

Simply Personnel Self Service

A Guide for Employees

Simply Personnel Self-Service Module

This document provides step-by-step guide for employees to give an easy understanding on use of the Self Service Module.

If at any time you need help or just need some questions answered please use our on-line helpdesk at www.simplypersonnel.co.uk where you will find comprehensive articles and an option to open a support ticket.

Thank you

The Simply Personnel Team.

Logging into the System

The Self Service Module is accessed via a link which will then take you the login page, where you will be asked to enter your login details.

Login

UserName:	<input type="text" value="Dgarner"/>	Book mark this page
Password:	<input type="password" value="•"/>	Forget me on this computer
Change Password:	<input type="checkbox"/>	
<input type="checkbox"/> Remember me on this computer	<input type="button" value="Login"/>	Forgot Password?

Enter the Employee username and password. You can change your current password to something more memorable. To do this you must enter the current username and password and then tick the 'Change Password' option.

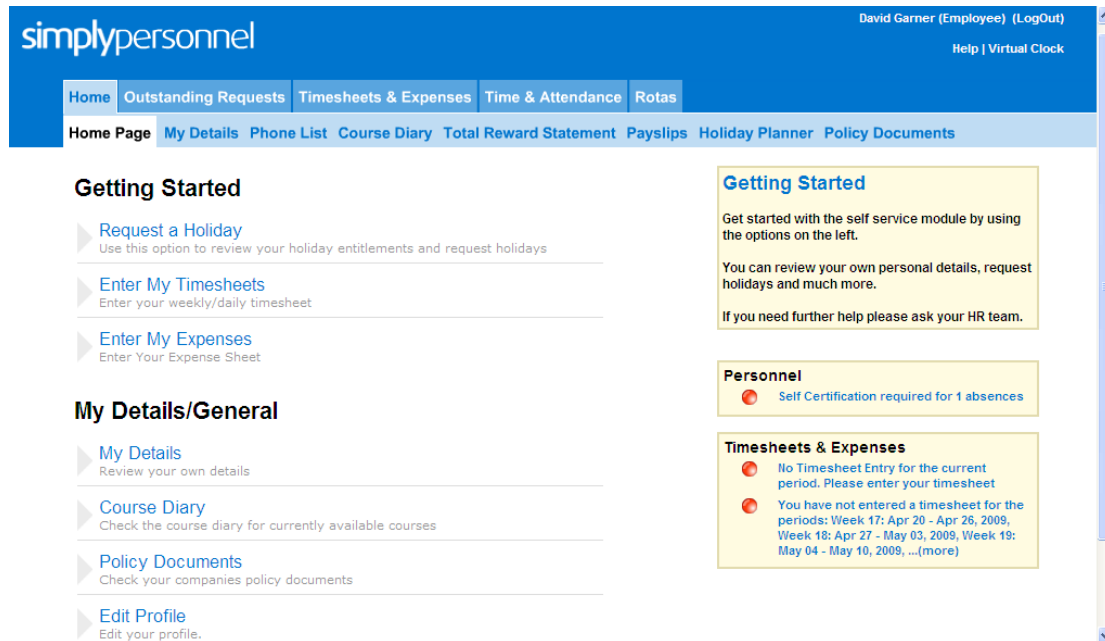
Login

UserName:	<input type="text" value="Dgarner"/>	Book mark this page
Password:	<input type="password" value="•"/>	Forget me on this computer
Change Password:	<input checked="" type="checkbox"/>	
Password:	<input type="text"/>	
Confirm Password:	<input type="text"/>	
<input type="checkbox"/> Remember me on this computer	<input type="button" value="Login"/>	Forgot Password?

Once the box is ticked you will be given two boxes, one for the new password and the second box to confirm the new password. Then Click 'Login' and this will save your new password and take you to the employee home page.

Once Logged in...

You will be greeted with the main employee's dashboard, as shown below.



