MYOB Advanced

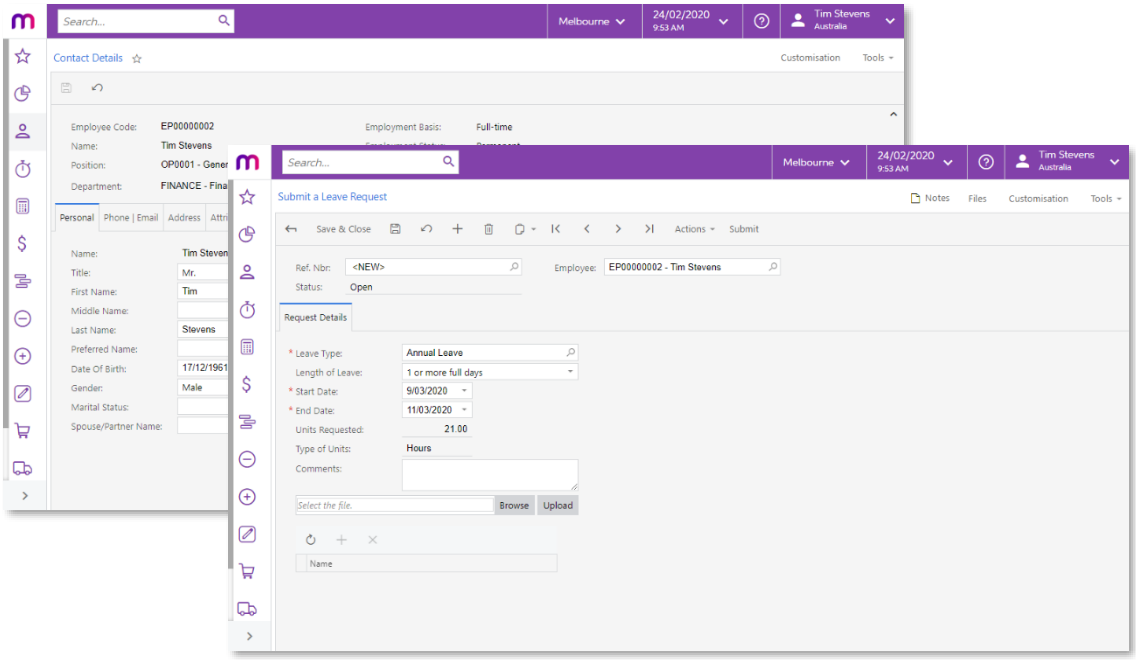
Employee Self-Service

Last Updated: 09 April 2020

Contents

Employee Self-Service

The self-service features available in MYOB Advanced allow employees to view and manage their own details, and to submit leave requests, which are then managed and processed in the Payroll module.



Mobile Access

With the exception of the Employee Calendar and Team Calendar screens (see page 8), all self-service functions are available in the MYOB Advanced mobile app, which can be downloaded from either the [Apple App Store] or the [Google Play Store].

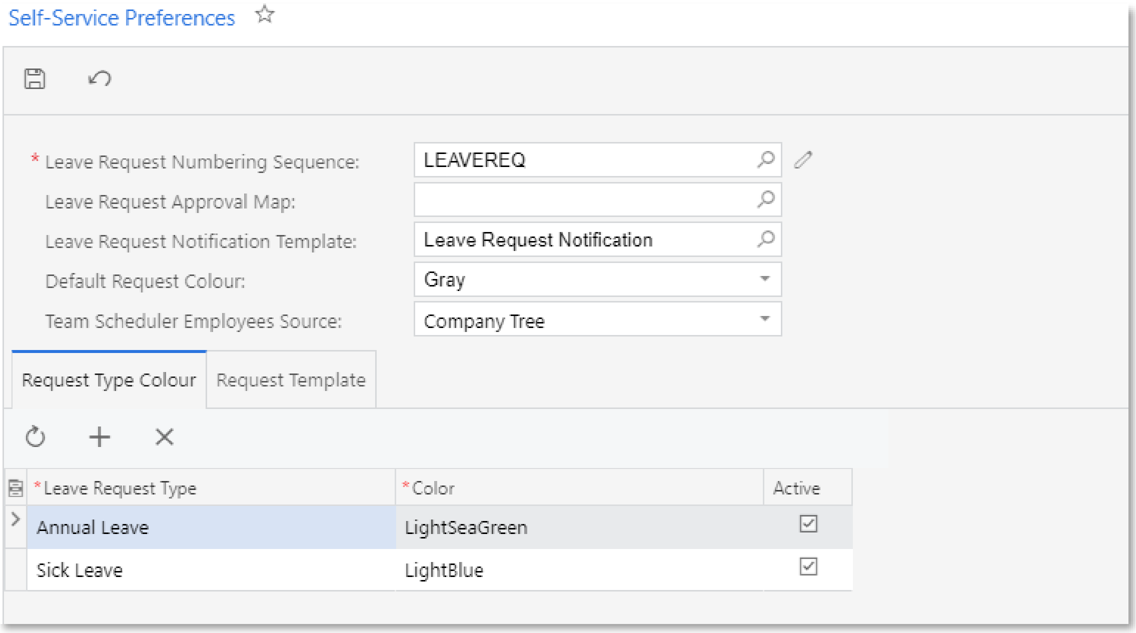
Setting up Employee Self-Service

Self-service features must be enabled by ticking the “Employee Self Service” feature on the Enable/Disable Features screen (CS10000).

