LONDON METROPOLITAN UNIVERSITY

Employee self-service guide

Issue no	Date	Amended by	Change
1.0	01/10/13	Lydia Fernandes	First Draft
1.1	28/10/13	Robert Fisher	Tracked Changes and corrections plus one comment
1.2	31/10/2013	Lydia Fernandes	Added a few missing parts
1.3	05/11/2013	Lydia Fernandes	Adding all changes to the master copy.
1.4	23/06/2016	Sally Batty	Updated screenshots and links following upgrade of the London Metropolitan University Staff Zone website.
1.5	13/07/17	Lindsay Nicolson	Updated screenshots, logos and links inline with Staff Zone and University brand and edited text.

Contents

1. Login to self-service

1.1 What browser does self-service work in?

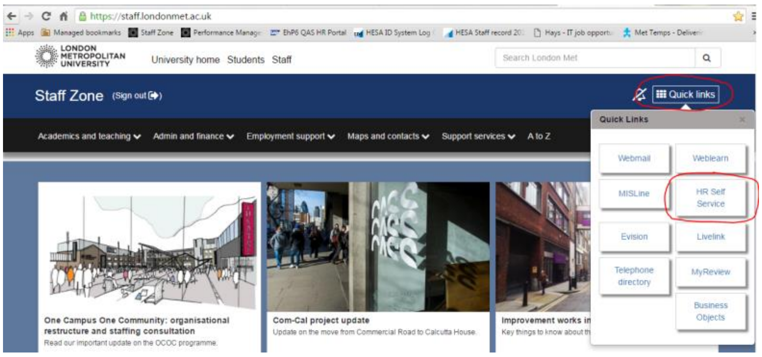
The recommended browser for ‘self-service’ is ‘Chrome’; however, it may also work in the following browsers:

- Internet Explorer
- Firefox
- Safari

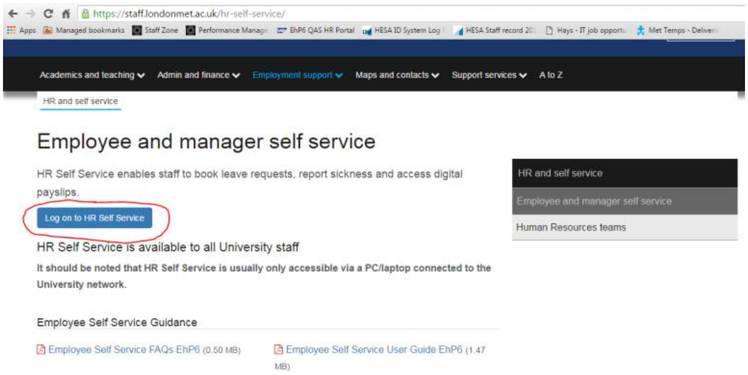
Contact the ICT Service Desk for web browser support. (ictservicedesk@londonmet.ac.uk)

1.2 How to log into self-service?

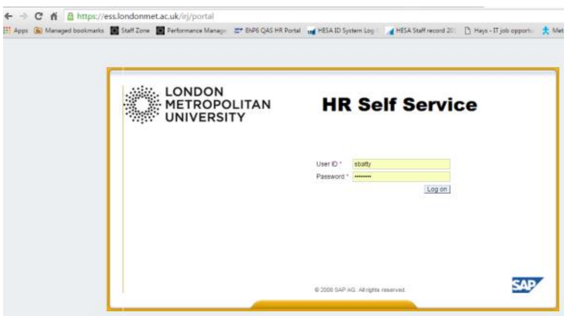
You can access the HR self-service system via ‘Quick links’ on the Staff Zone.



Quick links will open the screen below. Click on ‘Log on to HR self-service’:



The secure login screen will appear and you will need to login using your University network username and password.

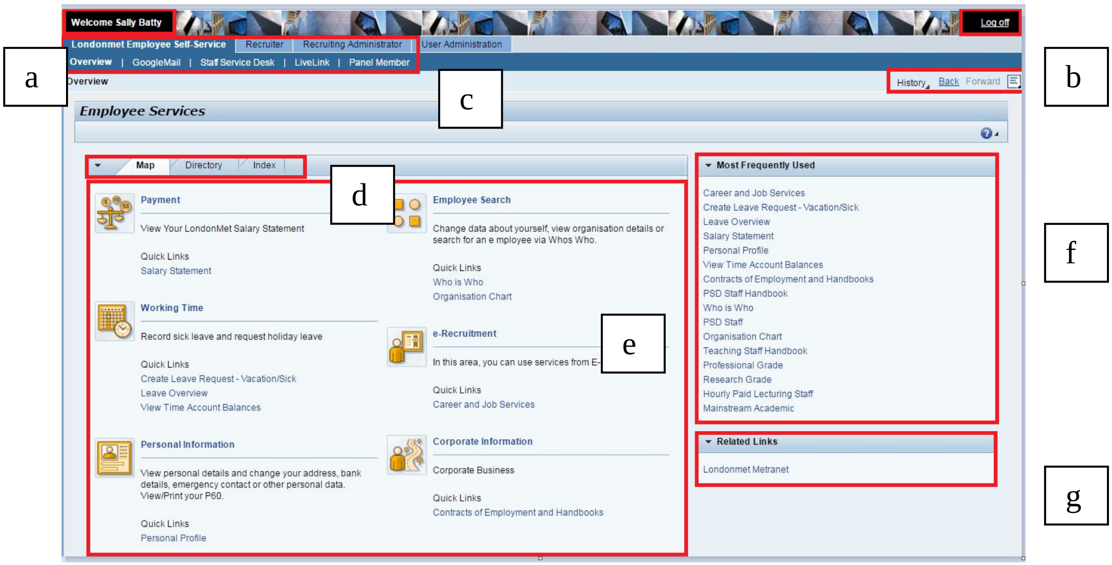


Once you are logged in, you will see the 'Workbench' screen, which is the main overview page for self-service.

