MyPeople User Guide
Guidance for Managers

Version: 1
Dated: November/2017
Please think before printing this document.

Where printing is necessary, please ensure that it is printed double sided and in greyscale.
Contents

1 Introduction ........................................................................................................... 1
  1.1 What is MyView Dashboard? ........................................................................ 1
  1.2 What is new about MyView Dashboard? .................................................... 1
  1.3 When will employees have access to the new MyView Dashboard? .......... 2
  1.4 Further information ...................................................................................... 2

2 What is MyPeople? ............................................................................................... 3
  2.1 Accessing MyPeople .................................................................................... 4
  2.2 Navigating MyPeople .................................................................................. 4

3 View Employee Personal Details ....................................................................... 8

4 Submit Induction Checklist Completion Date for Agency Social Workers ....... 9

5 Authorisations .................................................................................................. 10
  5.1 Quick Authorisation .................................................................................... 11
  5.2 Authorising a Mileage and Expenses Claim ............................................. 11
    5.2.1 Checking Receipts .................................................................................. 14
    5.2.2 Claim Warning Messages ..................................................................... 15
  5.3 Employee Form History ............................................................................... 15

6 Delegation of Authority ..................................................................................... 17
  6.1 Editing/Deleting a Delegation Rule ............................................................. 18

7 Help and Guidance ............................................................................................ 19
## 1 Introduction

### 1.1 What is MyView Dashboard?

MyView Dashboard is a web based self-service system that allows employees and managers to view and edit their own personal details online.

MyView Dashboard supports the Council’s objective of making processes more efficient and streamlined.

Revised user guidance documentation to support the use of MyView Dashboard and Frequently Asked Questions are available via www.durham.gov.uk/MyView.

Providing access to MyView Dashboard via the internet will give you 24/7 access allowing you to:

- View and update personal information, including name, address and emergency contact information.
- View, download and print payslips and P60 statements.
- Submit mileage and expenses claims as well as uploading receipts.
- Employees will be able to submit training requests for managers to authorise.
- Managers will be able to view expense submissions, authorise, and reject claims if required.

### 1.2 What is new about MyView Dashboard?

As well as providing access over the internet, MyView Dashboard has an enhanced look and feel and is much more intuitive to use. MyView Dashboard has a number of features and benefits including:

- Enhanced navigation, usability and appearance – MyView Dashboard can be accessed using smart devices mobile phones and tablets
- Customisable widgets that provide quick access to information
- Appearance and functionality has been improved
- The ability to view authorisation progress across all MyView Dashboard forms
- Removal of Payslip and P60 printing and postage costs by enabling access to e-Payslips and P60’s.
1.3  When will employees have access to the new MyView Dashboard?

All employees that have access to the internal DCC network will be able to use the new MyView Dashboard from **November 2017**.

From November 2017, secure online access to MyView Dashboard from outside the Council network (i.e. over the internet) from any computer or mobile device will be rolled out to employees on a phased basis. The timetable is detailed below:

- 1 November 2017: Adult and Health Services Resources Transformation and Partnerships
- 1 December 2017: Children and Young People Services (excluding schools)
- 1 January 2018: Schools
- 1 February 2018: Regeneration and Local Services

Managers will not have access to the MyPeople tab to perform manager actions when accessing MyView Dashboard from outside the DCC network. However, managers will be able to authorise forms (e.g. expenses claims) via the MyView Dashboard widget.

Managers connected to MyView Dashboard via Pulse Secure WILL have access to MyPeople to perform manager actions.

1.4  Further information

If you would like any further advice or would like the document in an alternative format, please contact the MyView Team within HR Operations and Data using the contact details below:

Please ask us if you would like this document summarised in another language or format.

<table>
<thead>
<tr>
<th>العربية (Arabic)</th>
<th>中文 (繁體字) (Chinese)</th>
<th>اردو (Urdu)</th>
<th>polski (Polish)</th>
<th>ਪੰਜਾਬੀ (Punjabi)</th>
<th>Español (Spanish)</th>
<th>বাংলা (Bengali)</th>
<th>हिंदी (Hindi)</th>
<th>Deutsch (German)</th>
<th>Français (French)</th>
<th>Türkçe (Turkish)</th>
<th>Melayu (Malay)</th>
</tr>
</thead>
</table>

**MyView@durham.gov.uk**

03000 269 919

Braille  Audio  AAA  Large Print
2 What is MyPeople?

As a manager, you will have your own set of actions and categories available to you because you have employees directly reporting to you. These actions and categories are available to you on the left hand navigation menu under the “My People” tab.

The MyPeople module allows Managers to:

- View appointment and contact details for all employees in your reporting line via the ‘standard team selector view’
- Submit sickness absence details (and other types of leave) for employees
- View an employee absence calendar
- Submit appraisal event details for employees
- Submit electronic documentation related to team management activities including Sickness Absences, appraisals and induction/leaver checklists
- Submit Induction Checklist completion dates for Agency Social Workers
- Create a temporary expenses authorisation delegation and/or appraisal event input delegation to cover planned leave
- View Emergency Contact/Next of Kin Details and Home Address Contact Details for your employees
- View employee training history
- View form history previously created by or on behalf of employees in your reporting line including expenses claims, training requests, vehicle changes and personal details changes
• Link to MyWorkforce system to submit establishment control changes

Note: Managers should refer to the relevant guidance documentation on how to use some of the manager functionality listed above:

• Leave Management (Sickness Absence and other types of leave)
• Performance Appraisal
• Training
• Travel and Expenses

2.1 Accessing MyPeople

The My People module option should appear on your MyView Dashboard homepage – click the link for access. The MyPeople module is automatically available to a manager if they have employees reporting to them.

The MyPeople module will not be available to managers when accessing MyView Dashboard from outside of the DCC network (i.e. you will not have access to the My People module when logging in to MyView Dashboard from home).

Should you access MyView Dashboard using Pulse Secure you will have access to the MyPeople module as you are accessing the DCC network using the Pulse Secure connection software.

If the MyPeople module is not available to you when logged in via the DCC network, it will mean that there are no employees are currently reporting to you. In addition, you may notice that an employee who you manage does not appear within the ‘standard team selector view’ and/or an employee whom you do not manage does appear. In these circumstances, please complete a MyPeople changes request form with appropriate details so that reporting lines can be updated.

Should you submit a request to amend reporting lines the MyView Helpdesk Team will endeavour to update reporting lines as soon as possible. However, we would ask that you allow us two working days to complete your request.

Any amendment to a reporting line will be ‘live’ as soon as it is made. However, it is important to point out that you may not see the amendment when looking in MyPeople until the next day.

Should you have any queries over an amendment to a reporting line please email MyView@durham.gov.uk or telephone: 03000 269 919.

2.2 Navigating MyPeople

The MyPeople tab dynamically changes depending on whether you have selected employee(s) or not:

• If an employee is not selected, the MyPeople tab contains links to available categories and actions that are relevant to team management activities e.g. Submit Employee Absence.
• If an employee is selected, the MyPeople tab shows details of the selected employee, plus links to available categories and actions that are relevant to individual employees e.g. View Form History

• If more than one employee is selected, the MyPeople tab shows how many people are selected, plus links to available categories and actions that are relevant to multiple employees, such as the planner.

The ‘standard team selector view’ enables managers (and employees with delegated access) to select one or more employees to work with. Upon displaying the MyPeople tab, the ‘standard team selector view’ is automatically displayed. You can perform actions without selecting employees but these are limited to team management activities.

By default, your direct reports are listed and you can find employees in a number of ways:

• Display your whole team instead of direct reports by selecting [Whole Team] from the drop-down list on the ‘standard team selector view’. You can then filter the selection further by displaying employees reporting to a specific post if you have more than one post, by selecting the appropriate post from the drop-down list beneath the Team Filter.

• Search for an employee by entering all or the initial part of their name (first and/or surname) by using the [Search by team member name] field of the ‘standard team selector view’. This searches the employees that are contained in the currently selected filter, for example, your direct reports.

• Click on a letter in the Surname filter bar to jump straight to employees whose surname begin with that letter. The Surname filter bar applies to employees that are contained in the currently selected filter, for example, your direct reports. Letters that do not correspond to any employee surnames are greyed out.

• Scroll through the list of employees contained in the currently selected filter, navigating between pages as required.
You can view further details about the employee by clicking their name (or picture if available).

- Click the [Select] button to select the required employee. You can select a different employee if required by clicking the [Select] button against them instead.
- You can select more than one employee by clicking the + icon next to the [Select] button of the additional employee.
- You can de-select an employee by clicking the - icon next to the [Select] button.
- If you have selected one employee, the name is displayed at the top of the left hand navigation panel. If multiple employees are selected this is shown at the top of the navigation panel.

- You can filter the list to only display the selected employees by selecting [My Selections] from the drop-down list on the ‘standard team selector view’.
- If an employee is also a manager, then a [Show Reports] button is available. Click this button to show the employee’s direct reports (with the employee highlighted at the top of the list). This allows you to drill down through the reporting hierarchy in your area.
At any point when drilling down through the reporting hierarchy you can use the [Back to My Reports] option to return to your direct reportees or the [Back to Peers] which you can click to return to the previous view.

By clicking on an employee’s name, it will open up another window displaying their personal details and appointment history.
3 View Employee Personal Details

Managers are now able to view Emergency Contact/Next of Kin Details and Home Address Contact Details for the employees they manage.

All employees are encouraged to maintain/update their Emergency Contact/Next of Kin Details/Home Address details via [Employee Personal Details].

- Within MyPeople, click [View Employee Personal Details].
- Select the relevant form from the available options.
- Select the relevant employee. Click on the [+] to expand on the employees that report to the manager. To ‘roll up’ the display of employees, click on the [-]. Once you have selected the correct employee, click [Next].
- After selecting [View Next of Kin Details] you would click on [Close Contact] and the click [Cancel] to return to the 'View Employee Personal Details' page. Click [Team Selector] to return to the standard Team Selector view.
- After selecting [View Home Address Contact Details] click [Cancel] to return to the ‘View Employee Personal Details’ page. Click [Team Selector] to return to the standard Team Selector view.
4 Submit Induction Checklist Completion Date for Agency Social Workers

Managers are able to record an Induction Checklist Completion Date for Agency Social Workers that they manage.

The recording of an Induction Checklist Completion Date only applies to Agency Social Workers. Managers do not need to record dates for DCC employees or any other agency workers.

- Within MyPeople, click [Manager Processes] then click on [Agency Worker Induction Checklist Date].

- Select the relevant employee. Click on the [+ ] to expand on the employees that report to the manager. To ‘roll up’ the display of employees, click on the [- ]. Once you have selected the correct employee, click [Next].

- You will be presented with a summary of the employee’s Employment History. Click [Next].

- You will then be presented with a form to complete. The following details should be recorded:
  - Change Reason - select ‘Other’
  - Effective Date - select the same date as the ‘Induction Checklist Completion Date’
  - Induction Checklist Completion Date - record the date that the Induction Checklist was completed.

- Click [Submit]. Select [OK] when asked to confirm submission.

- Click [Team Selector] to return to the standard Team Selector view.

Note: The recording of the Induction Checklist Completion Date for Agency Workers should be supplemented by uploading the completed documentation against the worker record. Managers should uploaded induction checklist documents via the ‘Appraisal Documentation’ option within [Employee Electronic Documents].
5 Authorisations

Requests pending authorisation are displayed in the Authorisations widget on the dashboard displaying pending authorisations by type. You can click a pending authorisation to view further details. You can authorise and reject authorisations directly from this widget.

If you have any requests awaiting authorisation you will have received an e-mail from resourcelink@durham.gov.uk asking you to log into MyView Dashboard to authorise the request.

All authorisation requests need to be actioned within 7 calendar days before the request is automatically rejected back to the employee.

To view/authorise requests pending authorisation:

- Click on the request for which you would like to view further details to display the form. If relevant to the form type, the planner is also displayed.

- If you are happy to authorise the request, you can add any notes in the ‘Authorisation/Rejection Notes’ section before clicking [Authorise] or [Reject].

After the request is authorised or rejected it is removed from the list of requests pending authorisation.

If you reject a form, you should include sufficient text so that your member of staff understands the reason why the form was rejected.
5.1 Quick Authorisation

If you hover over the request form name, you have the option to quickly authorise/reject the request without opening up the request form to view the details. This may be useful for authorising training requests.

- If you select the icon, you can bring up summary details of the authorisation request.
- If you select the or the icon, you will then be able to click [Submit] to action the request. A further message will ask you to confirm the authorisation/rejection.

- A confirmation message will then appear. Click [OK].

5.2 Authorising a Mileage and Expenses Claim

You can choose to authorise the whole expenses claim (as described above) or authorise just part of the claim.

To view/authorise a claim pending authorisation:

- Click on the request for which you would like to view further details to display the claim form.
If you want to authorise/reject the whole claim, you can add any notes in the ‘Authorisation/Rejection Notes’ section before clicking [Authorise] or [Reject].

Alternatively, you can authorise just part of the claim rather than having to reject the whole claim if there is an issue with individual line(s).

- If you select the ✔️ or the ✗ icons you can authorise/reject each individual line of the claim.

- If actioning a claim on a line by line basis, you will need to select an action for each line of the claim otherwise you will get the following error message:

```
Total Lines: 2  Total Miles: 43

You must select an action for each line
```

- If authorising/rejecting part of a claim, you have the option to include separate authorisation and rejection notes:
• You will then be able to click [Submit] to confirm authorisation/rejection of the selected claim lines.

• Alternatively, rather than auctioning each line of the claim, you still have the option to to [Authorise All] or [Reject All] lines of the claim.

**Note:** Ensure that business mileage and excess travel/disturbance mileage have been claimed accordingly.
5.2.1 Checking Receipts

You are reminded to check that appropriate VAT and expenses receipts have been attached to the claim.

Receipts can be attached to the claim header (e.g. VAT receipt covering the whole claim) or against each individual line of a claim (e.g. an expenses receipt).

- If the claimant has attached a receipt, it will be shown against the claim header/line. Click on the hyperlink.

- The attachment will open up in another window.
5.2.2 Claim Warning Messages

The Mileage and Expenses Module has limits on expenditure types that will generate a warning message when someone tries to claim over the warning limit. **MyView will not automatically block a claim that is above the set amount. It is the manager’s discretion as to whether or not to authorise/reject the claim.**

![Claim Warning Message](image)

**Note:** Managers are encouraged to take additional consideration of claims made outside of a three month period of incurring the expenditure particularly if there a valid reason for the delay (e.g. long term sickness). An excessive workload is not an acceptable reason for failing to submit a claim within the desired timescale.

5.3 Employee Form History

You can view all of the forms that your employees have previously submitted.

- Within MyPeople, click [Select] against the relevant employee
- Click [MyPeople Form History] from the left hand navigation panel

This will bring up the Form History for the selected employee displaying a summary of the form.

![Form History](image)

- Click on the form name under [Description] to open the relevant form
• Alternatively, click on the icon to display a summary of the form.

![Summary of form](image)

• The form includes a section called [Authorisation Progress]. Click on the green/orange icon to view authorisation status details.

**Note:** An authorised form will show a green tick whilst a submitted form will show an orange icon.

![Authorisation Progress](image)

Details of the authorisation progress are displayed including who authorised it and date/time.

![Authorised By](image)

Once a form has been authorised the status will change from to.
6 Delegation of Authority

The Delegation of Authority module enables managers to delegate responsibilities and authorisations to another individual. This is typically a member of your team, or your manager at the next level.

For example, a manager may be going on holiday and wants to delegate expenses authorisations to another employee while they are away. **Before setting up a delegation rule you should consider whether this is actually necessary or whether your team can wait for authorisation until you return to the office.**

**Leave Management responsibilities cannot be delegated.** Your Line Manager is automatically set up to enter absences for your team when you are out of the office or not able.

There are two types of delegation rule:

- Authorisation – gives a delegate ability to authorise (Expenses)
- Responsibilities – gives a delegate ability to enter (Appraisals)

**Note:** only the Expenses and Appraisal modules can be delegated.

To create a delegation rule:

- Within MyPeople, click [Delegations]
- Click [Add New] to display the Delegation of Authority form
- Complete the Delegation of Authority form with the delegation details
- Enter the “**Description**” of the authorisation. It is advised that this should include the name of the individual or team that the delegation covers e.g. ‘Delegation to Joe Bloggs’
- Click [Search] to find the individual to you are delegating the responsibility. Enter criteria to retrieve the matching employee. Click [Search] to display results. Select the required employee and then select [Continue]
- Click [Select] to choose the modules that you wish to delegate. Click [Continue].
- Enter the delegation period and click [Submit] to save the delegation rule.

The Confirmation Message is displayed before returning to the Delegation of Authority module, where the delegation is displayed in the Delegation section.
6.1 Editing/Deleting a Delegation Rule

Delegation rules that you have created are listed in the Delegation section, which can be viewed, amended and deleted as required. A delegation rule can only be deleted by the employee who created the rule.

To view, amend and delete a delegation rule:

- Click the description of the delegation rule that you want to amend to redisplay a view-only Delegation of Authority form
- Click [Edit] and amend the delegation rule

**Note:** If you want to delete the delegation rule, you can click [Delete] once you are in edit mode.

- Click [Save] to save the delegation rule change.
7 Help and Guidance

If you require any further advice or guidance on MyView Dashboard, you can refer to the ‘Help’ section. Alternatively, you can visit www.durham.gov.uk/MyView.