Once enabled, the self-service features become available, but before they can be used by employees, the system must be set up to use the various functions.

Self Service Preferences

The Self Service Preferences screen (MPPP1010) lets you configure settings that affect the operation of the Employee Self Service module as a whole, including the Numbering Sequence, Approval Map and Notification Template to use for leave requests; and options that determine how leave requests will appear on the Employee and Team Calendars (see “Employee and Team Calendars” on page 10).



Leave Request Approval Map

By default, no Leave Request Approval Map is selected. When no map is specified—or when leave is requested by an employee who isn’t covered by the selected approval map—requests are approved automatically as soon as they are submitted.

MYOB recommends setting up an approval map, even if it is a simple map with a single approver. On the Assignment and Approval Maps screen, set up an approval map with the **Entity Type** set to “Submit a Leave Request”. We recommend adding the payroll admin user(s) to the approval map so that they can interact with the leave request process.

Leave Request Notification Template

A default Leave Request Notification template is provided—this is used to notify a manager that a leave request has been generated by a team member. You can review this template and make any necessary edits on the Notification Templates screen (SM2040PL).

Two notifications are provided in on the Automation Notifications screen (MYGI1000): Leave Request Approved and Leave Request Declined. These notify employees when their requests are approved/declined. Use the Automation Notifications screen to ensure that these notifications are active, and to make any necessary edits to them.

Setting up Leave Types

To make leave types visible in the Employee Self Service module, tick the **Allow Leave Request** option on the Additional Info tab of the Pay Items screen (MPPP2210) for each entitlement payment pay item that should be available to employees when making a leave request (see page 10). If you want to require employees to attach a document when they request leave, tick the **Require Attachment Upon Leave Request** option.

To make leave balances visible on the Leave Balances or Projected Leave Balance screens (see page 9), tick the **Show Leave Balances** and/or **Show Projected Leave Balances** options on the Rules tab of the Entitlements screen (MPPP3300) for each leave entitlement that you want to display.

Setting up Employees

To give an employee access to the features of the Employee Self Service module, a user record must be created for the employee on the Users screen (SM201010) as follows:

- The user record must include login and password details.
- The “People ESS” role must be ticked on the Roles tab.
- The “People User” licence type must be ticked on the Licence Types tab.
- The employee should be linked to the user record via the **Linked Entity** field on this screen.

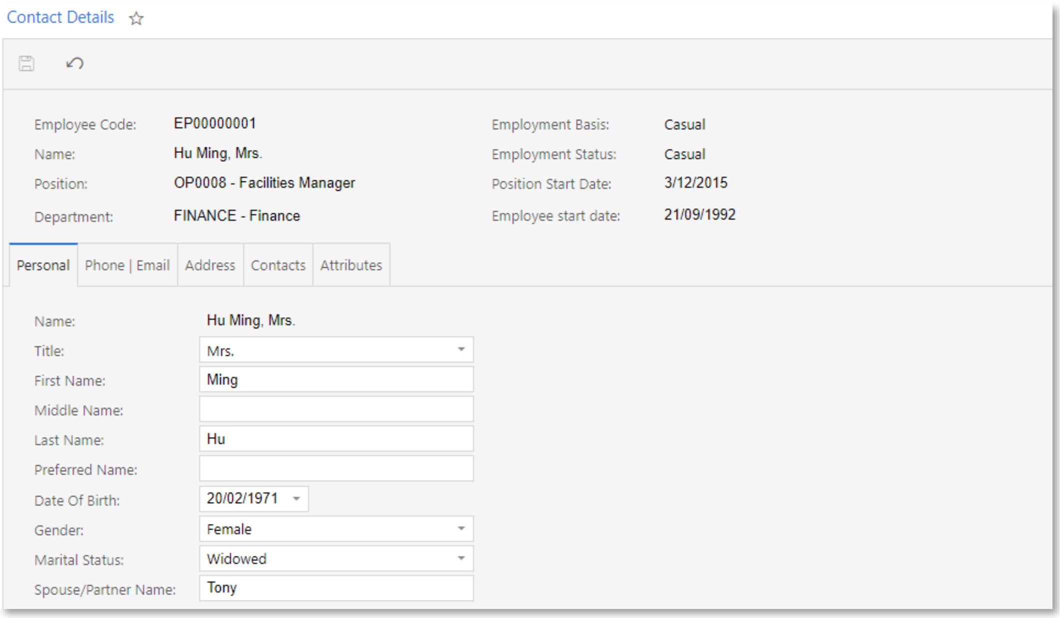
You must also set the default Pay Group for each employee—this is the pay group that will be associated with any leave requests they make. On the Employee Pay Groups screen (MPPP2250), make sure that the **Default Pay Group** box is ticked for the group that should be the employee’s default.