2. Workbench – Employee

2.1 Workbench view

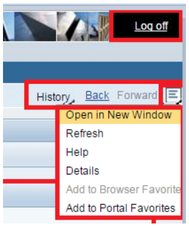
This is the 'employee' view that everyone will see. Line managers will see an additional tab in this view called 'Manager self-service', which will show all the manager functions.



a. The self-service system will display your name at the top left hand side, welcoming you to the system.

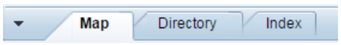
The top row of tabs gives you access to the different self-service functions. The bottom row gives you the option to link to your overview, googlemail, staff service desk or LiveLink.

b. Navigation tools:



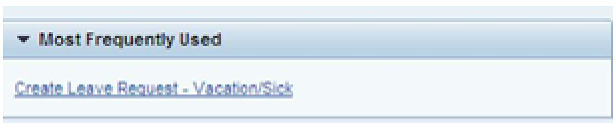
Icon / word	Meaning
Log off	This is log out of the system
History	This will show you all the navigation history of where you have been in one session.
Back	Here is where you can go back a page.
Forward	Here is where you can go forward a page
Refresh	This will refresh you screen.
Help	This can give you help on the system.

c. The tabs below allow for different display format options for your main menu.



e. The overview or main menu gives you access to all the areas that are available in self-service.

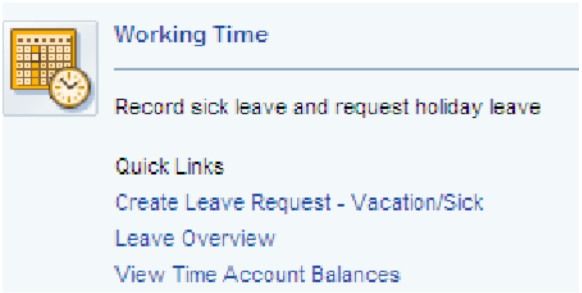
f. The Most Frequently Used tab will display your most frequently used items.



3. Working time

This section enables you to request annual leave and report sickness absences.

The ‘Working Time’ section has a list of quick links.



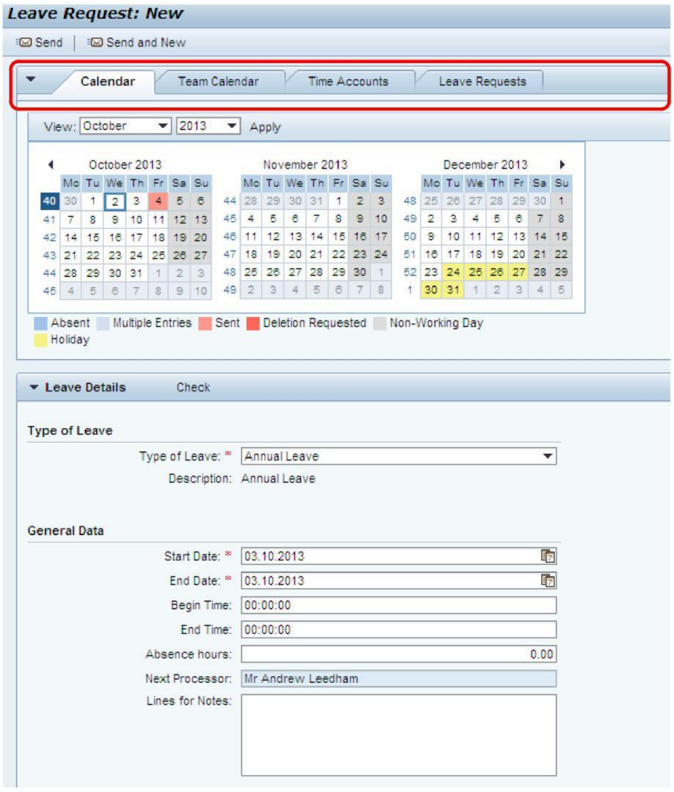
‘Create Leave Request’: for booking either holiday or sickness absence.

‘Leave Overview’: gives a summary of annual leave bookings and sickness absences.

‘View Time Account Balances’: displays a summary of annual leave taken and outstanding

3.1 Leave request screen

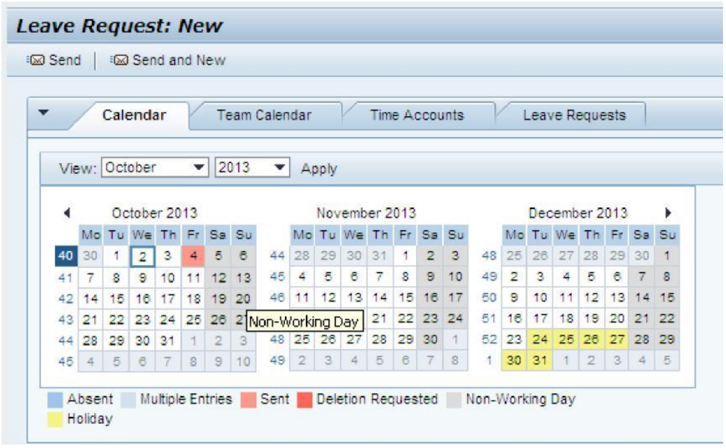
Selecting the link ‘Create Leave Request – Vacation/Sick’ will display the screen below. You can access four different types of data via the four tabs.



3.1.1 Calendar tab

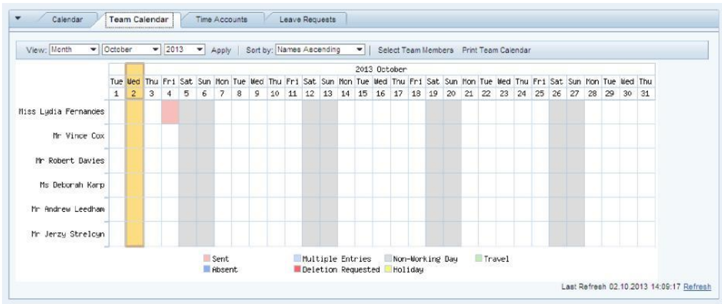
The default view is the 'Calendar' tab, which displays a three month calendar.

