

**IMS PAYROLL**

**online express**

# **IMS Online Express**

## **Getting Started Administrator Guide**

POWERED BY

The logo consists of five dots of varying sizes and colors (blue and grey) arranged in a semi-circular pattern above the text.  
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## Create your IMS Online database

Refer to the '[Installing IMS Online](#)' guide on the IMS Payroll website.



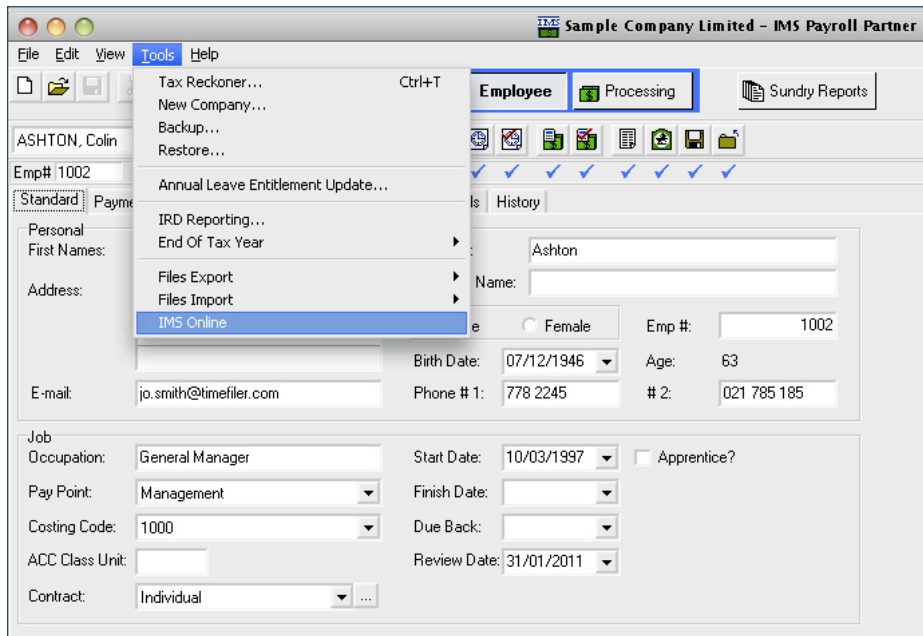
You need to successfully create your IMS Online database from within IMS Payroll before carrying on with the rest of the steps in this document.  
Please contact IMS Payroll on 06 876 8959 if you experience any issues.

There are several key items to ensure are set up in IMS Payroll before creating your IMS Online database:

- Ensure all employees have a unique employee number
- Attach employees to a public holiday group
- Assign manager details against pay points
- Attach employees to a contract code, if required
- Fill in payroll administrator e-mail details

## Log into IMS Online

Log into IMS Online via the IMS Online menu item on the Tools toolbar within IMS Payroll:



Run an IMS Online Update if required to ensure your database is up to date.

The following tasks need to be completed to ensure IMS Online Express will run as expected:

- Review Leave Request reasons
- Review Leave without Pay payment code
- Review Time in Lieu payment code
- Set up Manager KPI report settings
- Modify Leave Request form (displayed balances)
- Review My Details settings
- Check employee rostered hours of work

These tasks are explained in detail in the following sections.

## **IMS Online Express configuration tasks**

### **Review Leave Request reasons**

By default, the following Leave Request reasons are available for selection in IMS Online Express:


- Alternative Holiday
- Annual Leave
- Bereavement Leave
- Company Leave
- Shift Leave
- Sick Leave
- Service Leave

To modify the Leave Request reasons that are available to employees and managers, please take the following steps:

1. Navigate to the Configuration tab page in IMS Online Express; you should now be on the Business Rules | Leave Requests tab page:

**IMS Online**

My leave | My payslips | My documents | Actions | Master files | Configuration | My password

**Configuration** 

**Business rules**

- Configure Leave request form
- Configure My details
- Configure Excessive annual leave
- Configure Leave liability (units) KP