Employee Details

Employees who have been given access to the self-service features will be able to log in and access a variety of self-service screens.

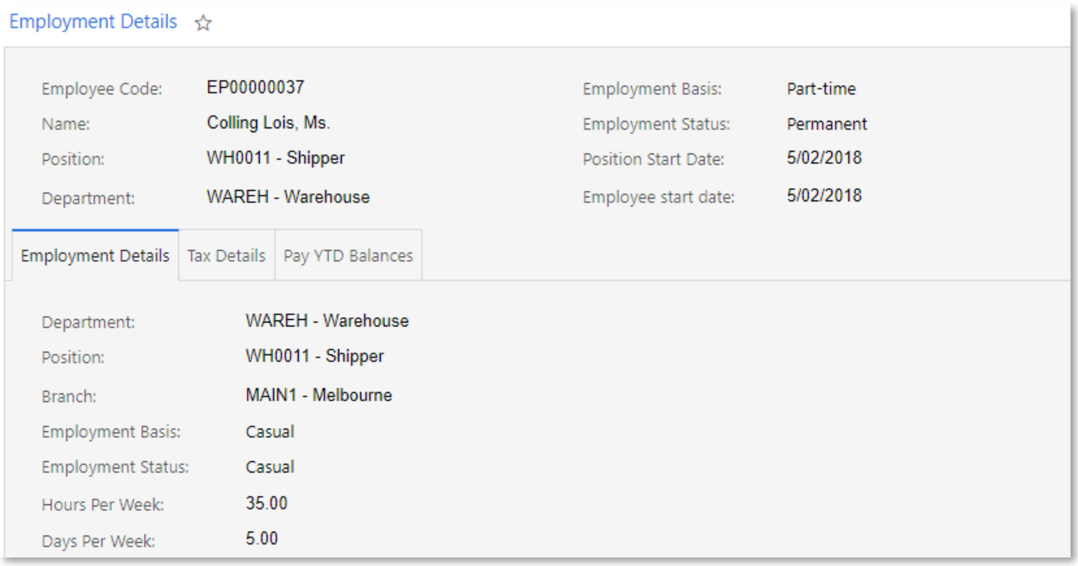
Contact Details

On the Contact Details screen (MPES3011), employees can view and edit their own personal and contact details. Employees can also add details of their emergency contacts, or other contacts like family members.



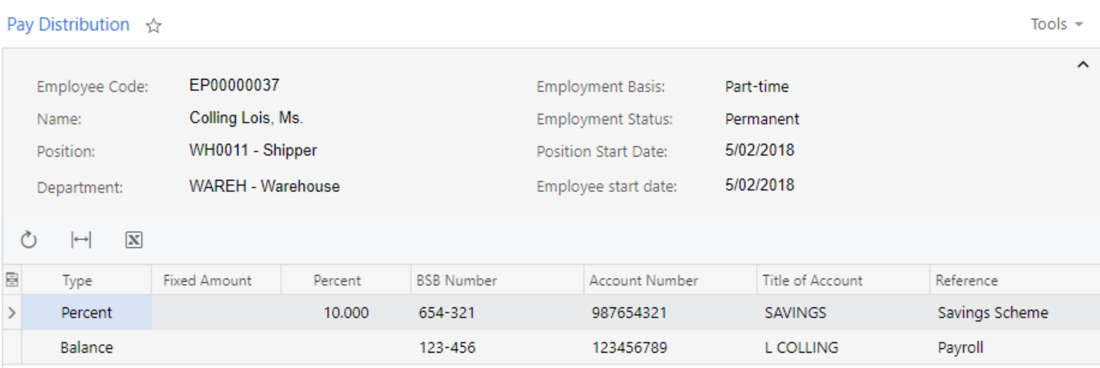
Employment Details

The Employment Details screen (MPES3011) allows employees to view details of their employment in the company, their tax details and their year-to-date balances. These details are all read-only.



Pay Distribution

The Pay Distribution screen (MPES3012) shows employees read-only information about how their pay is paid to them.

