

IMS Online Express - Manager User Guide

Logging into IMS Online Express

Your Payroll Administrator will advise the web address for logging into IMS Online Express.



You can log into IMS Online from anywhere where there is an internet connection.



Use the links on the login page to download the app for your smartphone

Welcome to IMS Online

USERNAME

PASSWORD
| _____

LOG IN



[Privacy Policy](#) | [Terms of use](#)

Login Details

Your login name is your IMS Payroll employee number.

The first time you log into IMS Online Express, your password is your IRD Number (e.g. 012-345-678 is entered as 012345678). If you don't know your IRD Number, please contact your Payroll Department.

After you successfully logged in for the first time, you will be prompted to change your password. Make sure the password is secure, and remember, it is case-sensitive.



*If you forget your password, please contact your Payroll Department so that it can be reset.
You will be logged out after 9 unsuccessful attempts.*

You can change your password at any time when logged into IMS Online Express. Click on the 'My Password' tab and enter new password details.

My leaveMy timeMy rosterMy payslipsMy documentsMy detailsMy password

Change my password

Current Password New Password * Confirm Password *

IMS Online Express Screens

The following tab pages are available in IMS Online Express:

My leave	My payslips	My documents	My details	My password
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My leave Leave requests August 2018

Team's leave requests
[◀ Prev Month](#)
[Next Month ▶](#)
[Refresh](#)
[Show me](#)
[Print](#)
[Show Legend](#)

Employee	W/1	T/2	F/3	S/4	S/5	M/6	T/7	W/8	T/9	F/10	S/11	S/12	M/13	T/14	W/15	T/16	F/17	S/18	S/19	M/20	T/21	W/22	T/23	F/24	S/25	S/26	M/27	T/28	W/29	T/30	F/31
1002 ASHTON, Colin 69.5 Days	8	8	8			8	8	8	8	8			8	8	8	8	8			AL	AL	AL	AL	AL			8	8	8	8	8
1012 BLOXHAM, Peter 166.83 Hours	8	8	8			8	8	8	8	8			8	8	8	8	8			8	8	8	8	8			8	8	8	8	8
1015 CLARK, Andrea 363.4 Hours	8	8	8			8	8	8	8	8			8	8	8	8	8			8	8	8	8	8			8	8	8	8	8
1017 FLOWERS, Andrew 71 Days	7.5	7.5	7.5			7.5	7.5	7.5	7.5	7.5			7.5	7.5	7.5	7.5	7.5			7.5	7.5	7.5	7.5	7.5			7.5	7.5	7.5	7.5	7.5
1020 GARDINER, Anne 0 Hours	4	4	4			4	4	4	4	4			4	4	4	4	4			4	4	4	4	4			4	4	4	4	4
1008 HAMILTON, Jennifer 86.5 Days	7.5	7.5	7.5			7.5	7.5	7.5	7.5	7.5			7.5	7.5	7.5	7.5	7.5			7.5	7.5	7.5	7.5	7.5			7.5	7.5	7.5	7.5	7.5
1014 HAYES, John 64.5 Days	8	8	8			SL	8	8	8	8			8	8	8	8	8			8	8	8	8	8			AL	AL	8	8	8

My Leave	My Payslips	My Documents	My Details	My Password
<ul style="list-style-type: none"> Apply for leave online Enter leave requests on behalf of your employees View past, current and future leave requests, for yourself, and for your team Check the status of leave requests for yourself, and for your team (approved / not approved) View scheduled days of work for yourself, and for your team View actual leave history payments for yourself, and for your team 	View payslips online	View documents online (for ex. Company policies, newsletters)	Review personal payroll details. Notify payroll department if changes are required.	Change password details



If you cannot see all the pages on the My Leave tab as shown above, you are not set up in IMS Payroll as a Manager. Please contact your Payroll Department for further information

Leave Requests

The following functionality is available for Managers on the **Team's Leave Requests** tab page:

- A monthly calendar showing Leave Requests for the Manager and their team
- Create Leave Requests on behalf of employees
- Apply for leave online
- Check the status of Leave Requests (approved / not approved)
- Approve or decline employee Leave Requests
- View past, current and future Leave Requests
- View scheduled days of work