**Business rules configuration**

Leave requests | Email

Select the Reasons users can choose from on Leave Requests

\* Request reasons : 7 selected ▼

Select non-standard payments

Leave without Pay : ▼

2. Click on the 'Request Reasons' dropdown arrow. Select or unselect Leave Request reasons as required.

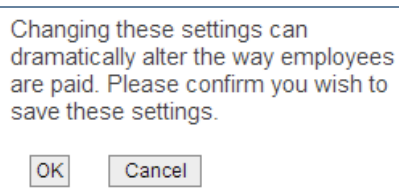


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Please refer to the Time in Lieu section if you select the Time in Lieu Leave Request reason code.

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3. Press **Save**. The following window will be displayed:



Press OK.



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All users will see the same Leave Request reasons.

It is possible to show different Leave Request reasons to different employee groups in IMS Online Plus and Max; but this is not possible in IMS Online Express.

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## Leave without Pay

Two factors need to be checked in relation to Leave without Pay:

- Does a Leave without Pay payment code exist in IMS Payroll?
- If so, what is the name of it?

### Leave without Pay code – does one exist?

Payments are created for import into IMS Payroll for the Leave Requests that exist for the current pay period.

In IMS Online Express, employees will not be allowed to go into a negative leave balance for any leave type that holds a balance in IMS Payroll.

If a Leave without Pay payment code exists in IMS Payroll, then the Leave Request will be paid as 'Leave without Pay'; otherwise, no transaction will be created (although for salaried employees, a salaried reversal will be created for any leave that does not result in a payment).

Since Leave without Pay is not a standard leave type in IMS Payroll, such a code may not exist in the database. If you would like to pay leave for which there is insufficient leave balance as Leave without Pay, then please take the following steps:

1. **Create** a Leave without Pay payment code in IMS Payroll if it does not already exist (please contact IMS Payroll Support on 06 876 8959 if you require assistance with this).

You will then need to update IMS Online to bring the new payment code across into the system.



Take note of the naming issue for Leave without Pay in the following section (page 7).

2. **Assign** your Leave without Pay payment code in IMS Online (this step is required even if the Leave without Pay code already existed in IMS Payroll).

Navigate to the Configuration tab page in IMS Online Express; you should now be on the Business Rules | Leave Requests tab page:

IMS Online

My leave | My payslips | My documents | Actions | Master files | Configuration | My password

**Configuration**

Business rules

Configure Leave request form  
Configure My details  
Configure Excessive annual leave  
Configure Leave liability (units) KP

**Business rules configuration**

Leave requests | Email

Select the Reasons users can choose from on Leave Requests

\* Request reasons : 7 selected

Select non-standard payments

Leave without Pay :

In the Leave without Pay field, select your Leave without Pay payment code. You can either start typing the code or description, or use the drop-down arrow to select the payment.



Please ensure you **ONLY** select Leave without Pay in this field.

If you select another payment code, for example, Ordinary Hours – this will result in leave payments that cannot be paid due to an insufficient leave balance being paid as Ordinary Hours rather than a leave without pay payment.

Press **Save**. The following window will be displayed:

Changing these settings can dramatically alter the way employees are paid. Please confirm you wish to save these settings.

OK Cancel

Press **OK**.

## Leave without Pay – check description

The leave types shown in 'My leave history' and 'Team's leave history' is based on the payment description as stored in IMS Payroll.

Since Leave without Pay is not a standard payment type in IMS Payroll, it is possible that your payment code is not named exactly as 'Leave without Pay'.

If your LWOP payment type is named, for example, 'Unpaid Leave', it will not show as Leave without Pay (colour coded purple) in leave history. Instead, it will show as 'Other Leave' (colour coded pale pink):

	ACC 1st Week
	Annual Leave Taken
	Alternative Holiday
	Bereavement Leave
	Company Leave
	Leave Without Pay
	Service Leave
	Shift Leave
	Sick Leave
	Statutory Holiday
	Time in Lieu
	Other

To ensure Leave without Pay actually displays as 'Leave without Pay' in the leave history calendar screens, please ensure the description in IMS Payroll is entered exactly as 'Leave without Pay'.