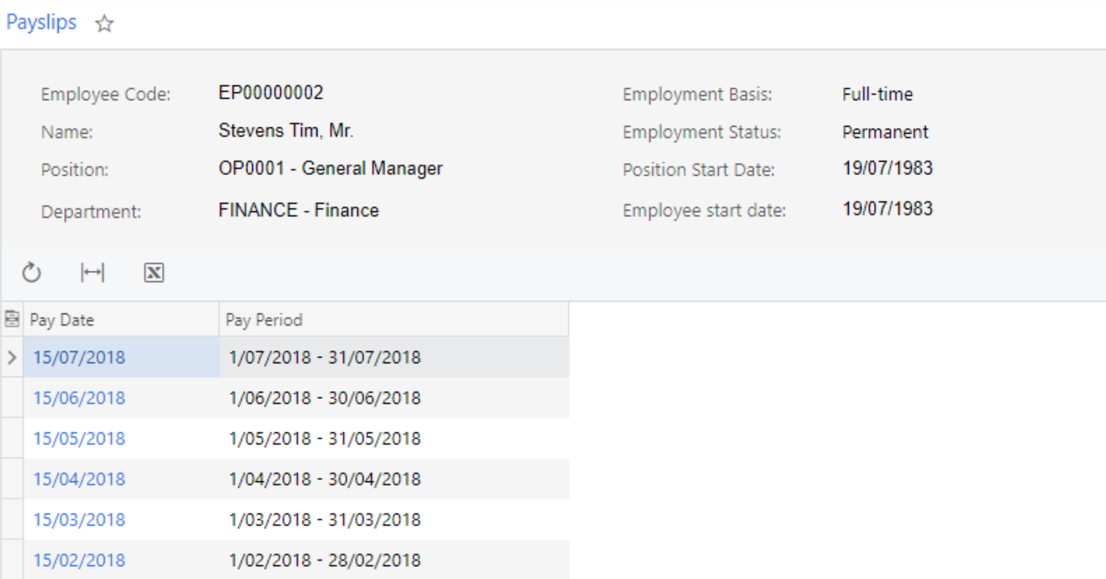


Superannuation

The Superannuation screen (MPES3013) shows employees read-only information about the superannuation contributions included in their pays.

Payslips

The Payslips screen (MPES3014) lists all of the employee's available payslips. The employee can click on the link in the **Pay Date** column to download the payslip for that date.

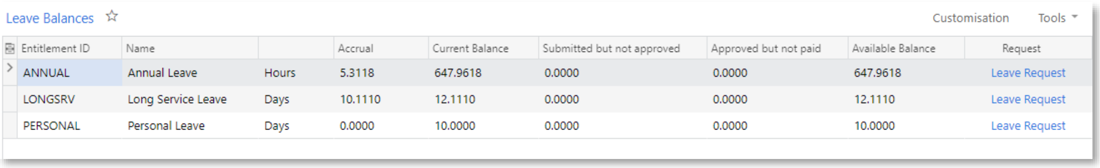


Requesting Leave

The self-service features integrate with the Payroll module to allow employees to request leave. Leave requests made in the self-service functions flow through to the Payroll module for processing; leave requests' statuses are then reported back to the self-service features so employees can track the progress of their requests.

Employee Leave Balances

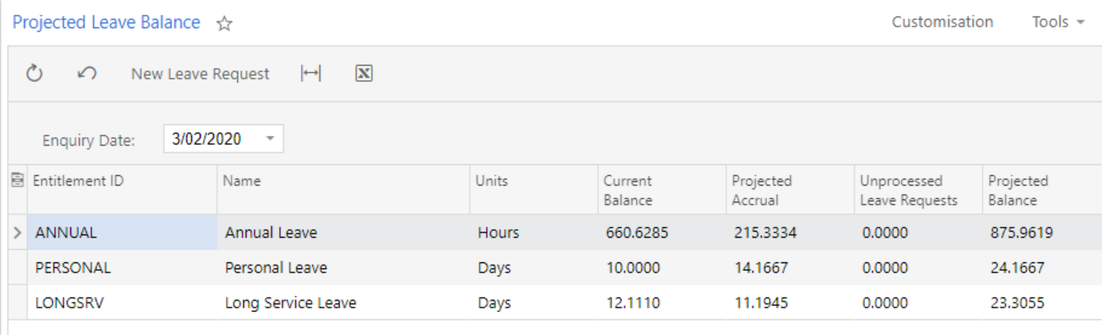
Employees can view their current leave balances on the Leave Balances screen (MPES3022):



Entitlement ID	Name		Accrual	Current Balance	Submitted but not approved	Approved but not paid	Available Balance	Request
ANNUAL	Annual Leave	Hours	5.3118	647.9618	0.0000	0.0000	647.9618	Leave Request
LONGSRV	Long Service Leave	Days	10.1110	12.1110	0.0000	0.0000	12.1110	Leave Request
PERSONAL	Personal Leave	Days	0.0000	10.0000	0.0000	0.0000	10.0000	Leave Request

Clicking one of the **Leave Request** links next to a leave type makes a new leave request for that type (see "Making Leave Requests" on page 12).