The screenshot shows the 'simplypersonnel' employee dashboard for David Garner. The top navigation bar includes 'Home', 'Outstanding Requests', 'Timesheets & Expenses', 'Time & Attendance', and 'Rotas'. Below this is a secondary navigation bar with 'Home Page', 'My Details', 'Phone List', 'Course Diary', 'Total Reward Statement', 'Payslips', 'Holiday Planner', and 'Policy Documents'. The main content area is divided into three columns:

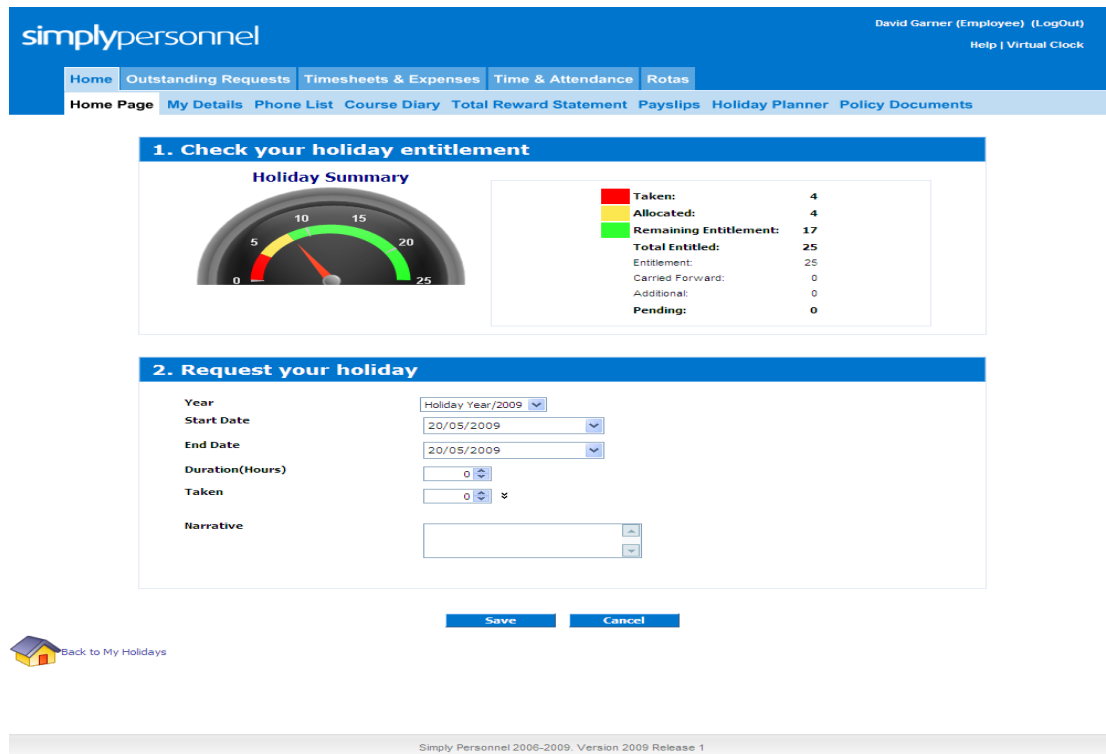
- Getting Started:** Contains links for 'Request a Holiday', 'Enter My Timesheets', and 'Enter My Expenses'.
- My Details/General:** Contains links for 'My Details', 'Course Diary', 'Policy Documents', and 'Edit Profile'.
- Alerts/Notifications:** A yellow box titled 'Getting Started' provides instructions on using self-service options. Below it, a 'Personnel' section shows a red dot indicating 'Self Certification required for 1 absences'. A 'Timesheets & Expenses' section shows two red dots: one for 'No Timesheet Entry for the current period' and another for missing timesheet entries for specific weeks in 2009.

As an employee you can see some of your personnel details, your holiday and absence details a holiday planner for your department and a telephone list for the company.

The Dashboard

You can easily navigate through the system by selecting the option titles, this will then take you to the relative screen.

To easily book a holiday select click on **request a holiday** on the main dashboard, this will take you to the following screen.