Since Leave without Pay is not a standard payment type in IMS Payroll, it is not available as a Leave Request reason in IMS Online Express.

This can however be made available in IMS Online Plus and Max.

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## Time in Lieu

Two factors need to be checked in relation to Time in Lieu:

- Does a Time in Lieu payment code exist in IMS Payroll?
- If so, what is the name of it?

### Time in Lieu code – does one exist?



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By default, Time in Lieu is not an available Leave Request reason type. If it is ticked in the Leave Requests selection box, then please ensure a payment code is set up in IMS Payroll as per the following requirements to ensure it is paid correctly.

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Payments are created for import into IMS Payroll for the Leave Requests that exist for the current pay period.

Since Time in Lieu is not a standard leave type in IMS Payroll, such a code may not exist in the database. If you would like employees to apply for Time in Lieu online, then please take the following steps:

1. **Create** a Time in Lieu payment code in IMS Payroll if it does not already exist (please contact IMS Payroll Support on 06 876 8959 if you require assistance with this).

You will then need to update IMS Online to bring the new payment code across into the system.



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Take note of the naming issue for Time in Lieu in the following section (page 9).

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2. Tick the Time in Lieu Leave Request reason code (as per page 4 of this document).

## Time in Lieu – check description

The leave types shown in 'My leave history' and 'Team's leave history' is based on the payment description as stored in IMS Payroll.

Since Time in Lieu is not a standard payment type in IMS Payroll, it is possible that your payment code is not named exactly as 'Time in Lieu'.

If your Time in Lieu payment type is named, for example, 'Time in Lieu (paid)', it will not show as Time in Lieu (colour coded dark pink) in leave history. Instead, it will show as 'Other Leave' (colour coded pale pink):

	ACC 1st Week
	Annual Leave Taken
	Alternative Holiday
	Bereavement Leave
	Company Leave
	Leave Without Pay
	Service Leave
	Shift Leave
	Sick Leave
	Statutory Holiday
	Time in Lieu
	Other

To ensure Time in Lieu actually displays as 'Time in Lieu' in the leave history calendar screens, please ensure the description in IMS Payroll is entered exactly as 'Time in Lieu'.



Time in Lieu accrual is not available in IMS Online Express.

These may however be made available in IMS Online Plus and Max.

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## Configure Manager KPI reports

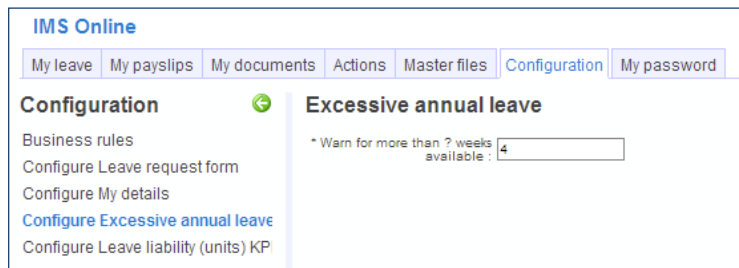
Administrators need to configure some Manager KPI reports to ensure they are displaying correct information to managers.