The Projected Leave Balance screen (MPES4012) lets employees enter a future date to check how much leave they will have by then, so that they can plan their leave requests more easily:



Entitlement ID	Name	Units	Current Balance	Projected Accrual	Unprocessed Leave Requests	Projected Balance
ANNUAL	Annual Leave	Hours	660.6285	215.3334	0.0000	875.9619
PERSONAL	Personal Leave	Days	10.0000	14.1667	0.0000	24.1667
LONGSRV	Long Service Leave	Days	12.1110	11.1945	0.0000	23.3055

Note: Leave projections are based on the employee's default Pay Group.

Employees can create a new leave request from this screen by clicking the **New Leave Request** toolbar button (see "Making Leave Requests" on page 12).

Employee and Team Calendars

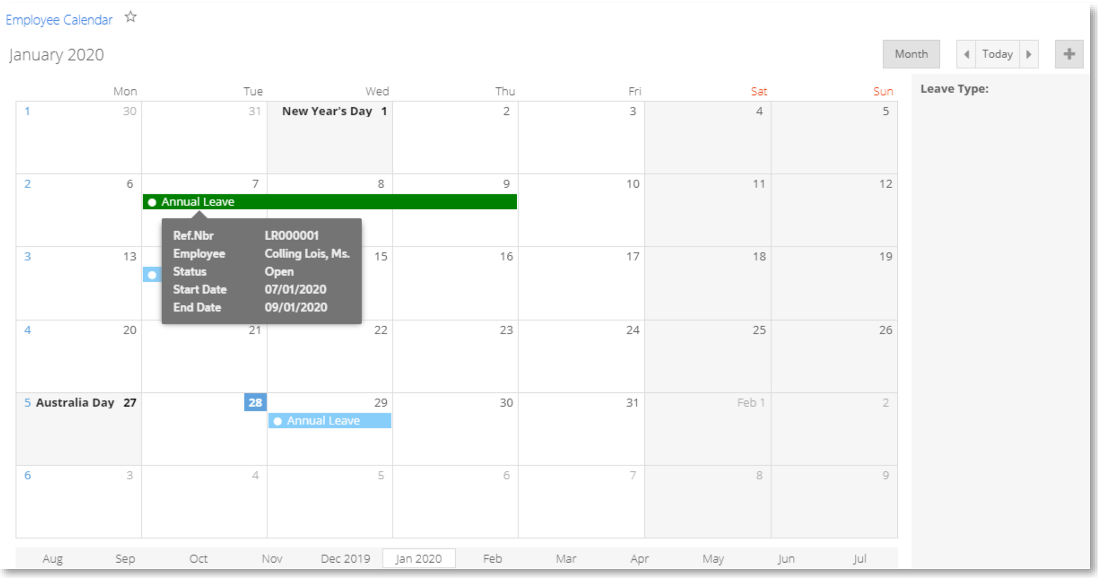
The self-service features include two calendar screens:

- The Employee Calendar (MPES4001), which lets an employee view a schedule of their own leave requests and enter new requests.
- The Team Calendar (MPES4003), which lets a manager view the leave schedules for the employees that they manage.

Note: The calendar screens are not available on the MYOB Advanced mobile app.

Employee Calendar

The Employee Calendar screen shows a calendar month, with any leave requests made by the employee highlighted. Hovering the mouse over a leave request shows additional details in a popup.



Employees can double-click on a day to request leave on that day, or click and drag across a range of days to request leave for the range. See "Making Leave Requests" on page 12 for more information on the process of making and submitting leave requests.

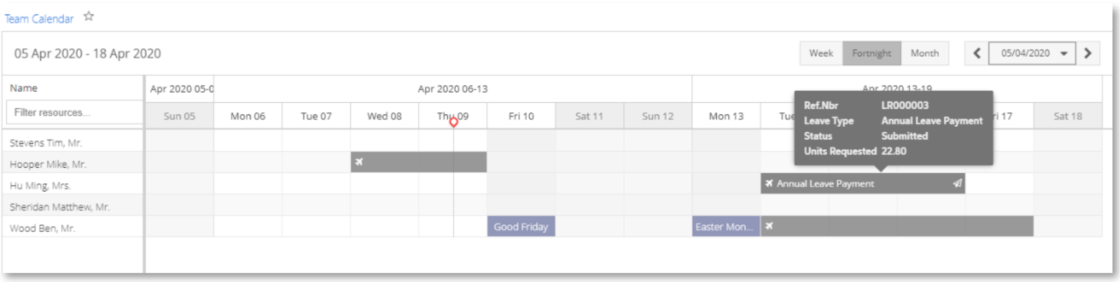
Team Calendar

The Team Calendar screen contains a calendar that shows the leave requests relating to the employees that are managed by the logged in user. Employees are selected for display on the calendar in one of two ways:

- The calendar displays all employees who are below the same user on the Company Tree screen (EP204061).
- The calendar displays all employees who have the same user selected for their **Reports to** field on the Employees screen (EP203000).