The following functionality is available for Managers on the **My Leave Requests** tab page:

- An annual calendar showing Leave Requests for Manager only
- Apply for own leave online
- View past, current and future Leave Requests
- Check the status of Leave Requests (approved / not approved)
- View scheduled days of work

E-mail alerts

E-mails will be generated from IMS Online Express when the following actions are undertaken:

<p>You submit a Leave Request</p> <ul style="list-style-type: none"> An e-mail will be sent to your Manager (and copied to your Assistant Manager if you have one) advising them of your leave request If you add a comment, this will be included in the e-mail text 	<p>You withdraw a Leave Request</p> <ul style="list-style-type: none"> An e-mail will be sent to your Manager (and copied to your Assistant Manager if you have one) advising them you have withdrawn your leave request Your comment will be included in the e-mail text
<p>You submit a Leave Request on behalf of an employee</p> <ul style="list-style-type: none"> An e-mail will be sent to the employee advising them you have created a Leave Request on their behalf If you add a comment, this will be included in the e-mail text 	<p>You approve / decline an employee's Leave Request</p> <ul style="list-style-type: none"> An e-mail will be sent to the employee advising them you have approved/declined their Leave Request If declined, your comment will be included in the e-mail text



You will only receive an email if you have an email address set up in IMS Payroll (likewise, your manager/ employee will only receive an email if they have an email address set up as well). Check that your email address stored correctly by checking the **My Details** tab.

My details
[Print](#) [Notify](#) [Refresh](#)

CLARK, Andrea

<p>First Names: Andrea Preferred Name: Andy Address: 1234 Te Awa Road RD7 Best Town</p>	<p>Surname: Clark Employee Number: 1015 Gender: Female Birth Date: Email Address: ←</p>
<p>Phone Number: 02 369 8524 Occupation: Admin Assistant Tax Code: M</p>	<p>Mobile Number: Start Date: 2/07/2007 IRD Number: 023-489-643</p>

Apply for

Leave

The following tab pages are available in the **My Leave Requests** tab:

To create a leave request, click **My leave requests** on the **My Leave** tab page:

[My leave](#) | [My payslips](#) | [My documents](#) | [My details](#) | [My password](#)

My leave ↶

Team's leave requests

My leave requests ←

Team's leave history

My leave history

Leave planner 2018

⏪ Prev Year | Next Year ⏩ | [Refresh](#)

Month	M	T	W	T	F	S	S	M
January	8	8	8	8	8			8
February				8	8			8



Your leave request may also be created from the **Team's Leave Request** tab page

The annual leave planner screen will display. Click on the date that you wish to take as leave and then click the **Create** button to create the Leave Request.

My leave | My payslips | My documents | My details | My password

My leave

My leave requests
My leave history

Leave planner 2018

◀ Prev Year ▶ Next Year ▶ Refresh Show me Show Legend

Month	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S
January	8	8	8	8	8			8	8	8	8	8			8	8	8	8	8		
February								8	8	8	8	8			8	8	8	8	8		
March								8	8	8	8	8			8	8	8	8	8		
April								8	SL	SL	8	8			AL	AL	AL	AL	AL		
May								8	8	8	8	8			8	8	8	8	8		
June								8	8	8	8	8			8	8	8	8	8		
July								8	8	8	8	8			8	8	8	8	8		
August								8	8	8	8	8			8	8	8	8	8		
September								8	8	8	8	8			8	8	8	8	8		
October	8	8	8	8	8			8	8	8	8	8			8	AL	AL	AL	AL		
November								8	8	8	8	8			8	8	8	8	8		
December								8	8	8	8	8			AL	8	8	8	8		

Leave request Bloxham, Peter (1012)

Create

Leave balances

AL Outstanding	AL Accrued	AL Total	AL Next Due Date	Alt Holiday	TIL	Accrued to
102.83 Hours	64 Hours	166.83 Hours	2/04/2019	2 Days	2 Hours	19/08/2018

Date	Request type	Partial day?	Hours	Notes	Roster
Mon 1/1			8		8
Tue 2/1			8		8



The leave request window will display.

