. Click on select at the end of the module/process group field and then select ‘my timesheets’ and click on continue.
11. Enter a **from-date** and a **to-date** or select the dates from the date picker. (If no dates are entered the delegation of responsibility for authorising my timesheets will continue indefinitely.)

12. Ignore the **absence** field

13. To prevent authorisations being displayed in your MyView, and authorisation emails being sent to you for the duration of the delegation, click on **suppress authorisation & emails.**

14. Click on **submit**

15. You will receive a confirmation message saying that the delegation rules has been created – click on **continue**

16. A summary will then show in the **delegation of responsibility and auth** section

17. Click on the bold description text to see the details of the delegation rules

**Delegated responsibilities**

Once the rule has been set up, the member of staff who you have delegated the responsibility to will be able to see the delegation rules via the **delegation rules** module on MyView

1. When a timesheet claim is submitted in the time period covered by the delegation rules, an email will now be sent to the delegated authoriser and yourself

2. You can click through under **delegation rules** to find out more about the details of the rule and who you may be receiving authorisations for.
You do not need to do anything at the end of the delegation period. The rule will automatically cease.

**Entering HESA information (if applicable)**

1. **Click on HESA information** from the menu to the left of the screen

2. **Click on HESA information** under the 'processes' heading.

3. Check the information presented under HESA person details. It is possible to change nature of previous employment. If your previous employer was another higher educational institution (HEI) in the UK please also indicate which one using the previous higher education institute dropdown menu otherwise leave blank.

4. If there are any issues with the HESA staff identifier or HEP'S own staff identifier or date appointed at current HEI email selfservice-hr@rhul.ac.uk. **Click next**

5. Use the dropdown menu to enter **current academic discipline 1** your main academic area.

6. Use dropdown menus to enter **current academic discipline 2 and 3** as appropriate.
8. Use the dropdown menu to enter your highest qualification held. Click next.

9. 

10. Enter academic teaching qualifications as relevant.

11. Enter clinical excellence award as relevant.

12. Enter any regulatory bodies as relevant.

13. Click next.

14. Click submit.

15. Click ok to confirm that you want the amendments to be updated on your employee file. You will receive a confirmation message.
There will also be a new section called authorised in the HESA information menu and your employee record will be updated accordingly.

**My history**

Click on **my history** on the left hand menu

In this area it is possible to see when your details have been changed as well as any timesheets that have been submitted and their status (open, authorised or rejected). The actions taken are listed in date order which is, by default, listed by the most recent first. It is possible to search by keyword or filter by type of 'event' e.g. For overtime claims this would be an 'irregular claim'.

**Signing out of MyView**

You must sign out of MyView by clicking on **sign out** especially if you are not using your own private pc as other people may be able to view and amend your details if you fail to sign out.

Any problems or queries you have with MyView should be reported to the HR systems team using the email address: [selfservice-hr@rhul.ac.uk](mailto:selfservice-hr@rhul.ac.uk)

**Manager View (MY PEOPLE)**

If you are a Manager, you will also have a **Manager View (MYPEOPLE)** Tab providing access to the details of your team.
You are able to:

- View your team i.e. Any employee who reports into you, directly or indirectly e.g. Via a line manager team
- View employee timesheets that have been authorised for your employees or ones awaiting authorisation
- Record performance development review as having taken place.
- View manager reports

**Team selector**

Here you can view employees who report into you (and the employees who report into them by clicking the show reports). It is possible to search by first, last name or both and also to filter against last name. Clicking the + button next to their name grants access to the ‘authorisations’ and ‘employee claims’ menus.

**Performance development review**

**NOTE:** This option is only available when a team member is NOT selected.

If a team member is already selected using team selector as above they need to be deselected by clicking the red minus button or ‘deselect all’.

1. Click on *performance development review* on the menu to the left of the screen
2. Select the employee you want to record the performance development review for by clicking on the radio button next to their name. Click + to expand to see employees who report into them, if applicable. You can also search for a particular employee, if desired.
3. Enter PDR year, PDR meeting date, PDR status as completed and reviewer name if the PDR has been completed. If the employee does not require a PDR, enter the reason under PDR not required and enter the PDR status as not complete. Click **submit** when finished.

Manager RRS reports
1. To access the my people module log in as shown above and then click on the **my people** tab
2. Click on the **manager RRS reports** section of the menu presented to the left of the screen. This will open a New Browser Tab.
3. Click **view** and then click **repository**

4. You will then be able to select from a number of pre-configured reports. Click on one to run the report.
5. Available Reports (Initial)

The following reports are available

- Managers **Establishment Report** which contains significant Position and Post details.
- Employee **Probation List** which contains probation end-dates.
- **Sickness** Between two dates. This report is blank and requires the input of start and end dates to generate the report.

6. Reports are based on live data in the cloud and can be **downloaded** and saved on a local drive in a number of popular formats.
Authorisations of timesheets

NOTE: Only available when a team member is selected

You will receive an email notifying you that a member of your team has submitted a timesheet for authorisation

1. Follow the process under **team selector** to select a team member. The **authorisations** menu will appear.

2. Click **authorisations** on the menu to the left of the screen.

   From this screen you will be able to see all pending authorisations as well as the total number of requests for this month.

   You are unable to use the tick and cross buttons to the right of the screen to approve the timesheet request. If you attempt to do so you may be receive an error and be signed out of MyView.

3. Instead, click on the title of the timesheet under the **description** heading.

   The submitted timesheet will open, showing the date and hours worked as entered by the employee.

   If you agree with the dates and hours submitted, click on **authorise**
If you don’t agree with the hours or dates that have been submitted you can either:

- Amend the hours for the employee and write notes in the ‘authorisation/rejection notes’ box for the employee to view, and then click on **authorise**.
- Write notes in the ‘authorisation/rejection notes’ box as to why you are rejecting the claim and then click on **reject**.

Regardless of whether you authorise or reject a timesheet claim, an email will be sent to the individual informing them that their timesheet has been authorised or rejected.

Once you have authorised a timesheet it is no longer shown in the authorisations module. However, you are able to view all timesheets that your team members have created and had authorised as shown below.

**Claim history**

NOTE: This option is only available when a team member is selected.

You can access the **employee claims history** menu which shows claims created by your members of staff by clicking on **My people** Tab and selecting the employee using **Team selector**.

1. Click the down arrow under **employee claims**
2. Then click on **claim history**.
3. The timesheet forms will be displayed within the appropriate boxes e.g. Open, submitted, authorised, and rejected

4. **Click on the bold form number to see the actual timesheet**

5. **Click on back** to return to the manager summary page

**Employee emergency contact details**

1. Follow the process under **team selector** to select a team member. details
2. Click **my team contact** on the menu to the left of the screen.

3. Click **emergency contact details** and you will be shown your employees Personal Details. Do **NOT** record these off of the system as they are personal data.