The **Team Scheduler Employees Source** option on the Self Service Preferences screen (MPPP1010) determines which of these methods will be used.

As with the Employee Calendar screen, employees' leave requests are highlighted on the calendar, with additional details available when the mouse is hovered over a leave request. The Team Calendar includes extra controls for viewing a week, fortnight or month, and for selecting a specific date to display (or just "Today").

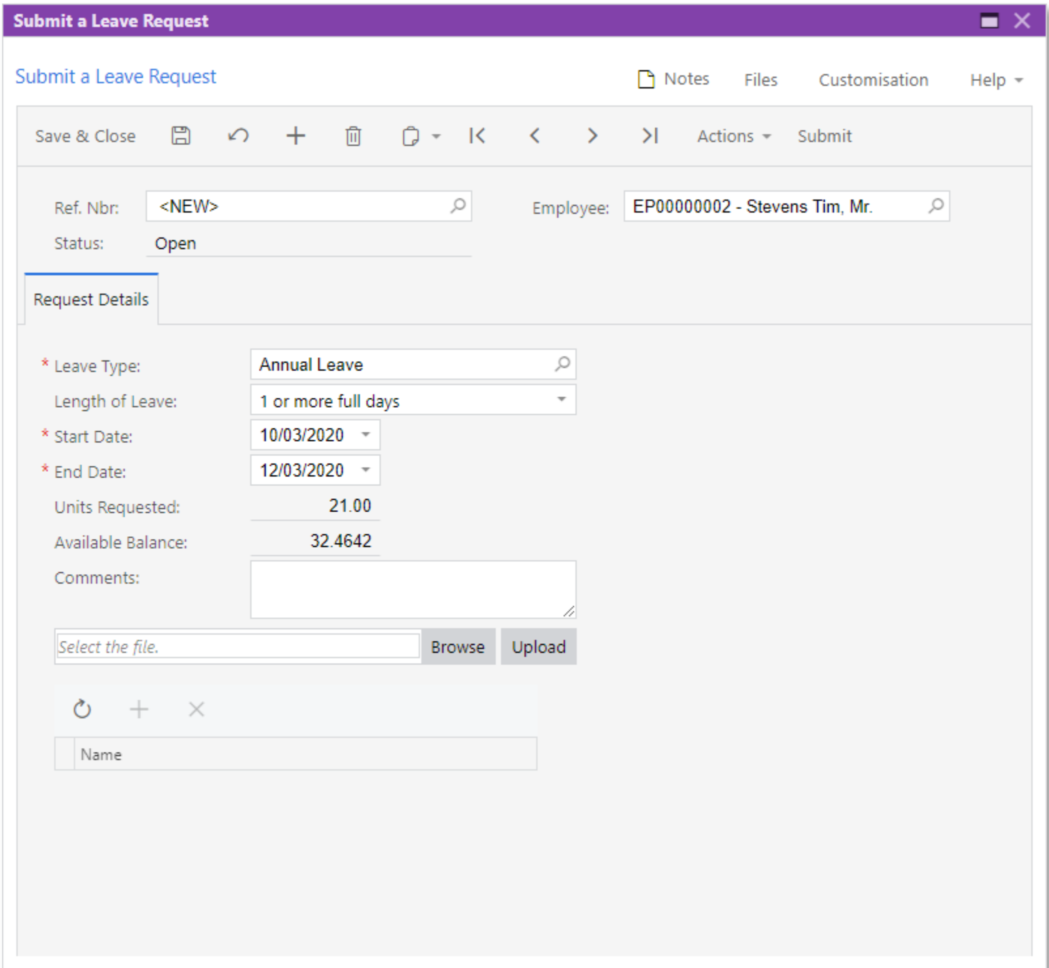


Note: When viewed by a manager, the Team Calendar shows all details of all team members' leave requests. When viewed by a team member, only the details of that member's leave requests are shown—other team members' requests appear on the calendar without details. In the screenshot above, Ming Hu is logged in, so only the details of her leave request are shown.

Making Leave Requests

Employees can make a new leave request using the Submit a Leave Request screen (MPES3020). Managers can also use this screen to make leave requests for the employees they manage. The screen can be accessed in several ways:

- On the Employee Calendar screen, by double-clicking on a day, or clicking and dragging across a range of days (see page 10).
- On the Leave Balances screen, by clicking one of the **Leave Request** links in the main table (see page 9).
- On the Projected Leave Balance screen, by clicking the **New Leave Request** toolbar button (see page 9).
- On the Leave Requests screen, by clicking the **+** toolbar button (see page 13).



Using this screen, a user (employee or manager) can enter all of the details for the leave request, including the leave type, and leave start and end dates. The user can also attach documents to the request (this may be required, depending on the leave type's configuration—see "Setting up Leave Types" on page 5).

