Integrated HR/Payroll System Project

ResourceLink User Guide

Employee MyView – Changing My Bank Details

Document:	Employee MyView – Changing My Bank Details
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Author:	

1 Employee MyView – Changing My Bank Details

Document Control

1.1 Table of Contents

1.2 Change History

VERSION	STATUS	DATE	AUTHOR	SUMMARY OF CHANGES
1.1	DRAFT	20/11/14		Initial Draft
1.2	Amend	12/01/15		Change to layout
1.3	FINAL	30/01/15		Update Screens

1.3 Document Approval

Document Issued By:	
Name:	
Position:	
Company:	

Document Approved By:	
Name:	Project Manager
Position:	
Company:	
Date:	
Version:	

1.4   Introduction

Welcome to the Highland Council's Self-Service Portal. A standalone portal has been created for Highland Council employees to review their (historical) payslips online. There is also an opportunity for a Highland Council employee to review and change details to the following:

- Contact Details
- Personal Details
- Bank Details
- Emergency Contact Details
- Equal Opportunities Details
- Doctors Details

Additional modules such as web expenses and holiday requests will be introduced over the next few months

1.5   Purpose of Document

This document is to be used 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 is an employee of the Highland Council.

- The Operator has a Highland Council email address.

- The Operator has received an introductory email with a link to the self-service portal.

1.7   User Guide overview

- Logging into MyView
- Viewing My Bank Details
- Amending My Bank Details

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

1.9   Help & Support

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 your Self-Service SUPER USER advising what task you were trying to perform during your MyView session.

Page not displaying

If you click on a module and you get the following message
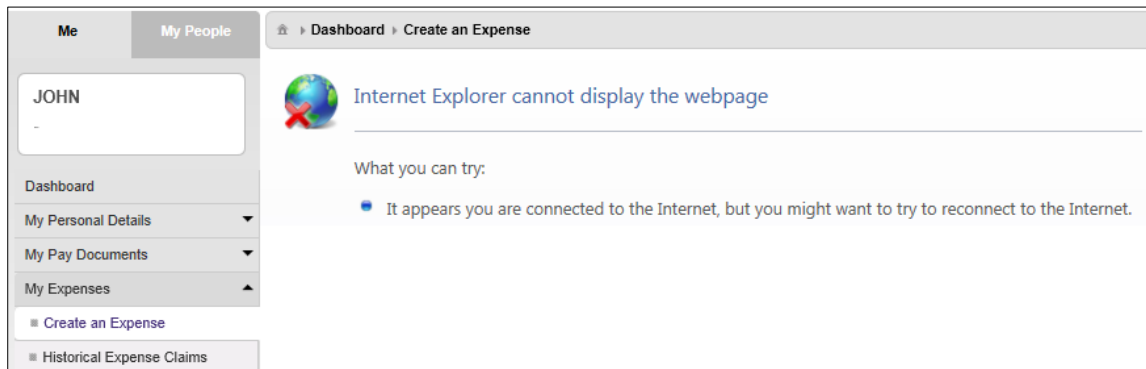
Please report this error to your Self-Service SUPER USER advising what task you were trying to perform during your MyView session. They will contact FSAT for an update.
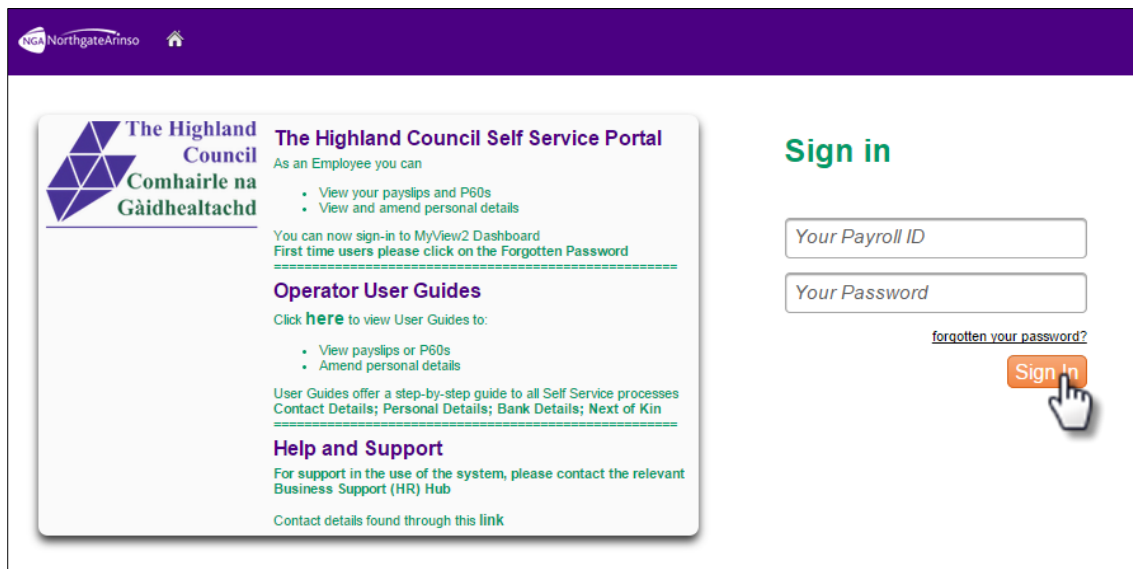
Alerts

