

# **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**

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## 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

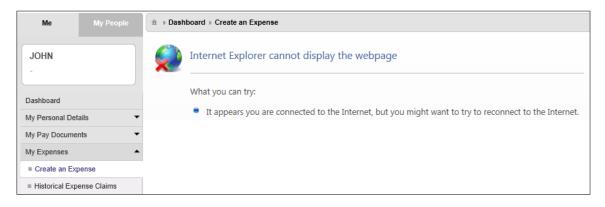
"STOP" "MyView : Session Ended – Your request cannot processed at this time".

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

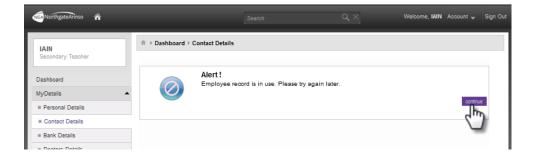




Please report this error to your Self-Service SUPER USER advising what task you were trying to perform during your MyView session. They will contact FSAT for an update.

#### <u>Alerts</u>

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





#### Logging into MyView 2

This first step is to show how you log into MyView

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

The Highland Council	The Highland Council Self Service Portal As an Employee you can	Sign in
Comhairle na Gàidhealtachd	<ul> <li>View your payslips and P60s</li> <li>View and amend personal details</li> </ul>	
	You can now sign-in to MyView2 Dashboard First time users please click on the Forgotten Password	Your Payroll ID
	Operator User Guides	Your Password
	Click here to view User Guides to:	(
	View payslips or P60s     Amend personal details	forgotten your passwor Sign L
	User Guides offer a step-by-step guide to all Self Service processes Contact Details; Personal Details; Bank Details; Next of Kin	2
	Help and Support	
	For support in the use of the system, please contact the relevant Business Support (HR) Hub	
	Contact details found through this link	

- At [Your Password ID], enter Payroll Number > 2.3
- $\geq$ 2.4 At [Your Password], enter Password
- > 2.5 Click on [Sign In]

MyView – Dashboard will appear

JOE				
Corporate Improvement Project Manager	🔊 Pay Documents 👂 🔹 🔺	Absence 🔍 🔺	× 🛗 Birthdays 🔍 🔺 ×	
	Payslips		No data is available for this widget	
Dashboard				
View My Personal Details	- 28 Aug 28 Jul 27 Jun	Sickness Holiday Training Other		
View My Pay Documents				



## 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 / building 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

NorthgateArinso 🏠		Welcome, JOSEPH Account 🛩 Sign Out
JOSEPH		
Corporate Improvement Project Manager	🔊 Pay Documents 🔑 🔹 🔺	
	Payslips	
Dashboard		
View My Personal Details	28 Aug 28 Jul 27 Jun	
View My Pay Documents	P60	
-	2008	

#### My Personal Details menu will appear



### > 3.1.2 Click on [My Bank Details]

My Bank Details will appear (onscreen details are available)

		edit these details
Account Name	MR A MCBRIDE	
Account Number	00966298	
Account Type	Current	
Bank / Building Society Details		
Sort Code	801215	
Bank / Building Society Name	Bank Of Scotland	
Branch	ABERDEEN UNIVERSITY BRANCH	
Roll Number (Building Soc. only)		
IBAN		
		Back



> 3.1.3 Click on [edit these details]

The edit box of	changes from [edit these details] to [back to view only mode]	
Account Namo		 edit these details
		3
> 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)

		back to view only mode
Account Name	MR J MCBRIDE	
Account Number Account Type	00000096 Current ▼	

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

#### Search Criteria box will appear

MyView NEWTES	T : - Windows Internet Explorer provided by Fujitsu Servi	ces 🗖 🗖 🗙
Search Criteria Sort code Bank Name Branch	- Select -	Search
> 3.1.8	Click [Close]	

#### New Bank name and sort code will appear

Account Name	MR J MCBRIDE
Account Number	0000096
Account Type	Current 🔻
Bank / Building Society Details	
Sort Code	873449 Search
Bank / Building Society Name	Lloyds Tsb Scotland
Branch	

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

Account Name	MR J MCBRIDE
Account Number	0000096
Account Type	Current V
Bank / Building Society Details	
Sort Code	873449 Search
Bank / Building Society Name	Lloyds Tsb Scotland
Branch	Inverness
Roll Number (Building Soc. only)	
IBAN	



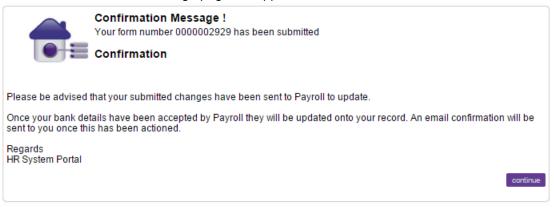
> 3.1.10 Click [Submit]

#### Message from webpage will appear on screen

Messa	ige fro	rom webpage	23
	?	Are you sure you want to submit this personal details fo processing?	rm for
		ОК	Cancel

#### > 3.1.11 Click [OK]

On screen confirmation message page will appear



#### > 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:
<ul> <li>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</li> <li>Contact Details - this will allow you to update your home address, phone numbers and email address etc</li> <li>Bank - This will allow you to update ResourceLink with your new bank/building society details</li> <li>Doctor - This will allow you to update ResourceLink with your next of kin details</li> <li>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</li> <li>Equal Opportunities - this will allow you ro update ResourceLink with various details</li> </ul>
<ul> <li>Bank Details</li> <li>Contact Details</li> <li>Doctor Details</li> <li>Emergency Contact Details</li> <li>Equal Opportunities Details</li> <li>Personal Details</li> </ul>
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.