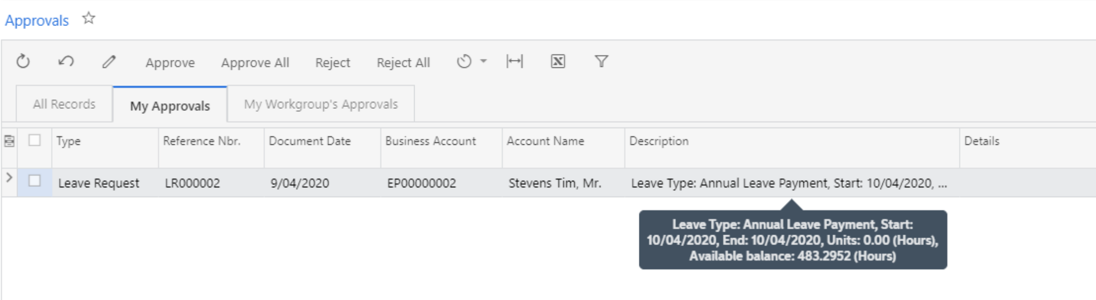
Once the user clicks **Submit**, the request is submitted for approval, as per the Approval Map specified for leave requests (see "Self Service Preferences" on page 4). If the user is an employee, an email notification is sent to their manager as soon as the request is submitted.

Note: If no approval map has been specified (see page 4), the request is approved automatically as soon as it is submitted.

Reviewing Leave Requests

Managers

The approvals process uses the built-in approval features of MYOB Advanced. Managers can see leave requests in need of approval on the Approvals screen (EP503010)—this is the same screen that time and expense approvals appear on, making all necessary items available for review in on place.



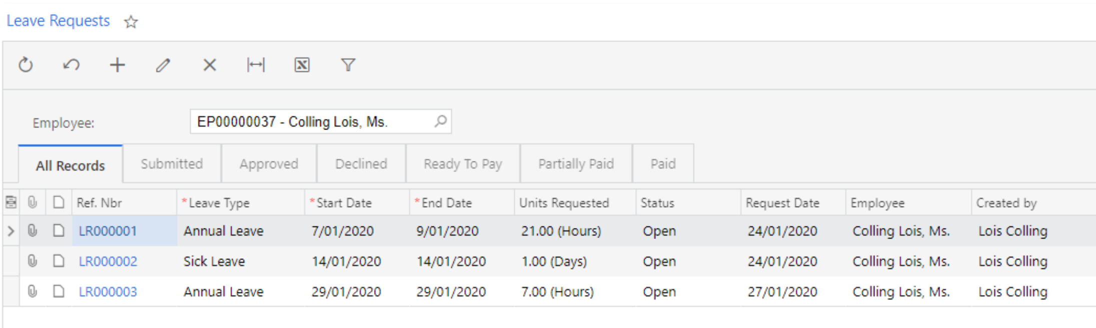
A manager can use the toolbar buttons on the Approvals screen to approve or reject (decline) leave requests. Hovering the mouse over the **Description** column shows the leave request's details in a popup. Double-clicking on a leave request row opens the Submit a Leave Request window (see page 12). On this window, the manager can review more details of the request, with options in the **Actions** dropdown to approve or decline.

Managers can also view, approve and decline requests from their team on the Team Calendar screen (see page 11). Right-clicking on a request gives **Approve** and **Decline** options.

Employees

Once a leave request has been approved or declined, an email notification will be sent to the employee, using the Leave Request Approved and Leave Request Declined notifications (see page 4).

Employees can use the Leave Requests screen (MPES3021) online or via the MYOB Advanced mobile app to see the status of any leave requests they've made:



They can also review request statuses on the Employee Calendar screen (see page 10).

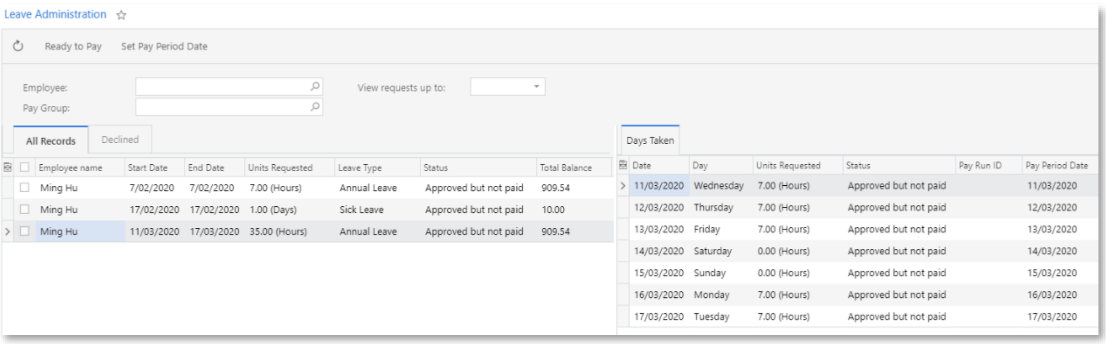
Leave Request Statuses

A leave request can be in one of the following statuses:

- **Open** – The request has not yet been submitted for approval.
- **Submitted** – The request has been submitted for approval. It can still be edited or deleted at this stage.
- **Approved but not paid** – The request has been approved, but has not yet been processed as part of a pay run. The request can be edited, which will return it to the Open status.
- **Declined** – The request has been declined and will not be processed further.
- **Ready To Pay** – The request has been marked as ready for inclusion in a pay run (or pay runs, if the amount of leave spans more than one pay period). The request can be edited, which will return it to the Open status.
- **Processing** – The request has been added to a pay run, which is currently being processed. The request can no longer be edited or cancelled.
- **Cancelled** – The request has been cancelled and will not be processed further.
- **Partially Paid** – If the requested leave spans more than one pay run, this status indicates that one or more of those pay runs has been processed, but there is still some of the request that has not yet been paid.
- **Paid** – All days of the request have been paid, across one or more pay runs.

Preparing Leave Requests

Submitted leave requests appear on the Leave Administration screen in the Payroll module (MPPP5040):



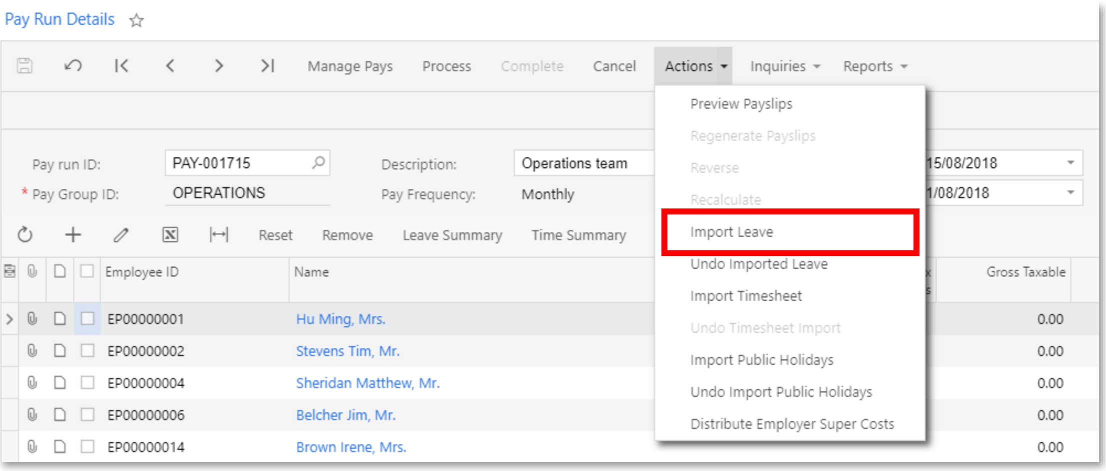
> **Note:** The Leave Administration screen is only available if the Employee Self Service feature has been enabled.

A payroll administrator can select leave requests on this screen and use the toolbar buttons to set them as ready to include in a pay. If the administrator is included in the approval map for leave requests (see page 4), they will also have been able to approve or decline them before they are included in a pay.

Leave requests in the "Ready to Pay" status will be added to pay runs based on the dates that leave was taken on. The **Set Pay Period Date** button allows you to specify a new date for the selected leave request(s). For instance, if a pay run that covers the date of the request has already been run, you can include the leave request in a future pay run by setting a new Pay Period Date.

Paying Leave

To add approved leave to a pay run, click the **Import Leave** action on the Pay Run Details screen (MPPP3120):



Clicking this action imports any leave requests for employees in the pay run that fall within the pay period’s start and end dates (partially or in full) and have the “Ready to Pay” status.

> **Note:** If a leave request spans multiple pay periods, only the portion of the request that falls within the pay’s start and end dates will be imported. After the pay is completed, the request’s status will be “Partially Paid”—see page 14.

Once leave requests are added to a pay, leave pay items for the request appear on the Employee’s Current Pay screen (MPPP3130) for the affected employees.

Leave that has been imported into a pay can be viewed and managed in the same way that leave has been managed in previous releases: details of the leave appear in the Days Taken window (opened from the Employee’s Current Pay screen), and in the Leave Summary (click **Leave Summary** on the Employee’s Current Pay or Pay Run Details screen).

As leave is imported into a pay and processed, the status of the original leave request will be updated. The employee who made the request can check on its status using the Leave Requests screen in the Self Service module (see “Reviewing Leave Requests” on page 13).

Undoing Leave Imports

If you need to undo a leave import, you can click the **Undo Timesheet Import** action on the Pay Run Details screen to remove all data that was added to the pay run by the import process. You can also undo individual employees’ timesheet imports by selecting them and clicking the **Reset** button to reset their pay to the Standard Pay.