1. Check your holiday entitlement

Holiday Summary

Taken:	4
Allocated:	4
Remaining Entitlement:	17
Total Entitled:	25
Entitlement:	25
Carried Forward:	0
Additional:	0
Pending:	0

2. Request your holiday

Year:


Start Date:

End Date:

Duration(Hours):

Taken:

Narrative:

 [Back to My Holidays](#)

Simply Personnel 2006-2009. Version 2009 Release 1

This will show your holiday entitlement for the current holiday year.

To request a holiday got to section 2 at the bottom of the page, all you need to do is enter the requested date from the calendar then click on save.

This will automatically inform the person who authorises your holiday requested, it will show on their personal login screen and will also send an email directly to them.






You can also book a holiday via My Details> Attendance> Holiday Details, this will take you to the screen below.

simplypersonnel David Garner (Employee) (LogOut)
Help | Virtual Clock

Home Outstanding Requests Timesheets & Expenses Time & Attendance Rotas

Home Page My Details Phone List Course Diary Total Reward Statement Payslips Holiday Planner Policy Documents

 David Garner (7)

	First Name:	David	
	Last Name:	Garner	 0113 2949632
	Reports To:	Charles Abbey 	 garnerd@simplypersonnel.com
	Location:	35 St Annes Avenue, Leeds.	
	Date Commenced:	10/01/2005 (4 year(s) 4 month(s) 10 day(s))	


Personal Attendance Work Skills/Appraisals Training Documents

Holiday Planner **Holiday Details** Absence Details

[Book holiday](#)


























Your holiday entitlement

Holiday Summary



■ Taken:	4
■ Allocated:	4
■ Remaining Entitlement:	17
Total Entitled:	25
Entitlement:	25
Carried Forward:	0
Additional:	0
Pending:	0

Selected Year: Holiday Year/2009 [Book holiday](#)

Status	Start Date	End Date	Taken	Narrative	Authoriser(s)	 Download
	28/12/2009	28/12/2009	1	Boxing Day		 
	25/12/2009	25/12/2009	1	Christmas Day		 
	31/08/2009	31/08/2009	1	Summer Bank Holiday		 
	25/05/2009	25/05/2009	1	Spring Bank Holiday		 
	04/05/2009	04/05/2009	1	Early May Bank Holiday		 
	13/04/2009	13/04/2009	1	Easter Monday		 
	10/04/2009	10/03/2009	1	Good Friday		 
	01/01/2009	01/01/2009	1	New Year's Day		 

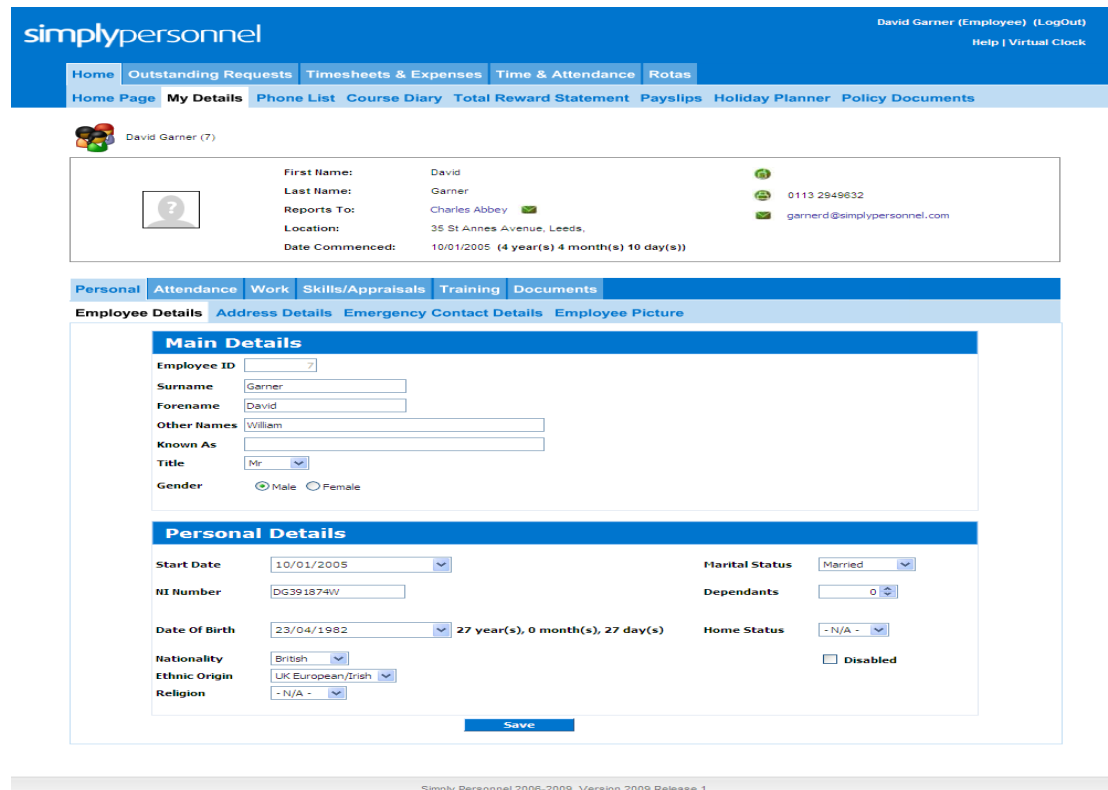
[Book holiday](#)