Select leave request details

Reason *

Start Date *
 Monday, 1 Jan 2018

End Date *
 Monday, 1 Jan 2018

Comment

Document/Photo

Partial Day Leave Request

By default, it is assumed that a leave request is for an entire day, based on standard hours for the day. However, from time to time, you may wish to apply for a partial day, for example, a half day Annual Leave.

After completing the leave request details, instead of clicking **Submit**, click the **Part-day details** button instead:

Select leave request details

Reason *

Start Date *
 Monday, 1 Jan 2018

End Date *
 Monday, 1 Jan 2018

Comment

Document/Photo



The following screen will display:

Leave balances

AL Outstanding	AL Accrued	AL Total	AL Next Due Date	Alt Holiday	TIL	Accrued to	AL Current + projected - approved - not approved = projected balance
102.83 Hours	64 Hours	166.83 Hours	2/04/2019	2 Days	2 Hours	19/08/2018	166.83 + 11.1 - 0 - 88 = 89.93 Hours

Date	Request type	Partial day?	Hours	Notes	Roster
Thu 13/9	Annual leave	<input type="checkbox"/>			8
					8

Make sure to put a tick in the **Partial day** box and complete the number of hours of leave taken for the partial day. Click **Submit** to submit the leave request to your Manager or click **Save** to submit the leave request on a later date.



Upon clicking Submit, an email will be sent to your Manager. You will receive an email when your Manager has approved / declined the leave request.

A leave request can be withdrawn. To withdraw a leave request, click **My leave requests** on the **My leave** tab page, and then click on the relevant leave request. Click the **Withdraw** button. Add a comment to explain why you are withdrawing the leave request, and then click **OK**.



You will not be able to withdraw a leave request unless a comment is added. An email will be sent to your Manager notifying them that the leave request has been withdrawn. Your comment will be included in the email sent to your Manager



Leave requests cannot be created once the payroll period for the date range has been processed.

Approve/Decline an employee's Leave Request

To approve a Leave Request, click **Team's Leave Requests** on the **My Leave** tab page, and then click on the relevant **Leave request** for the employee:



Unapproved leave requests are colour-coded **orange**

IMS Online - Sample Company Limited																													
My leave My payslips My documents My details My password																													
My leave		Leave requests August 2018																											
Team's leave requests My leave requests Team's leave history My leave history		<< Prev Month Next Month >> Refresh Show me Print Show Legend																											
		Employee	W/1	T/2	F/3	S/4	S/5	M/6	T/7	W/8	T/9	F/10	S/11	S/12	M/13	T/14	W/15	T/16	F/17	S/18	S/19	M/20	T/21	W/22	T/23	F/24	S/25		
Number	Name	AL																											
1002	ASHTON, Colin	00.5 Days	8	8	8		8	8	8	8	8			8	8	8	8	8				AL	AL	AL	AL	AL			

Click the **Approve** button. The leave request changes to green to indicate it has been approved. The employee will receive an email notifying them that the Leave Request has been approved.

Click the **Decline** button and add a comment to explain why you are declining the Leave Request and then click **OK**.



When declining leave, the leave request will no longer be visible to the Employee, Manager nor the Administrator

Create a leave request on behalf of an employee

To create a leave request on behalf of an employee, click **Team's leave requests** on the **My leave** tab page, and then click on the relevant employee. Click **Create** button, and add a Leave Request in the usual manner.