The calendar provides a summary of all your leave requests. Click the arrow key next to the first or last month on the display to scroll backwards or forwards through the months.



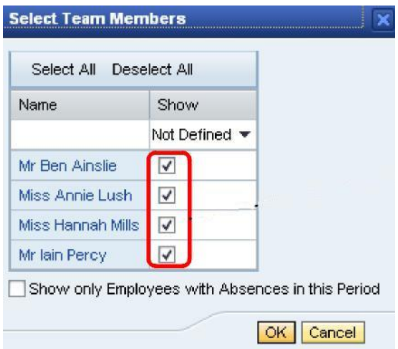
3.1.2 Team calendar

The 'Team Calendar' tab displays the requests and approved leave made by you and other colleagues in your immediate team and will inform you whether your leave requests clash with colleagues' requests.



3.1.2.1 Select team members

Within the 'Team Calendar' tab you have the option to select which members of your team you wish to see on your team calendar.

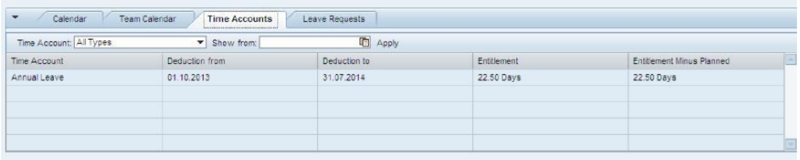


3.1.2.2 Print team calendar

You can print off your Team Calendar by clicking on the Print Team Calendar Tab.

3.1.3 Time accounts

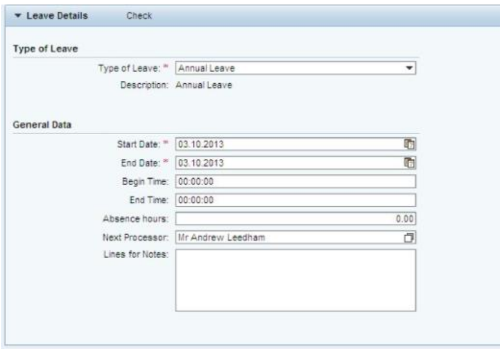
The ‘Time Accounts’ tab is where you can view how much annual leave you have. It will also display any “Carried Over Leave” from the previous year.



3.1.4 Leave requests

The ‘Leave Requests’ tab displays all the leave you have requested, and whether they have been approved, rejected or deleted.

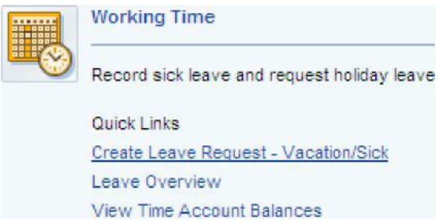
3.1.5 Leave details



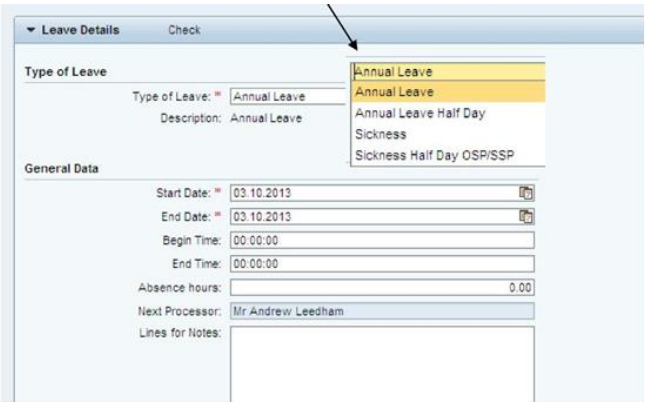
Below the calendar window, you will find the leave details section. This section is where you can enter leave requests or record sickness absences.

3.2 Creating leave requests

In the ‘Workbench’ select ‘Working Time’ then select ‘Create Leave Request – Vacation/Sick’ as shown below.



The ‘Type of Leave’ dropdown box gives you four options of types of leave you can request.

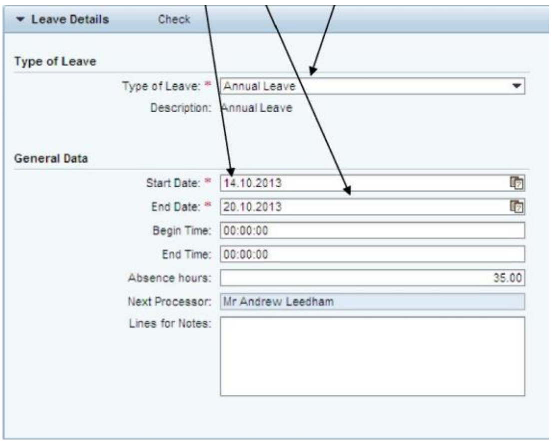


Note: Sickness absence of less than half a day does not need to be recorded on the system. Staff still need to follow normal procedures for reporting absences locally to line managers.

3.2.1 Annual leave request

To request annual leave, you will need to select ‘Annual Leave’ from the field ‘Type of Leave’ and then select the start and end date.

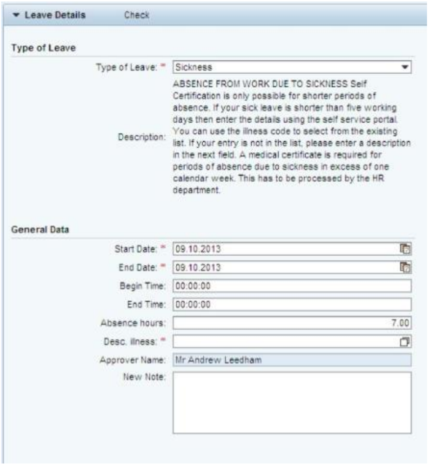
Note: You are able to select the start date from the calendar, but will need to enter the end date manually. You can also use the menu icons at the right hand end of each date box. There is an option to enter a note to your manager if required.