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It is very similar to the screen via the main dashboard but it will also list all of the days that you have booked, taken and are waiting for approval. At the bottom of this page you will see a blue tab that says 'book holiday'.

My Details

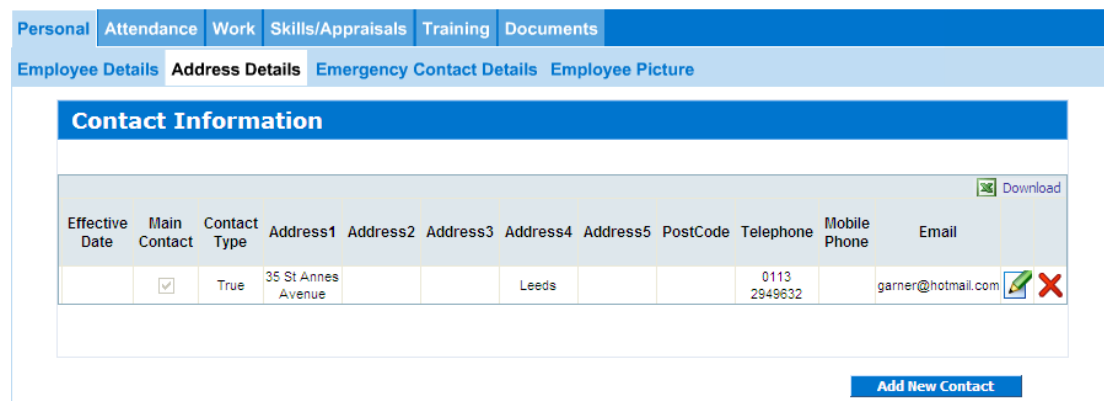
This screen will show your personal details. Your administrator may allow you to change these. If so, complete the new detail in the correct fields and click save, this will then go to the authoriser to be confirmed. It may also be 'read only'. In this case you will not be able to amend any details.



The screenshot shows the 'My Details' page for David Garner. At the top, there is a navigation bar with 'simplypersonnel' on the left and 'David Garner (Employee) (LogOut) Help | Virtual Clock' on the right. Below this is a secondary navigation bar with tabs: Home, Outstanding Requests, Timesheets & Expenses, Time & Attendance, Rotas, Home Page, My Details (selected), Phone List, Course Diary, Total Reward Statement, Payslips, Holiday Planner, and Policy Documents. The main content area shows a profile card for David Garner with fields for First Name, Last Name, Reports To, Location, and Date Commenced. Below this is a sub-navigation bar with tabs: Personal (selected), Attendance, Work, Skills/Appraisals, Training, and Documents. Under 'Personal', there are sub-tabs: Employee Details (selected), Address Details, Emergency Contact Details, and Employee Picture. The 'Main Details' section contains form fields for Employee ID, Surname, Forename, Other Names, Known As, Title, and Gender. The 'Personal Details' section contains form fields for Start Date, NI Number, Date Of Birth, Nationality, Ethnic Origin, Religion, Marital Status, Dependants, Home Status, and a Disabled checkbox. A 'Save' button is at the bottom of the form. At the very bottom of the page, a small footer reads 'Simply Personnel 2006-2009, Version 2009 Release 1'.