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
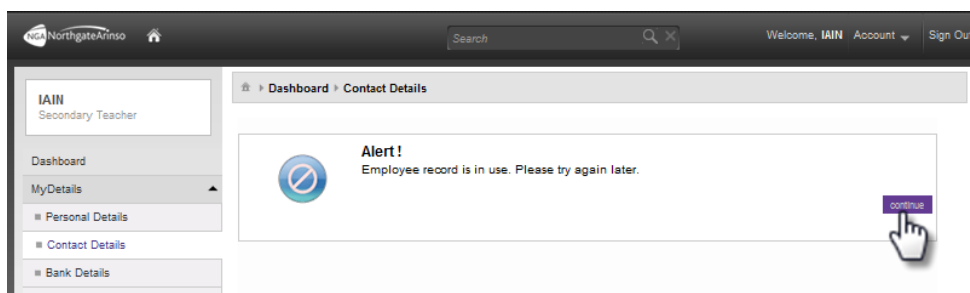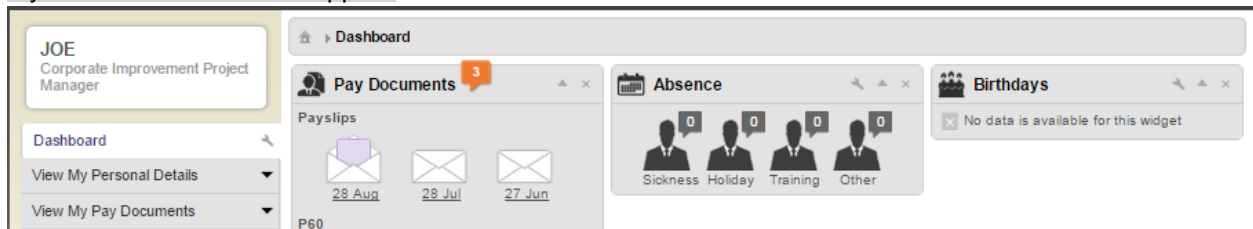
2 Logging into MyView

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/**

- ➤ 2.3   At [Your Password ID], enter Payroll Number
- ➤ 2.4   At [Your Password], enter Password
- ➤ 2.5   Click on [Sign In]

MyView – Dashboard will appear
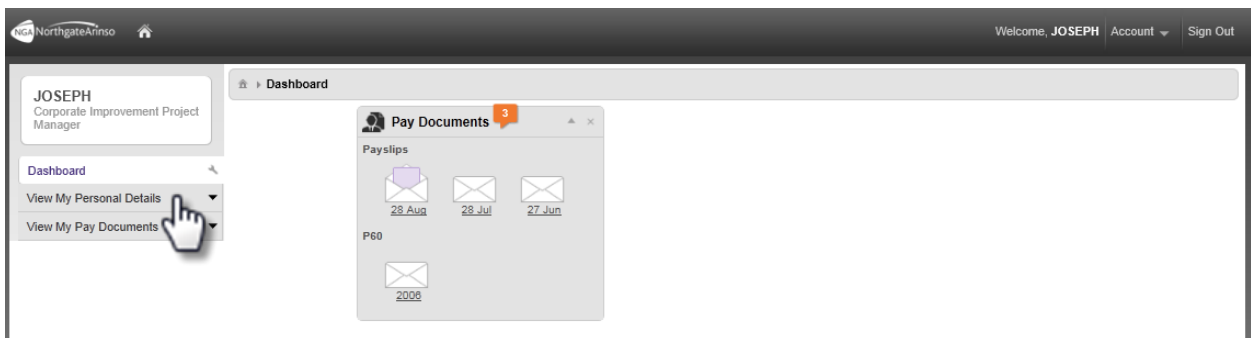
3   Changing My Bank / Building Society Details