3.2.2 Sickness request

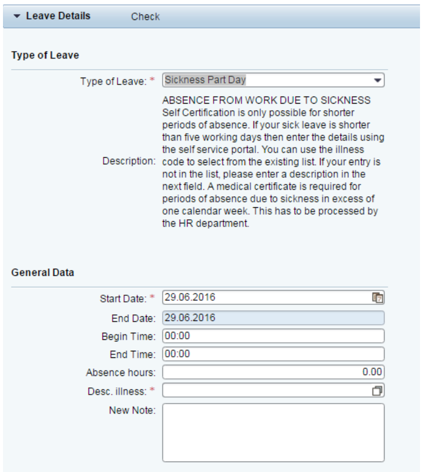
When you are reporting a sickness absence, you have the choice of reporting either a half-day or a longer period from the ‘Type of Leave’ as shown below.

Note: Sickness absence can only be entered on the portal if the absence is less than seven calendar days (five working days). If it is for a longer period then you will need to submit a sickness absence notification form and a medical certificate to Human Resources, who will then enter your sickness absence on the system.

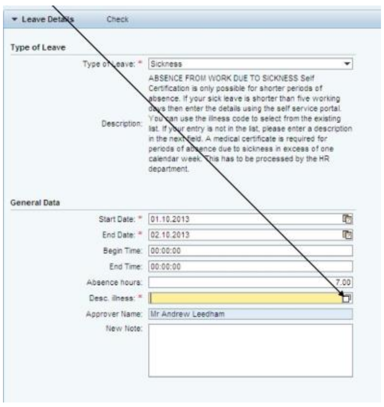


3.2.3 Half day sickness

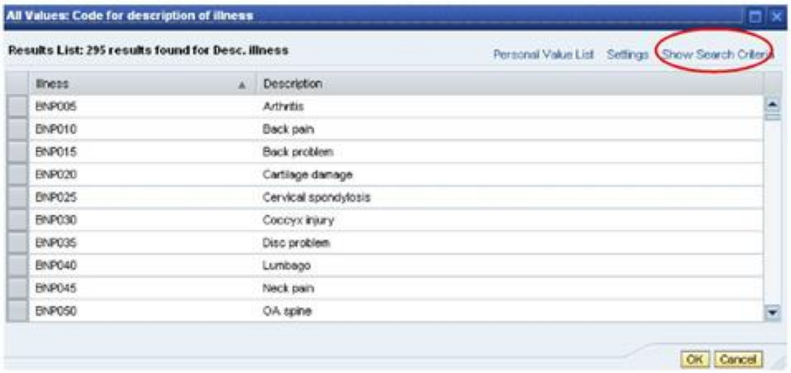
When you book a half-day sickness, you will notice that you are only able to enter the start date; however, you will need to enter the time to indicate whether you were off in the morning or the afternoon.



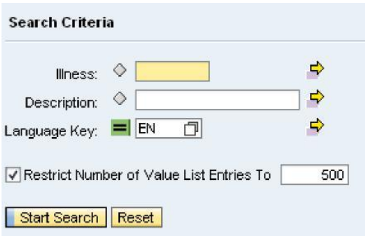
For all sickness absence recording you will need to fill in the ‘Desc. illness’ field.



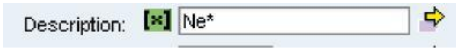
Click on the icon at the end of the ‘Desc. illness’ field for a dropdown of over 290 illnesses to report the nature of your illness.



In order to narrow down your selection you can do a search by entering your illness into the description field in the ‘Show Search Criteria’ tab, located in the top right hand corner of the illness list.

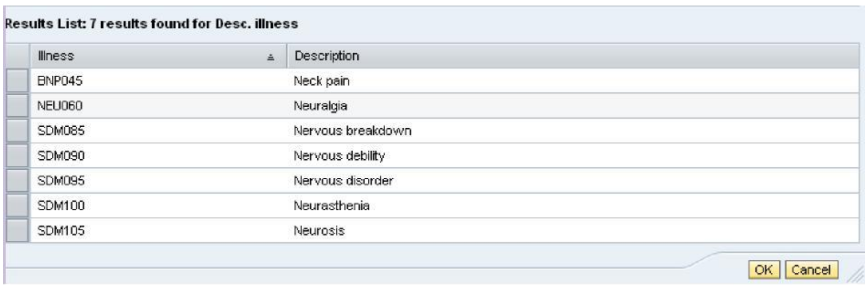


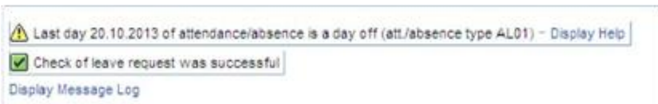
Tip: You can type part of the illness in and then use the wild card (*).



Enter in the illness or part of the illness followed by the wildcard, and then click on search. This will give you a list of all the illnesses matching your search criteria.

Select your illness and then press the ‘OK’ button to continue with your leave request.

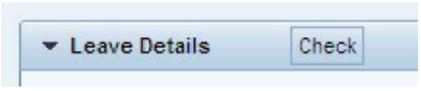




Note: Selecting the illness will automatically populate the ‘Desc. Illness’ field with the ‘Description Code’ and return you to the ‘Leave Details’ screen.

3.2.4 Checking leave

Once you have entered in the details of your ‘Leave Request’, click on the ‘Check’ button which is located next to the ‘Leave Details’ heading.