Select the tab you wish to view from the top bar, this then opens up other options below that you may be given access to view or amend.

To amend your address details select **address details** from the options bar.



The screenshot shows the 'Address Details' page. The navigation bar is the same as in the previous screenshot. The sub-navigation bar now has 'Address Details' selected. The main content area is titled 'Contact Information' and features a table with columns: Effective Date, Main Contact, Contact Type, Address1, Address2, Address3, Address4, Address5, PostCode, Telephone, Mobile Phone, and Email. There is a 'Download' button in the top right corner of the table area. The table contains one row of data. At the bottom right of the page, there is an 'Add New Contact' button.

Effective Date	Main Contact	Contact Type	Address1	Address2	Address3	Address4	Address5	PostCode	Telephone	Mobile Phone	Email
	<input checked="" type="checkbox"/>	True	35 St Annes Avenue			Leeds			0113 2949632		garner@hotmail.com

Click on the green pencil to amend existing details or add new contact via the button at the bottom. This will open up a further window.

Edit Contact Information

Main Contact	<input checked="" type="checkbox"/>
Contact Type*	- N/A - <input type="button" value="v"/>
Address*	<input type="text" value="35 St Annes Avenue"/> <input type="text"/> <input type="text" value="Leeds"/> <input type="text"/>
Post Code	<input type="text"/>
Telephone	<input type="text" value="0113 2949632"/>
Mobile Phone	<input type="text"/>
Email	<input type="text" value="garner@hotmail.com"/>
Effective Date	<input type="text"/> <input type="button" value="v"/>

As before once you have completed the correct information click on update, this will then send an alert and email to your authoriser.

You may have access to other screens such as emergency contacts, bank details, absences and training screens dependant on the access set by your administrator. Some of these screens are shown below.

Emergency Contact Details:

Employee Details
Address Details
Emergency Contact Details
Employee Picture

Emergency Contact

Name/Relation	<input type="text" value="Miriam Garner"/> <input type="button" value="v"/>	Wife <input type="button" value="v"/>	<input type="text" value="Michelle Garner"/> <input type="button" value="v"/>	Sister <input type="button" value="v"/>
Address	<input type="text" value="35 St Annes Avenue"/> <input type="text"/> <input type="text" value="Leeds"/> <input type="text"/>		<input type="text" value="35 St Annes Avenue"/> <input type="text"/> <input type="text" value="Leeds"/> <input type="text"/>	
Post Code	<input type="text"/>		<input type="text"/>	
Home Telephone	<input type="text" value="0113 2949632"/>		<input type="text" value="0113 2949632"/>	
Work Telephone	<input type="text" value="0113 2937541"/>		<input type="text" value="0113 2504018"/>	

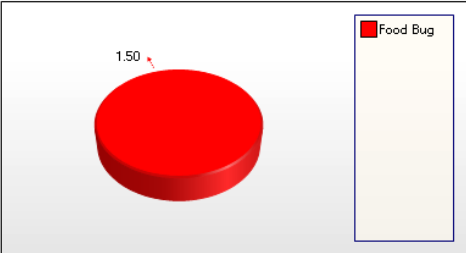
Medical Contact

Doctors Name	<input type="text"/>	Telephone1	<input type="text"/>
Address	<input type="text"/> <input type="text"/> <input type="text"/>	Telephone2	<input type="text"/>
Post Code	<input type="text"/>	Notes	<input type="text"/>

Absence Details:

Personal Attendance Work Skills/Appraisals Training Documents

Holiday Planner Holiday Details Absence Details



Total sick days this year:	0
Total sick days last year:	0
Total late this year:	0
Total late this year(Duration):	00:00
Total trip occurrences this year:	0
Total trip days this year:	0


Start Date: 01/01/2009 End Date: 31/12/2009

Absence Category	Reason	Duration	Consecutive Days	Date From	Date To
Sick	Food Bug	1.5	2.50	14/09/2009	15/09/2009

Download

If you have been absent you may be required to self certify it. If this is the case you will be sent an email and there will also be an alert on the main page when you log in.