This module enables you to amend your bank / building society details when required. In order to amend your bank / buidling society details – there are some important but simple instructions that you must follow.
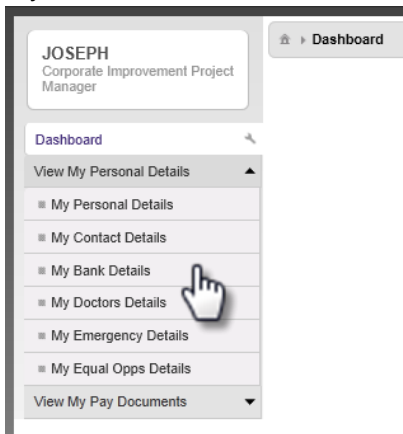
3.1   Changing Bank Details

From Dashboard Main Menu

> ➢ 3.1.1   At [View My Personal Details], manoeuvre mouse and click on bar
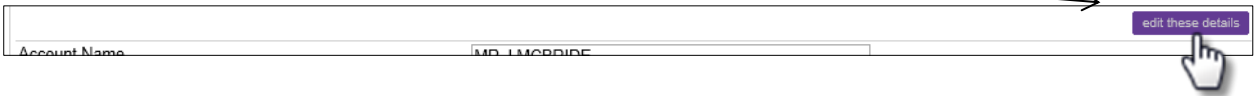

My Personal Details menu will appear

> ➢ 3.1.2   Click on [My Bank Details]

My Bank Details will appear (onscreen details are available)

> ➢ 3.1.3   Click on [edit these details]

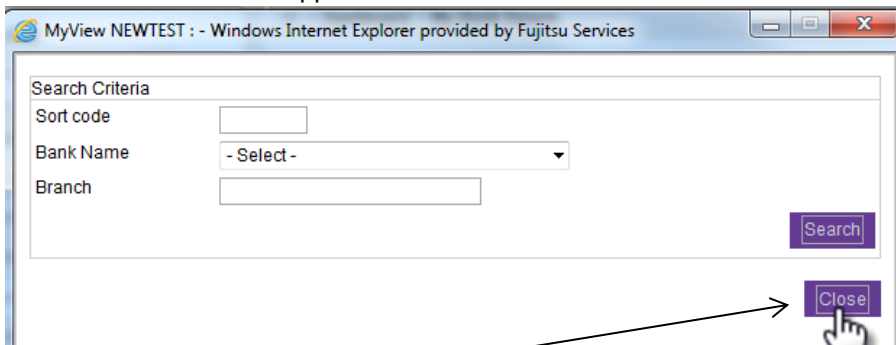The edit box changes from [edit these details] to [back to view only mode]

> ➢ 3.1.4   At [Account Name], enter new account name (if required)
> ➢ 3.1.5   At [Account Number], enter new account number
> ➢ 3.1.6   At [Account Type], click on drop down menu and select Account Type (if required)
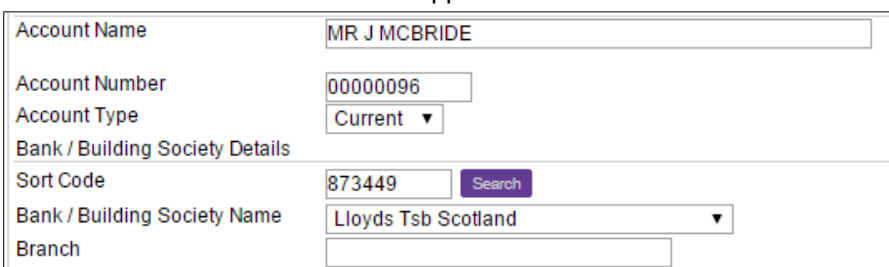

> ➢ 3.1.7   At [Sort Code], enter overtype existing sort code with new sort code and click search