This function allows you to check if your leave clashes with any other leave requested by colleagues.

Note: You will not be notified if you have requested leave at the same time as another team member but you can review this in the team calendar (see 3.1.2).

Note: An error message will appear if there is a conflict between the request you are making and any historical booking in the system.

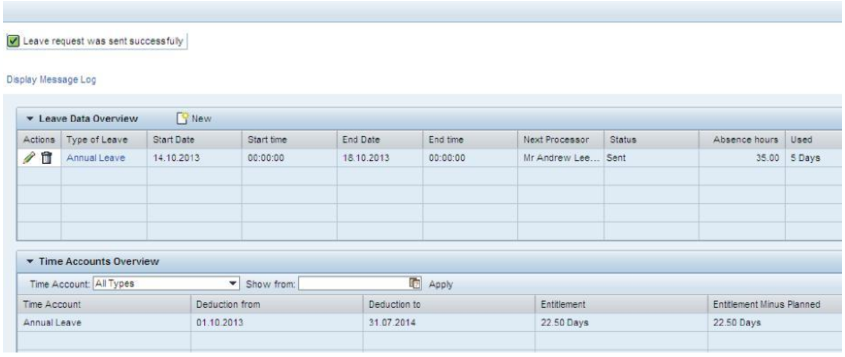
A ‘hazard warning’ message will display if there is an error in your input, similar to the example message below, which indicates that the last day of your leave is a non-working day.

Once you are happy with your submission, click on the ‘Send’ button or ‘Send and New’ that is located under the heading ‘Leave request’.

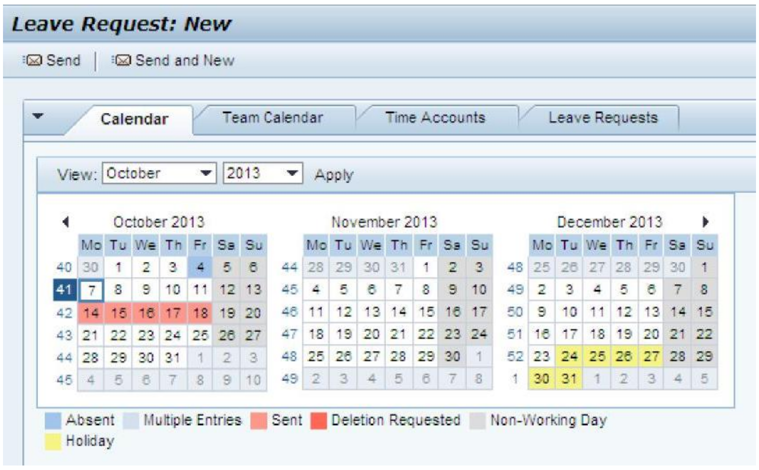
When you have clicked on the send button, a summary of your leave request is displayed which allows you to re-check the details.

If the details are correct, click the ‘OK’ button

The 'Leave Overview' screen will indicate that your request was sent successfully and will display your 'Time Accounts Overview'.



Your leave request will initially be displayed in red until your manager approves it. Approved leave is displayed in blue.



Note: The system approves sickness absence requests automatically and sends your manager an email notification of your absence.

Summary of creating a leave request

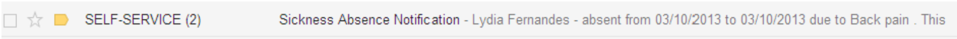
Steps	Actions
1	Select working time from the main menu.
2	Click on the ‘create leave request – vacation/sick’.
3	Select what type of leave you want from the drop down list.
Annual leave request	
	Select the start and end date for your leave. Note: You can select your start date from the calendar, but will have to enter in you end date manually.
Annual leave half day request	
	Enter in the start and end time. Note: This is so that the system can know if it is half day in the morning or afternoon.
Sickness leave request	
	Select the start and end date for your leave. Note: You can select your start date by using the calendar, but will have to enter in you end date manually.
3.1 (c)	Click the icon at the end of Desc. illness. Note: this is to bring up the full list of illnesses.
3.2 (c)	If you don’t know the code of your illness you will have type in your illness into the description field under the ‘Show Search Criteria’ and then click the ‘Start search’
3.3 (c)	Click on your illness from your search.
Sickness leave half day request	
	Enter in the start and end time. Note: This is so that the system can know if it is half day in the morning or afternoon.
3.1 (d)	Click the icon at the end of Desc. illness. Note: this is to bring up the full list of illnesses.
3.2 (d)	If you don’t know the code of your illness you will have type in your illness into the description field under the ‘Show Search Criteria’ and then click the ‘Start search’
3.3 (d)	Click on your illness from your search.
Checking leave request	
4	Press the ‘Check’ button you see if you are ok to proceed with your leave.
5	Click on ‘Send’ button (To make your request and send it to the your manager)
6	Press the ‘Ok’ button to process leave request.

3.3 What happens to your leave request?

Depending on what type of leave you requested, your request will show on the team calendar either as red (sent) or blue (approved).

Your line manager will receive notification of your request via email as per the example below:

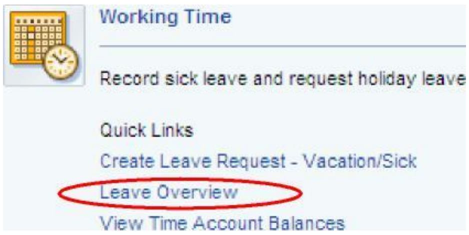
In the case of sickness absence, the email to your line manager will indicate the length and type of illness. The employee will receive the same email.



3.4 Amend/delete leave requests

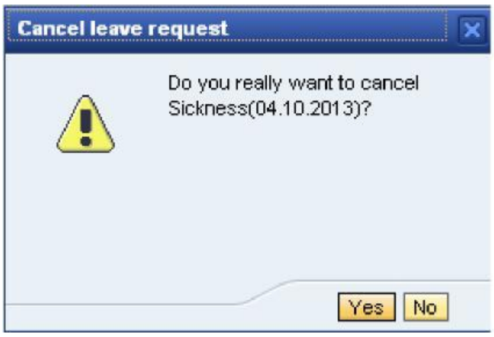
In order to amend or delete your leave request, go to the 'Working Time' area and click on 'Leave Overview'.