### Excessive Annual Leave

Emp no.	Name	AL balance	Units	Hours per week	Days per week	Estimated AL balance (weeks)
<b>Factory</b>						
1023	ABBOTT, Marie	71.00	Hours	37.50		1.89
1008	HAMILTON, Jenny	12.00	Days		5.00	2.40
1014	HAYES, John	15.00	Days		5.00	3.00
1016	MORGAN, Hamish	19.00	Days		5.00	3.80
1005	REDSHAW, Kevin	15.00	Days		5.00	3.00
1000	SHAPLAND, Karen	65.35	Hours	20.00		3.27
1019	SKJODDER, Kate	110.23	Hours	40.00		2.76
1007	WEBLEY, Janet	16.00	Days		5.00	3.20

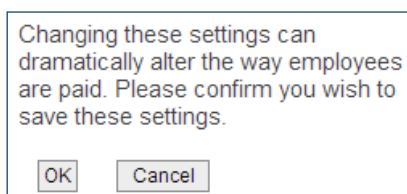
The Excessive Annual Leave report highlights in red employees who have more than xx weeks Annual Leave. By default, this is set as four weeks, however you may wish to change this to another value. For example, the report above is set to three weeks.

1. **Navigate** to the Configuration tab page in IMS Online Express; and then click on the 'Configure excessive annual leave' tab page:



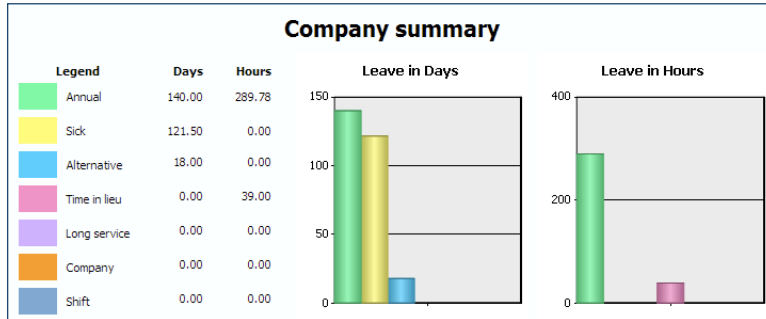
In the 'Warn for more than ? weeks available' field, enter in the number of weeks for the excessive leave warning.

2. Press **Save**. The following window will be displayed:



Press **OK**.

## Leave Liability (units)



The Leave Liability report displays leave balances in hours and days. The Administrator has control over which leave types are displayed on the report for managers.

1. **Navigate** to the Configuration tab page in IMS Online Express; and then click on the 'Configure excessive annual leave' tab page:

IMS Online - Sample Company Limited Logged in as : TIMEFILER

My leave | My payslips | My documents | Actions | Master files | Configuration | My password

**Configuration** Configure Leave Liability (units) KPI

Business rules  
 Configure Leave request form  
 Configure My details  
 Configure Excessive annual leave KPI  
 Configure Leave liability (units) KPI

**Leave - Annual**

Include Annual Leave Outstanding :       Include Annual Leave Accrued :       Include Annual Leave Paid In Advance :

**Leave - Sick**

Show Sick Leave :

**Leave - Other**

Show Alternative Holiday :       Show Time In Lieu :       Show Company Leave :   
 Include Company Leave Accrued :       Show Long Service Leave :       Show Shift Leave :   
 Include Shift Leave Accrued :

**Annual Leave** – tick all boxes to show total available Annual Leave (as per default), or:

- Tick just Annual Leave Outstanding to display outstanding balance only
- Tick just Annual Leave Accrued to display accrued balance only
- Tick just Annual Leave Outstanding and Accrued to display these two balances only (leave paid in advance won't be included)

**Sick Leave** – tick the box to show Sick Leave (as per default), or:

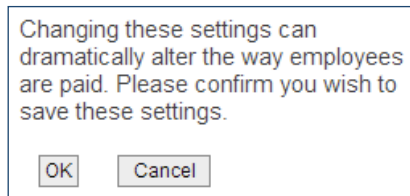
- Untick the box to exclude Sick Leave from the report

**Other Leave** – tick all boxes to show all other leave (as per default), or:

- Untick the Alternative Holiday box to exclude Alternative Holiday from the report

- Untick the Time in Lieu box to exclude Time in Lieu from the report
- Untick the Company Leave box to exclude Company Leave from the report
- Untick the Company Leave Accrued box to exclude Company Leave Accrued from the report
- Untick the Long Service Leave box to exclude Long Service Leave from the report
- Untick the Shift Leave box to exclude Shift Leave from the report
- Untick the Shift Leave Accrued box to exclude Shift Leave Accrued from the report

2. Press **Save**. The following window will be displayed:



Press OK.