IMS Online - Sample Company Limited

My leave | My payslips | My documents | My details | My password

My leave

Team's leave requests

My leave requests

Team's leave history

My leave history

Leave KPIs ▾

- Absenteeism trends
- Employee turnover
- Excessive annual leave
- Leave liability (units)

Leave requests August 2018

◀◀ Prev Month ▶▶ Next Month Refresh Show me Print Show Legend

Employee			W/1	T/2	F/3	S/4	S/5	M/6	T/7	W/8	T/9	F/10
Number	Name	AL										
1002	ASHTON, Colin	69.5 Days	8	8	8			8	8	8	8	8
1012	BLOXHAM, Peter	166.83 Hours	8	8	8			8	8	8	8	8
1015	CLARK, Andrea	363.4 Hours	8	8	8			8	8	8	8	8
1017	FLOWERS, Andrew	71 Days	7.5	7.5	7.5			7.5	7.5	7.5	7.5	7.5
1020	GARDINER, Anne	0 Hours	4	4	4			4	4	4	4	4

Within find Filter Previous Next

Leave request Flowers, Andrew (1017)

Create

Click submit from the Leave Requests details window, and then click Approve. The employee will receive two e-mails; the first to advise them a Leave Request has been submitted on their behalf, and then a second to advise them that the Leave Request has been approved.

Colour coding on the Leave Planner calendar

The leave planner is colour coded. Click on **Show Legend** to display the colour legend.

Leave planner 2018

◀◀ Prev Year ▶▶ Next Year Refresh Show me Show Legend

- Approved
- Partially Approved
- No Roster
- No Date
- Not Yet Approved
- Partial Day
- Public Holiday
- Unsubmitted
- Warning
- Weekend

General Information

Alerts & Warnings

As timesheets are updated, coloured warnings may display. There are two types of warnings:

- Critical (Red) warning – this warning must be addressed; you will not be able to Save or Submit your timesheet until it has been resolved.
- Information (Yellow) warning – this warning is for information purposes only; you should read the warning, take action if necessary, otherwise Save or Submit the timesheet as normal.



When a coloured warning is displayed, using your mouse, hover over the coloured alert and a message will appear advising you what the warning or message is

- Each organisation will have their own set of messages relative to them.

Logging out of IMS Online Express



The screenshot shows the IMS Online Express interface. At the top, it says "IMS Online - Bureau Demonstration" and "Logged in as : BLOXHAM, Peter (as Employee)". There are navigation tabs for "My time", "My payslips", "My documents", "My details", and "My password". A "Logout" link is visible in the top right corner. Below the tabs, there is a "My timesheet" section for "Bloxham, Peter (1012) (23/01/2017 - 29/01/2017 Unsubmitted)". A blue arrow points to the "Logout" link.



It is important to use the Logout link to ensure you are logged out of the system properly for security reasons.

Frequently Asked Questions

Q: What are the numbers on the leave planner calendar?

A: These reflect the number of hours you are rostered for each day.

Q: I have applied for Annual Leave at Christmas, but I have now changed my mind and I'd like to come back to work a couple of days earlier

A: You may withdraw the Leave Request, and then create a new Leave Request for the new dates.

Q: I want to apply for leave that falls in six months' time; does my leave balance reflect what my balance will be at that time?

A: No. The leave balance displayed reflects the leave balance as at the last closed pay period in IMS Payroll.

Q: I got a warning saying I have insufficient leave for my future Leave Request, so Leave without Pay applies. However, I will have enough available by the time I take the leave. Why does this warning show?

A: The warning is based on your leave balance right now, as at the last closed pay period. Leave payments will be recalculated in the future so if you have sufficient leave by the time the Leave Request is due to be paid, then paid leave will apply.

Q: My Leave Request includes a public holiday. Do I have to do two Leave Requests to make sure leave isn't deducted on the public holiday?

A: No. IMS Online Express works out that a public holiday is included within the Leave Request, and will pay a Statutory Holiday instead (as long as that day is a rostered day for you). A yellow warning will display alerting you that a Statutory Holiday is payable rather than normal leave.

Q: Why can't I see any reason codes when I try applying for leave?

A: Are you a casual employee? If so, casuals cannot apply for leave in IMS Online Express. Alternatively, make sure you're not typing letters into the Reason field – IMS Online Express will attempt to shorten the list based on what you type. This means if you have typed say "Q" into the field, no leave reasons meet these criteria. Try entering a "?" or use the dropdown arrow instead.

Q: What happens if I try to apply for leave during a period for which I am not rostered to work?

A: A warning will display so no leave payments are generated for non-rostered days.