All your 'Leave Requests' and your 'Time Accounts Overview' will be displayed

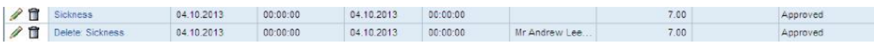


3.4.1 Deleting leave requests

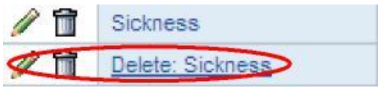
Select the leave request you wish to delete and then click on the delete icon next to your leave in the 'actions' column. A message will display prompting you to check if this is the leave request you want to delete:



If you press 'Yes' then in the leave overview it will show the following:



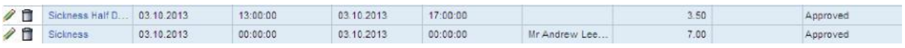
A new request is displayed but this time the word ‘delete’ is put in front of your original leave request as shown below.



3.4.2 Amending leave requests

Select the pencil icon alongside the leave request you want to edit.

This will redirect you back to your leave details, where you will be able to edit the original leave. You will be able to change the type of leave, dates and times. You will need to follow the same procedure you did before to request leave.



As you can see from the above, your edit is displayed as a new entry.

Amending/ deleting leave requests summary	
Steps	**Actions**
1	Go to the ‘Working Time’ area and click on ‘Leave Overview’
Deleting leave requests	
2 (a)	Find the ‘Leave Request’ you want to delete.
3 (a)	Click on the delete icon in the action column
4 (a)	A message box will come up asking you to confirm whether you want to delete ‘Leave Request’. Click ‘Yes’ or ‘No’.
Amending leave requests	
2 (b)	Select the leave that you wish to edit.
3 (b)	Change the data field that needs to be changed and follow it though like you were making a new leave request. Note: the fields that can be changed are: time, date, type of leave.

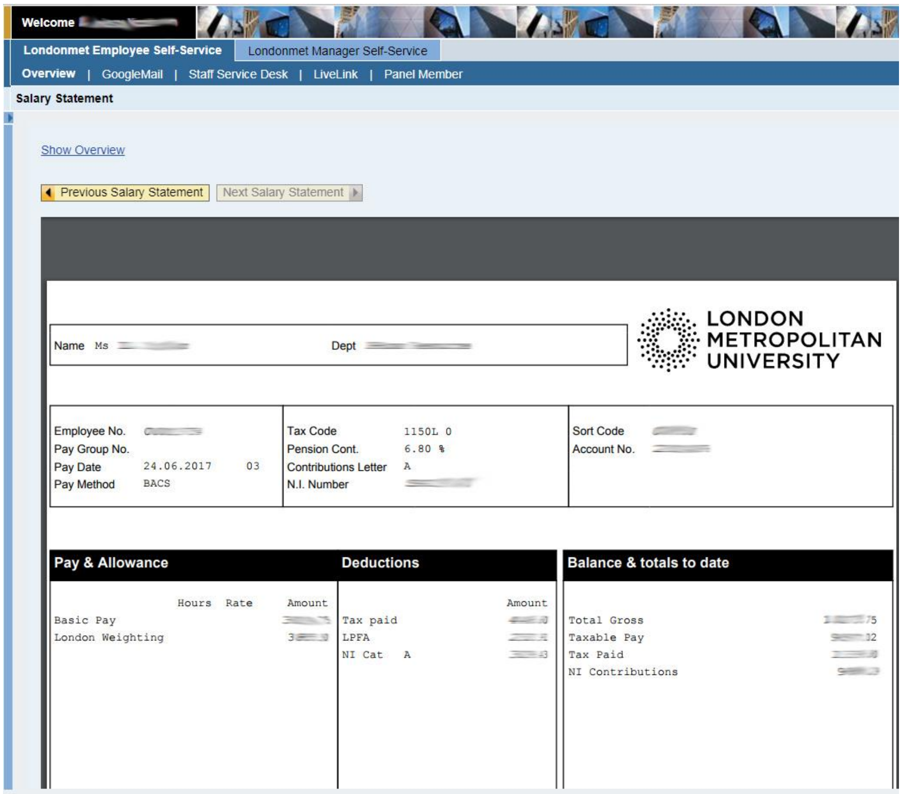
4. Payments

4.1 Salary statements

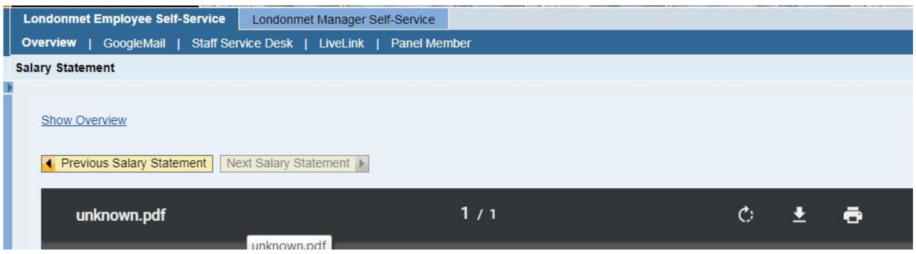
The ‘Payment’ section contains your current and previous payment statements.

To access your statements, click the ‘Salary Statement’ link. This will bring up your current salary payslip in a separate window.

Note: Select previous statement to view the last month’s payslip.