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Note that Time in Lieu will only display correctly if it follows the naming conventions as described on page 9 of this document.

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## Review Leave Request form (displayed balances)

By default, the following leave balances are displayed to employees and managers on their Leave Request form:

**Leave request** Abbott, Jane (1022)

[Create](#)

Leave balances

AL Outstanding	AL Accrued	AL Total	AL Next Due Date	Alt Holiday	
0 Hours	43.2 Hours	43.2 Hours	13/09/2011	0 Days	0 Hours

Date	Request type	Partial day?	Hours	Notes	Roster
Mon 27/9					
Tue 28/9					
Wed 29/9					
Thu 30/9					
Fri 1/10					
Sat 2/10					
Sun 3/10					

It is possible to show other balance types if required, or if preferred, hide the default balance types.

1. **Navigate** to the Configuration tab page in IMS Online Express; and then click on the 'Configure Leave Request form' tab page:

IMS Online - Sample Company Limited Logged in as: TIMEFILER (as an Administrator)

**IMS PAYROLL PARTNER**  
online express

[My leave](#) | [My payslips](#) | [My documents](#) | [Actions](#) | [Master files](#) | **Configuration** | [My password](#)

[Logout](#)

**Configuration**

Business rules  
[Configure Leave request form](#)  
 Configure My details  
 Configure Excessive annual leave KPI  
 Configure Leave liability (units) KPI

**Configure leave request form**

Leave balance type 1: <input type="text" value="AL Outstanding (standard display)"/>	Leave balance name 1: <input type="text" value="AL Outstanding"/>	Leave balance type 2: <input type="text" value="AL Accrued (standard display)"/>
Leave balance name 2: <input type="text" value="AL Accrued"/>	Leave balance type 3: <input type="text" value="AL Balance (standard display)"/>	Leave balance name 3: <input type="text" value="AL Total"/>
Leave balance type 4: <input type="text" value="AL Next Due Date"/>	Leave balance name 4: <input type="text" value="AL Next Due Date"/>	Leave balance type 5: <input type="text" value="AHOL Balance (standard display)"/>
Leave balance name 5: <input type="text" value="Alt Holiday"/>	Leave balance type 6: <input type="text" value="TIL Balance (standard display)"/>	Leave balance name 6: <input type="text"/>
Leave balance type 7: <input type="text"/>	Leave balance name 7: <input type="text"/>	Leave balance type 8: <input type="text"/>
Leave balance name 8: <input type="text"/>	Leave balance type 9: <input type="text"/>	Leave balance name 9: <input type="text"/>

Up to nine fields may be displayed on the Leave Request form.

For each leave balance type, there are two fields; a “type” and a “name”.

The “type” field holds the leave balance type, for example, Annual Leave, Sick Leave etc. The “name” field holds the display names that will be seen on the Leave Request form.



Please ensure the “type” and “name” field combinations are aligned. For example, make sure you select a “name” that corresponds with the leave balance “type”.

2. Press **Save**. The following window will be displayed:

Changing these settings can dramatically alter the way employees are paid. Please confirm you wish to save these settings.

Press OK.



All users will see the same Leave Request form.

It is possible to show different leave balance information to different employee groups in IMS Online Plus and Max; but this is not possible in IMS Online Express.

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## Review My Details settings

There are default fields that are displayed to employees and managers when they click on the My Details tab page:

**My details**

Print Notify Refresh

**ABBOTT, Marie**

First Names: Marie	Surname: Abbott
Preferred Name:	Employee Number: 1023
Address:	Gender: Female
	Birth Date:
	Email Address:

Phone Number:	Mobile Number:
Occupation: Adviser	Start Date: 29/07/2010
Tax Code: M	IRD Number: 043-432-974

Pay Frequency: Fortnightly	Waged Hourly Rate: \$16.00
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Net Pay Payment Method: Bank

Bank Account: 06-0645-0169831-00	
Bank Account Reference:	
Bank Account Particulars:	
Bank Account Code:	

**Leave**

Annual Leave Outstanding: 0.00 Hours	
Annual Leave Accrued: 86.00 Hours	

It is possible to show other fields if required, or if preferred, hide the default My Details fields.

- Navigate** to the Configuration tab page in IMS Online Express; and then click on the 'Configure My Details' tab page:

IMS Online - Sample Company Limited Logged in as: TIMEFILER (as)

My leave My payslips My documents Actions Master files Configuration My password

**Configuration**

Business rules  
 Configure Leave request form  
[Configure My details](#)  
 Configure Excessive annual leave KPI  
 Configure Leave liability (units) KPI

**Configure My details**

**Leave - Annual**

Annual Leave Outstanding? : <input checked="" type="checkbox"/>	Annual Leave Accrued? : <input checked="" type="checkbox"/>	Annual Leave Paid In Advance? : <input checked="" type="checkbox"/>
Annual Leave Balance? : <input checked="" type="checkbox"/>	Annual Leave Anniversary Date? : <input checked="" type="checkbox"/>	

**Leave - Sick**

Sick Leave Available? : <input checked="" type="checkbox"/>	Sick Leave Anniversary Date? : <input checked="" type="checkbox"/>
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**Leave - Other (note Service and Shift leave are also dependent on the options being ticked in IMS Payroll Partner)**

Alternative Holiday : <input checked="" type="checkbox"/>	Time In Lieu Available? : <input checked="" type="checkbox"/>	Service Leave Available? : <input checked="" type="checkbox"/>
Company Leave Available? : <input checked="" type="checkbox"/>	Company Leave Accruals? : <input checked="" type="checkbox"/>	Shift Leave Available? : <input checked="" type="checkbox"/>
Shift Leave Accruals? : <input checked="" type="checkbox"/>		

**Superannuation types (note Compliant Fund and Employer Superannuation are also dependent on the options being ticked in IMS Payroll Partner)**

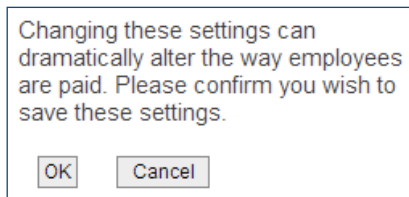
KiwiSaver Information? : <input checked="" type="checkbox"/>	Compliant Fund Information? : <input checked="" type="checkbox"/>	Employer Superannuation Information? : <input checked="" type="checkbox"/>
--	---	--

By default, all fields are ticked to be displayed in My Details. If any



fields are to be hidden, untick the relevant fields.

2. Press **Save**. The following window will be displayed:



Press OK.

## Check employee rostered hours

### What is the impact of the roster in IMS Online Express?

- Employees will only be paid for leave that has been applied for on a rostered day of work.
- Let's say the employee is rostered to work Monday to Friday, and applies for leave spanning from Monday for two weeks until the following Friday.
- Since the employee is only rostered to work Monday to Friday, leave days will not be generated for Saturday and Sunday within the two week leave request.
- If the employee applies for leave that does not include any rostered days, warnings will be generated to advise the leave request will not result in a payment.



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IMS Online Express has a go at working out the employee's roster based on Standard Weekly and Daily Hours in IMS Payroll.

This standard logic may not apply to all employees, so it is important to check derived employee rosters, and update if necessary.

**You only need to assign a roster template, or an individual roster to an employee IF the derived roster generated from IMS Payroll is not correct.**

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Please refer to the '**Modifying employee rosters**' guide on the Documentation page on the IMS Online pages of the IMS Payroll website for further information.