Personnel

 Self Certification required for 1 absences

Click on the red circle and this will take you to the absence details page. The absence that will require your input will be shown in red.

Start Date: 01/01/2009 End Date: 31/12/2009

Absence Category	Reason	Duration	Consecutive Days	Date From	Date To
Sick	Food Bug	1.5	2.50	14/09/2009	15/09/2009
Sick	Headache	1	2.00	01/09/2009	01/09/2009

Download

Click on the green pencil to open up the absence, the window below will appear.

Absence Details

Absence Category*

Absence Reason*

Date From

Date To


Duration(Hours)

Duration ⌵

Comments

GP Consulted

Advice Given



Complete the information in the bottom 2 fields and then click on save.


This will automatically update the main personnel system and will also inform your line manager that they need to complete a back to work interview with you.



Bank Details:

Personal Attendance Work Skills/Appraisals Training Documents

Job Details Salary Details Bank Details Documents Notes

Banking Details

 Download

Bank Name	Address1	Address2	Address3	Address4	Address5	PostCode	Account Name	SortCode	Account Number	Roll Number	Main Details
HSBC Bank PLC	177 High Steet			Leeds		LS1 8JD		876432	29876542		True  

To edit your bank details click on the green pencil, this will open up the window below,

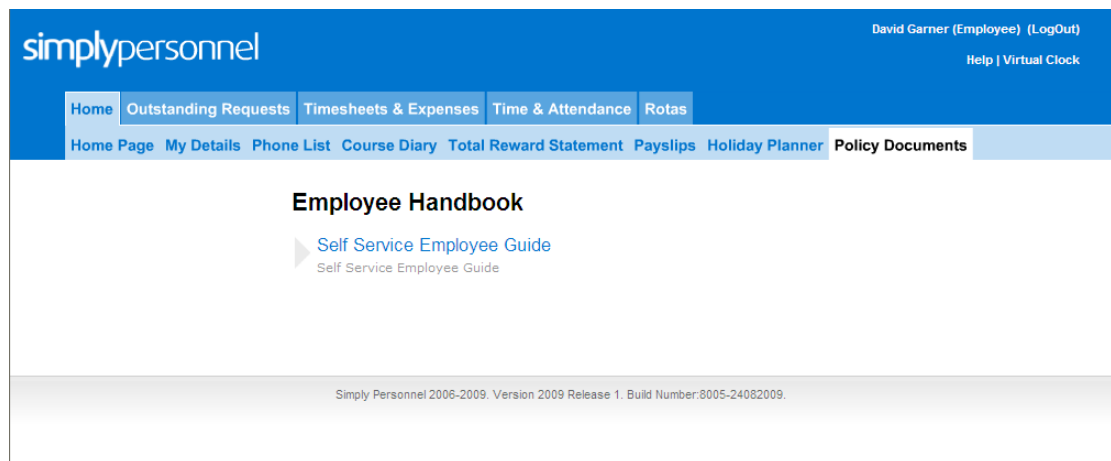
Edit Banking Information

Name*	<input type="text" value="HSBC Bank PLC"/>
Address	<input type="text" value="177 High Steet"/>
	<input type="text"/>
	<input type="text" value="Leeds"/>
	<input type="text"/>
Post Code	<input type="text" value="LS1 8JD"/>
Account Name	<input type="text"/>
Sort Code	<input type="text" value="876432"/>
Account Number	<input type="text" value="29876542"/>
Roll Number	<input type="text"/>
Main Details	<input checked="" type="checkbox"/>

[Update](#) [Cancel](#)

Policy Documents:

The administrator can load up documents such as the staff hand book and other certain policy and procedures. By selecting the policy documents tab you will be able to view these. Once read you will also be able to mark the document as 'read' so that the administrator can see what has or hasn't been read in a list.



If you have any other questions regarding the Self Service please contact your administrator.