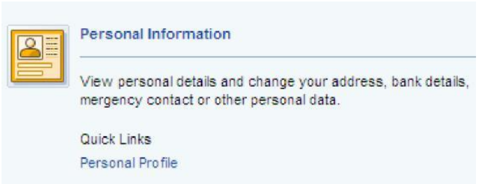
You will be able to view your payment date, the ‘Gross Amount’ and ‘Payment Amount’ summaries by expanding the ‘Show Overview’ tab.



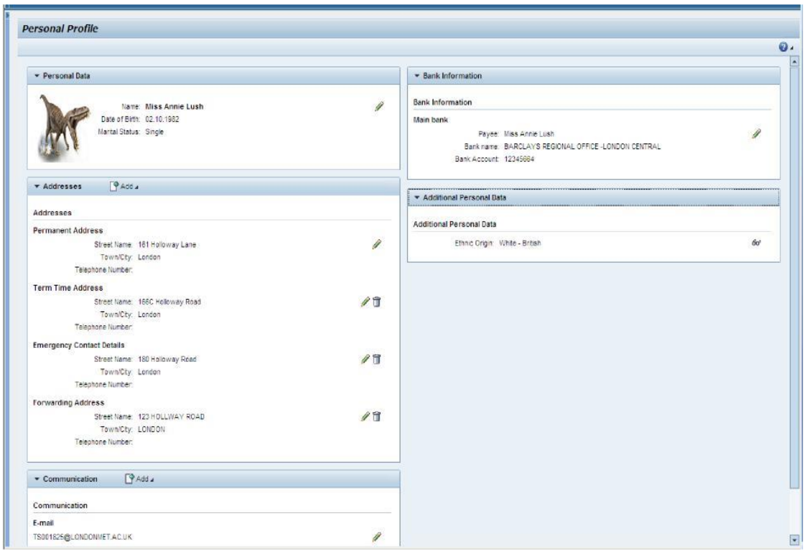
5. Personal profile

5.1 Personal information

You can view, update and edit your personal details in the personal information section.



You can view or edit any of your details in ‘Personal Profile’ in the six different heading/areas..



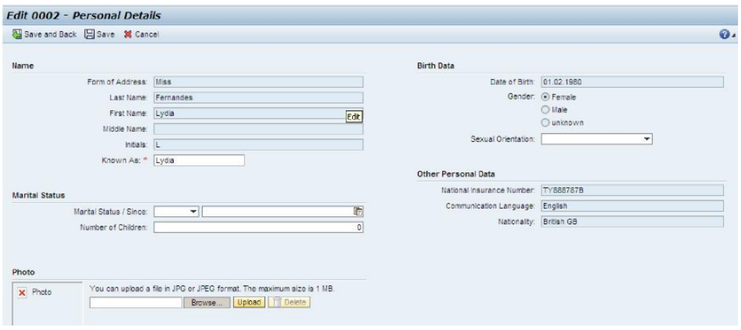
Note: To make changes to any areas, select the pencil icon or, to delete, click the dustbin icon. To add details, click on the add icon

5.1.1 Personal data

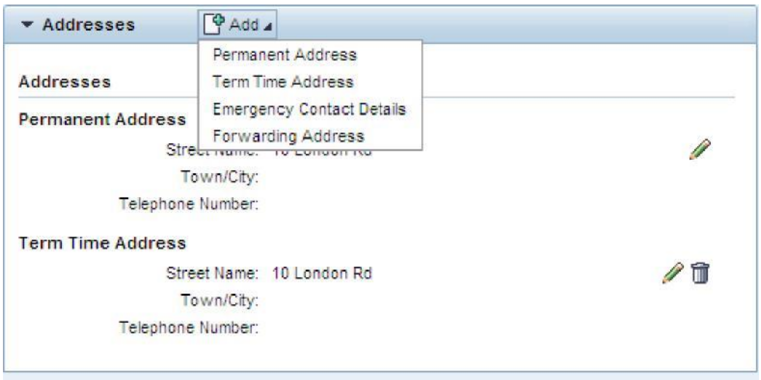
Within ‘Personal data’, you can change your ‘Known As’ name; your marital status and sexual orientation; and you are able to add a photo. Your ‘Known As’ name and your uploaded photo will be visible on the ‘Employee Search’.

Note: All white fields can be edited.

5.1.2 Addresses

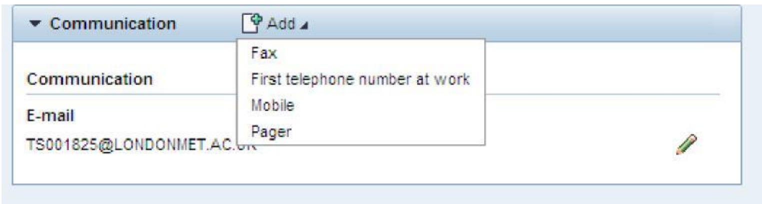


This section contains your permanent and term time address details which are editable. In addition, the dropdown list contains your emergency contact and forwarding address details.



5.1.3 Communication

Here you can edit the way in which you would like the University to communicate with you.

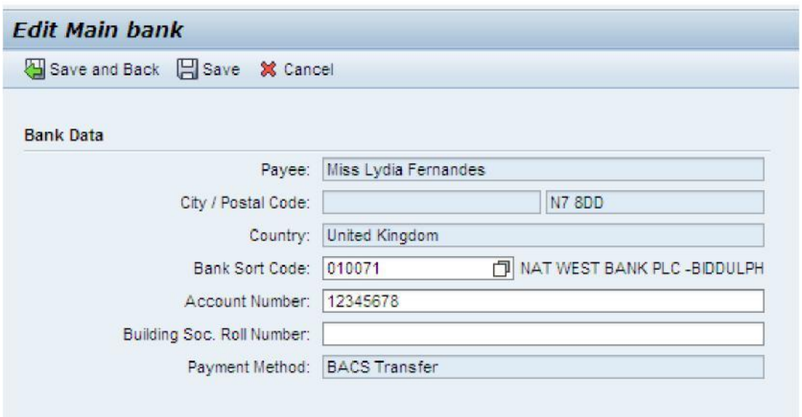


Note: You can edit any data with a pencil icon next to it.