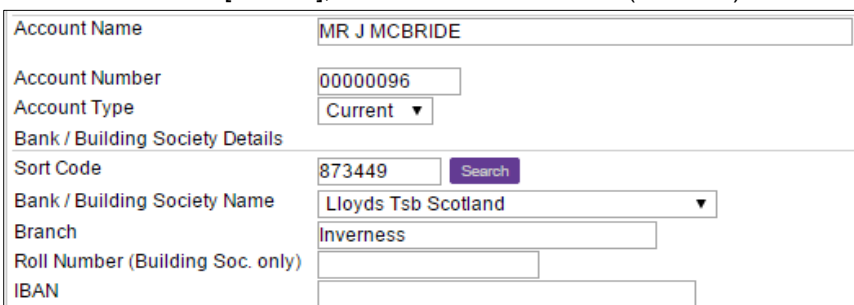Search Criteria box will appear

> ➢ 3.1.8   Click [Close]

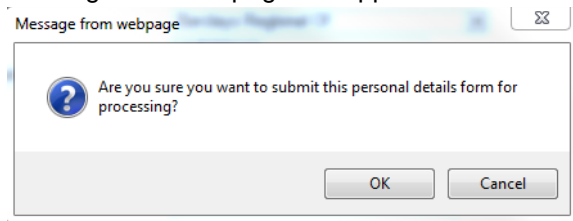New Bank name and sort code will appear

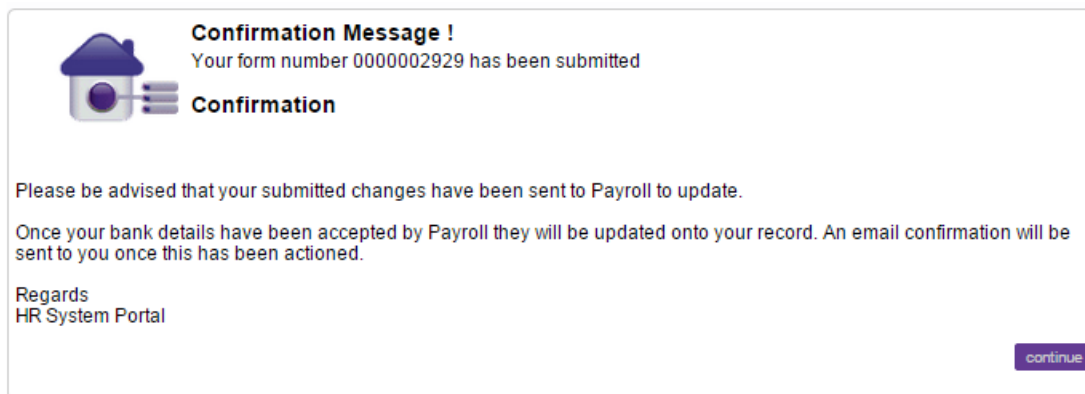> ➢ 3.1.9   At [Branch], enter new branch name (if known)

> 3.1.10   Click [Submit]

Message from webpage will appear on screen

Message from webpage

(?) Are you sure you want to submit this personal details form for processing?

OK   Cancel

> 3.1.11   Click [OK]

On screen confirmation message page will appear

Confirmation Message !
Your form number 0000002929 has been submitted

Confirmation

Please be advised that your submitted changes have been sent to Payroll to update.

Once your bank details have been accepted by Payroll they will be updated onto your record. An email confirmation will be sent to you once this has been actioned.

Regards
HR System Portal

continue

> 3.12   Click [Continue]

Personal Details summary page will appear showing that you have submitted your new bank details.

Personal Details [You have 7 forms]
The list of forms below allow the following changes to be made:

- Personal Details - this will allow you to view your name, date of birth and NI number etc as defined on ResourceLink. If your name changes please send the appropriate certificate to HR for verification. You can change your "Known As" name if you wish
- Contact Details - this will allow you to update your home address, phone numbers and email address etc
- Bank - This will allow you to update ResourceLink with your new bank/building society details
- Doctor - This will allow you to update ResourceLink with your Doctors details
- Emergency - this will allow you to update ResourceLink with your next of kin details and a separate emergency contact if you wish it to be a different person
- Equal Opportunities - this will allow you ro update ResourceLink with various details

- Bank Details
- Contact Details
- Doctor Details
- Emergency Contact Details
- Equal Opportunities Details
- Personal Details

Submitted

Date	Form	Description
25/11/2014	0000002607	Bank Details

**At this point, Payroll will be notified that you have submitted changes to your bank details.

Payroll will NOT accept the submitted change to bank details into ResourceLink if salaries are pending transmission into employee's bank accounts. Once Payroll has accepted the change to bank details a system generated email confirmation will be received by the employee.

4 Logging Out

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