5.1.4 Bank information

You are able to view and change your bank details.

Note: You can only change the white fields. The greyed out fields are locked.



Note: You will not be able to change your bank information during the monthly payroll processing as the system is locked for a week to allow time for the payroll to be checked and run.

5.1.5 Additional personal data

This data can only be viewed and not edited.

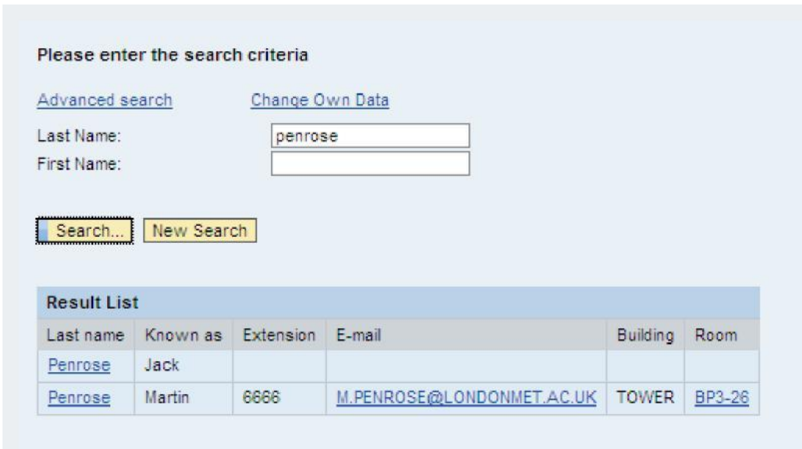
6. Employee search

Employee search is similar to the White Pages staff telephone directory facility on the ‘Staff Zone’. You will find this section under the main workbench.

6.1 Who is who

The ‘Who is who’ link is a staff telephone directory similar to the ‘White Pages’ telephone directory on the staff zone.

Tip: You can enter in the last name or first name of the person you are searching for or do a * wildcard search. Once you have pressed the search button a list will appear in the ‘Result List’ as shown below.


Please enter the search criteria

Advanced search   Change Own Data

Last Name: penrose

First Name:

Search... New Search

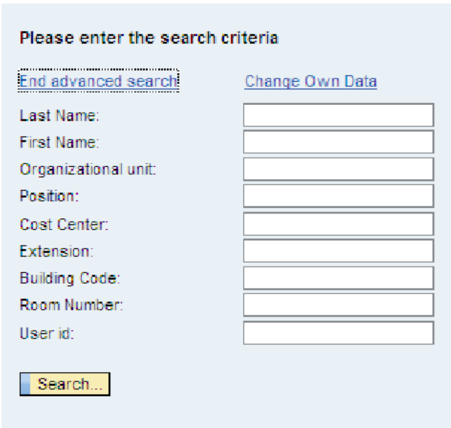
Result List

Last name	Known as	Extension	E-mail	Building	Room
Penrose	Jack				
Penrose	Martin	6666	M.PENROSE@LONDONMET.AC.UK	TOWER	BP3-26

Once you have found the person that you are searching for, you can select them and view their profile details, as shown below.

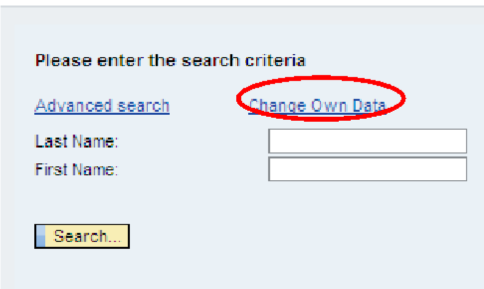
6.1.1 Advanced search

You are also able to carry out an advanced search for staff using the following headings as shown below:

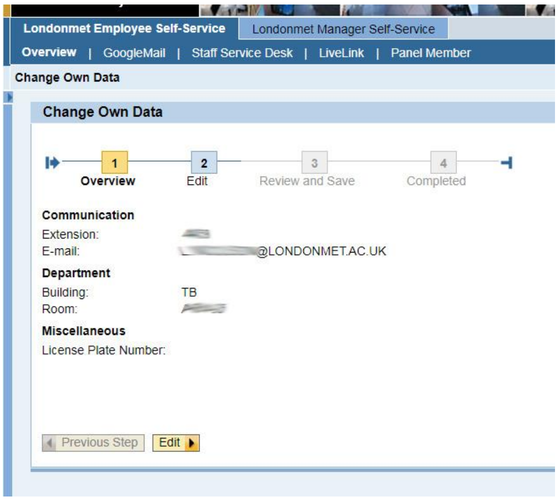


6.1.2 Change you own data

To change your own data, you will have to click on the underline that says ‘Change Own Data.

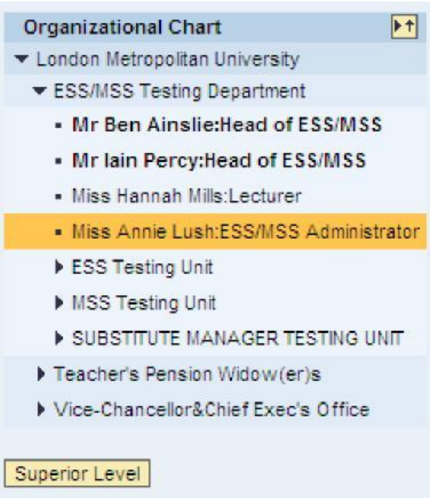


There are three stages to complete in editing your own data.



6.2 Organisation chart

The organisational chart displays the organisational structure and will show you who your line manager is.



You can view the full university structure by pressing the button at the bottom called ‘Superior Level’. This will take you up a level each time, until you have reached the highest level, at which point the following message will be displayed: