

IMS PAYROLL

online max

IMS Online Max

**Employee
user guide**

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Logging into IMS Online Max

Web address

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



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

Login details

Your login name is your IMS Payroll employee number.

The first time you log into IMS Online Max, 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 have 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 have nine opportunities to enter a password before you will be locked out of the system.

Changing your password

You can change your password at any time when logged into IMS Online Max.

Click on the 'My Password' tab page, and enter new password details:

Field	Explanation
Current password	<ul style="list-style-type: none"> Enter current password (case-sensitive)
New password	<ul style="list-style-type: none"> Enter a new password that will apply from next login into IMS Online Max. Ensure it is secure.
Confirm password	<ul style="list-style-type: none"> Re-enter your new password.

Press **Save**.

IMS Online Max screens



The following tab pages are available in IMS Online Max:

- **My time**
 - *Enter and submit timesheets*
 - *View potential timesheet payments*
 - *Check the status of Timesheets (not approved, approved)*
 - *View historical timesheets*
- **My leave**
 - *Apply for leave online*
 - *View past, current and future Leave Requests*
 - *Check the status of Leave Requests (not approved, approved)*
 - *View scheduled days of work*
 - *View actual leave history payments*
- **My payslips**
 - *View payslips online*
- **My documents**
 - *View documents online (for example, company policies, newsletters etc)*
- **My details**
 - *Review personal payroll details*
 - *Notify Payroll department if changes are required*
- **My password**
 - *Change password details*



Please refer to [Employee Guide \(IMS Online Express\)](#) for instructions on how to navigate My leave / My payslips / My documents / My details / My password.



If you are a Manager, you will see additional screens.
Please refer to the Manager guide for further information.

Timesheets

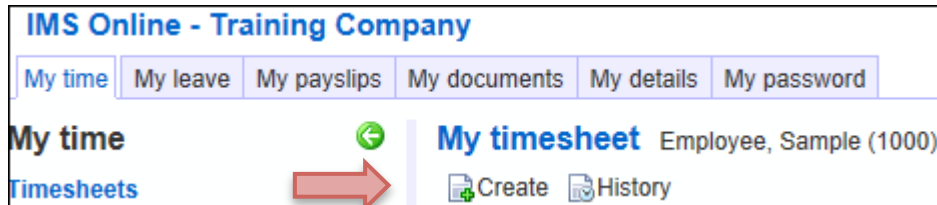
The following functionality is available for employees on the **My Time** tab page:

- Create a timesheet
 - *generally this function isn't necessary as most organisations' have their payroll department create all employees' timesheets at the beginning of each pay period*
- Enter timesheet
- Submit timesheet to manager for approval
- Withdraw timesheet
- Check the status of timesheets (not approved, approved)
- View historical timesheets

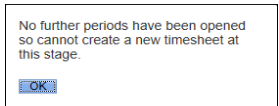
Create a Timesheet

In some organisations, timesheets are created by the Payroll administrator. If they are not, employees are able to create their own timesheets.

To create a Timesheet, click **Create** on the **My time** tab page:



You will only be able to create timesheets for pay periods that are open. Pay periods are opened by your Payroll Administrator. If this message appears you need to wait until the pay period is opened.



A new editable timesheet for the current pay period will display on-screen. Each day will be populated with the rostered hours. Any leave that has been previously entered into the Leave Planner will be automatically populated against the appropriate day.

My timesheet Employee, Sample (1000) (12/08/2013 - 25/08/2013 Unsubmitted)

Create History Submit Delete

Timesheet Employee, Sample (1000) (12/08/2013 - 25/08/2013 Unsubmitted)

Leave balances

AL Outstanding	AL Accrued	AL Total	Alt Holiday	Service	Shift	TIL	
45.84 Hours	121.85 Hours	167.69 Hours	0 Days	0 Hours	0 Hours	0 Hours	Fortnightly 12/08/2013 - 25/08/2013 - Open 12/8-15/8, 19/8-23/8

Date	Start	End	Break	Leave / work type (optional)	Notes	Hours	Roster
Mon 12/8	08:00	16:30	00:30			8	8
Tue 13/8	08:00	16:30	00:30			8	8
Wed 14/8	08:00	16:30	00:30			8	8
Thu 15/8	08:00	16:30	00:30	Sick Leave		8	8
Fri 16/8							
Sat 17/8							
Sun 18/8							
Mon 19/8	08:00	16:30	00:30			8	8
Tue 20/8	08:00	16:30	00:30			8	8
Wed 21/8	08:00	16:30	00:30			8	8
Thu 22/8	08:00	16:30	00:30			8	8
Fri 23/8	08:00	16:30	00:30			8	8
Sat 24/8							
Sun 25/8							
						4.5	72 72

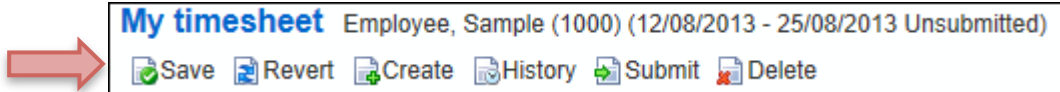
Payment	Rate	Mon 12/8	Tue 13/8	Wed 14/8	Thu 15/8	Fri 16/8	Sat 17/8	Sun 18/8	Mon 19/8	Tue 20/8	Wed 21/8	Thu 22/8	Fri 23/8	Sat 24/8	Sun 25/8	12/8-25/8 Units
SALARY, Salary	PDR				-1											-1
SICK LEAVE, Sick Leave					1											1

Navigating the Timesheet

This section explains the different areas on the timesheet and tips for entering information.

Action Buttons

You will have some or all of the following actions on the **My time** page:

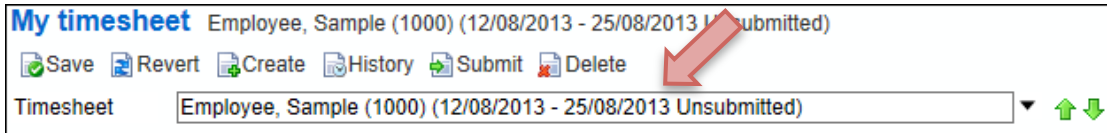




Action	Explanation
Save	<ul style="list-style-type: none"> This Action appears when you start entering information into the timesheet After entering data you should click 'Save' to ensure the information is saved
Revert	<ul style="list-style-type: none"> This Action appears when you start entering information into the timesheet If you have entered information and wish to remove it, by clicking on Revert it will take the timesheet back to the last time it was saved
Create	<ul style="list-style-type: none"> Creates a new timesheet for the first available pay period Will not create a new timesheet for a period which has already had a timesheet created i.e. cannot duplicate timesheets The message "No further periods have been opened so cannot create a new timesheet at this stage" indicates the current pay period is not open therefore is not available for entering timesheets
History	<ul style="list-style-type: none"> Shows historical timesheets
Submit	<ul style="list-style-type: none"> Submits the timesheet to your manager for approval Submitted timesheets cannot be modified unless it is first Unsubmitted.
Unsubmit	<ul style="list-style-type: none"> Shown only when the timesheet has been Submitted Changes the timesheet back to an editable state Timesheets cannot be unsubmitted if they have already been Approved by your manager
Approve (Managers only – refer to the Manager guide for instructions)	<ul style="list-style-type: none"> Only available to Managers/Administrators Marks the timesheet as Approved Unapproved timesheets will still be exported to payroll Timesheets can be Approved regardless of whether they have been submitted or not
Delete	<ul style="list-style-type: none"> Deletes the current timesheet. Not reversible. Once a timesheet is deleted a new one will need to be created by clicking Create

Field Definitions

Timesheet Period:

This box shows the pay period that the timesheet is for:



You are able to view previous  or any future opened  timesheets by using the green arrows at the right hand side.

Leave Balances:




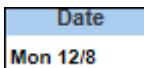
This area on the timesheet displays your leave balances. They are balances as at the last closed pay. Balances update after each payrun is closed. Balances do not update as you enter leave into the Leave Planner or Timesheet, balances are controlled by the actual payroll system.

Leave balances						
AL Outstanding	AL Accrued	AL Total	Alt Holiday	Service	Shift	TIL
45.84 Hours	121.85 Hours	167.69 Hours	0 Days	0 Hours	0 Hours	0 Hours

Timesheet Body:

The below table explains the fields within the body of the timesheet. Every organisation is unique so timesheet layouts will differ between companies (e.g. some companies may show which cost centre payments will be charged to).

This table contains generic fields generally used by all organisations:

Column	Explanation
	<ul style="list-style-type: none">  Clicking this button will remove everything that has been entered on this day. It will also remove any additional lines that may have been created on a day  Clicking this button will create a new line. For example if you wanted to enter two time-bands on one day, two leave types taken on one day or a partial day's leave
	<ul style="list-style-type: none"> Week days are displayed in black font colour Weekend days are displayed in purple font colour Public holidays are displayed in green font colour

<table border="1"> <tr><th>Start</th></tr> <tr><td>08:00</td></tr> </table>	Start	08:00	<ul style="list-style-type: none"> Employees start time for that day. When timesheet is first opened this will be populated with the rostered start time
Start			
08:00			
<table border="1"> <tr><th>End</th></tr> <tr><td>16:30</td></tr> </table>	End	16:30	<ul style="list-style-type: none"> Employees end time for that day. When timesheet is first opened this will be populated with the rostered end time
End			
16:30			
<table border="1"> <tr><th>Break</th></tr> <tr><td>00:30</td></tr> </table>	Break	00:30	<ul style="list-style-type: none"> The amount of unpaid break for that day. This is determined by the roster and any configuration rules determining breaks Breaks can be overridden manually
Break			
00:30			
<table border="1"> <tr><th>Leave / work type (optional)</th></tr> <tr><td> </td></tr> </table>	Leave / work type (optional)		<ul style="list-style-type: none"> A picklist of reason codes will be available for recording the type of leave or time worked, for example Annual Leave, Public Holiday Worked, Call-outs. These reason codes are based on what is configured for your particular organisation
Leave / work type (optional)			
<table border="1"> <tr><th>Notes</th></tr> <tr><td> </td></tr> </table>	Notes		<ul style="list-style-type: none"> Free format field used to record any notes about that day
Notes			
<table border="1"> <tr><th>Hours</th></tr> <tr><td>8</td></tr> </table>	Hours	8	<ul style="list-style-type: none"> This calculates the number of hours worked, excluding unpaid breaks. It may differ from rostered hours if any additional time has been worked or the full rostered day has not been worked
Hours			
8			
<table border="1"> <tr><th>Roster</th></tr> <tr><td>8</td></tr> </table>	Roster	8	<ul style="list-style-type: none"> This is the rostered hours for the day
Roster			
8			

Payment:

Payments are generated according to what is entered on the timesheet e.g. overtime payments, leave taken, Public Holiday payments etc. Calculated payments will display on each day. These transactions will be sent through to the payroll system for payment. Therefore it is important you view this section when entering timesheet data.

Payment	Rate	Mon 12/8	Tue 13/8	Wed 14/8	Thu 15/8	Fri 16/8	Sat 17/8	Sun 18/8	Mon 19/8	Tue 20/8	Wed 21/8	Thu 22/8	Fri 23/8	Sat 24/8	Sun 25/8	12/8-25/8 Units
SALARY, Salary	PDR				-1											-1
SICK LEAVE, Sick Leave					1											1



The above example is for a Salaried employee. The transactions are reversing a day's Salary and replacing it with a paid Sick Day.

Status:

This shows the status history of the timesheet and which user has undertaken each function.

Status			
Date	Description	Role	Status
9/08/2013 8:59:50 a.m.	EMPLOYEE, Sample	Employee	Unsubmitted



The above example shows the timesheet is currently Unsubmitted. Once it is submitted for approval another line will display showing the date and time the timesheet was submitted and by whom.

Entering Timesheets

This section assists you in entering your timesheet information.

Time Entries

New time entries and changes to rostered times can be made against each day. Simply change the rostered start or end time or break time to match what you worked. Applicable payments will be calculated based on the times entered.

For example if you are entitled to paid overtime and this is configured for payment within the system, altering an end time to show you worked an additional hour, will create an overtime transaction in the Payment section of the timesheet.

Start and End times can be entered in various formats. (All times are shown in 24 hour format). End times will automatically switch to PM in order to be after the Start time on the same day.

Entry	Result
8	8:00 (or 20:00 if used for an End time that starts after 8:00 am)
830	8:30 (or 20:30 if used for an End time that starts after 8:30 am)
1630	16:30 – Translates directly into 24 hour time
430p	16:30 – The p indicates this is 4.30pm, which is then turned into 24 hour time
13	13:00 – Translates directly into 24 hour time
1p	13:00 – The p indicates this is 1 pm, which is then turned into 24 hour time


Break times are entered as the number of minutes of unpaid break. For example 00:30 equates to a 30 minute unpaid break, 01:00 equates to a 1 hour unpaid break.

Start	End	Break
08:00	16:30	00:30
08:00	16:30	01:00

Multiple Time-bands on one day

Sometimes multiple time-bands may need to be entered on one day. This may occur in these situations:


- Call-backs after rostered shift finishes
- Split shifts
- Charging time to different cost centre
- Different jobs worked on the one day that are paid differently

To create more than one row on one day, click the  button. This will open up an additional row.

My timesheet Employee, Sample (1000) (12/08/2013 - 25/08/2013 Unsubmitted)

Save Revert Create History Submit Delete

	Date	Start	End	Break	Leave / work type (optional)	Notes	Hours	Roster
	Tue 13/8	08:00	16:30	00:30			8	8
		16:30						

Click the  button if you wish to remove a row.

To remove data within a single field, you can click on the 'x' at the end of the box. For example, clicking on the 'x' in this box will remove the Sick Leave reason code from that box. This is quicker than manually back-spacing out the data.



Leave Taken

If you wish to enter some leave taken, click on the black drop-down arrow next to the Leave / Work type box.



A pick-list of reason codes relative to your organisation will appear. Select the appropriate one by clicking on it. Alternatively, if you know the reason type, you can start typing it in the box and it will take you to that reason code.


leave balances

AL Outstanding	AL Accrued	AL Total	Alt Holiday	Service	Shift	TIL	Fortnightly
45.84 Hours	121.85 Hours	167.69 Hours	0 Days	0 Hours	0 Hours	0 Hours	29/07/2013 29/7-1/8, 5/8-9/8

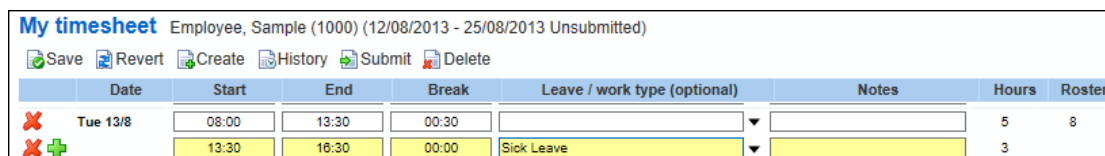
	Date	Start	End	Break	Leave / work type (optional)	Notes	Hours	Roster
	Mon 29/7	08:00	16:30	00:30			8	8
	Tue 30/7	08:00	16:30	00:30	Alternative Holiday	AH	8	8
	Wed 31/7	08:00	16:30	00:30	Annual Leave	AL	8	8
	Thu 1/8	08:00	16:30	00:30	Bereavement Leave	BL	8	8
	Fri 2/8				Jury Service	JS		
	Sat 3/8				Leave without Pay	LWP		
	Sun 4/8				Public Holiday Worked	PHW		
	Mon 5/8	08:00	16:30	00:30	Service Leave	SV	8	8
	Tue 6/8	08:00	16:30	00:30	Shift Leave	SH	8	8
	Wed 7/8	08:00	16:30	00:30	Sick Leave	SL	8	8
	Thu 8/8	08:00	16:30	00:30	Study Leave	ST	8	8
	Fri 9/8	08:00	16:30	00:30	Time in Lieu	TIL	8	8
	Sat 10/8							
	Sun 11/8							




Partial Days Leave

For partial days leave, you should create an additional line for the applicable day.

To create an additional row, click the  button.

On the applicable row, select the appropriate leave reason.



	Date	Start	End	Break	Leave / work type (optional)	Notes	Hours	Roster
	Tue 13/8	08:00	13:30	00:30			5	8
 		13:30	16:30	00:00	Sick Leave		3	

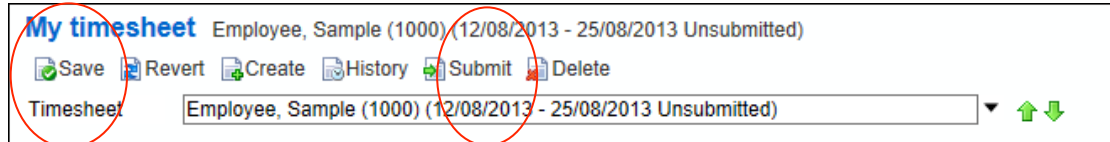


The above example shows the employee has taken three hours sick leave from 13:30 to 16:30.

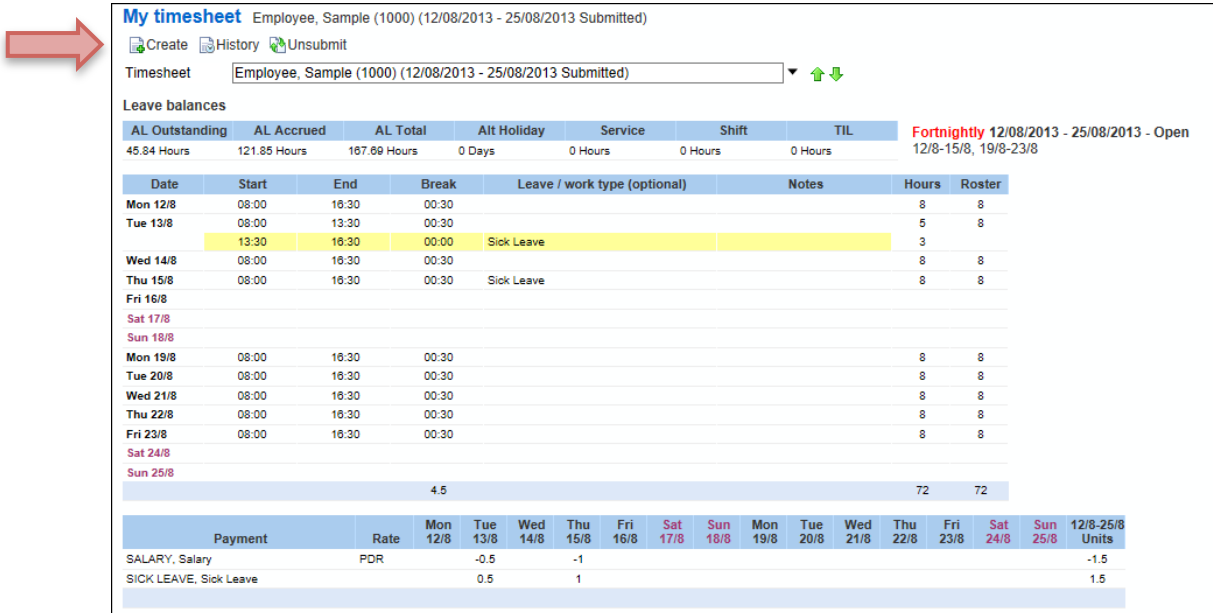
Submitting Timesheets for Approval

When you have finished entering your timesheet, you should Save it before submitting to your manager for approval.

To submit a completed timesheet, on the **My time** page (firstly checking you have the appropriate timesheet) click the **Submit** button.



After Submitting, the timesheet becomes un-editable and the Action buttons are reduced to Create / History / Unsubmit.



The Status section will be updated to show the date and time the timesheet was submitted for approval.

Status			
Date	Description	Role	Status
9/08/2013 11:28:02 a.m.	EMPLOYEE, Sample	Employee	Submitted
9/08/2013 8:59:50 a.m.	EMPLOYEE, Sample	Employee	Unsubmitted

At the top of the timesheet it will also show Submitted

My timesheet Employee, Sample (1000) (12/08/2013 - 25/08/2013 Submitted)

 Create  History  Unsubmit

Timesheet   



Withdrawing Timesheets

A timesheet can only be withdrawn before it is approved by your manager.

To withdraw a completed timesheet, click on **My time**, select the applicable timesheet from the employee/period drop down box and click the **UnSubmit** button.



You will be given the opportunity to put a comment in as to why you're withdrawing the timesheet.

Click **OK**.



The timesheet becomes editable again

My timesheet Employee, Sample (1000) (12/08/2013 - 25/08/2013 Unsubmitted - Forgot to enter some sick leave)

Create History Submit Delete

Timesheet Employee, Sample (1000) (12/08/2013 - 25/08/2013 Unsubmitted - Forgot to enter some) ↑ ↓

Leave balances

AL Outstanding	AL Accrued	AL Total	Alt Holiday	Service	Shift	TIL	Fortnightly 12/08/2013 - 25/08/2013 - Open	
45.84 Hours	121.85 Hours	167.69 Hours	0 Days	0 Hours	0 Hours	0 Hours	12/8-15/8, 19/8-23/8	

Date	Start	End	Break	Leave / work type (optional)	Notes	Hours	Roster
Mon 12/8	08:00	16:30	00:30			8	8
Tue 13/8	08:00	13:30	00:30			5	8
	13:30	16:30	00:00	Sick Leave		3	
Wed 14/8	08:00	16:30	00:30			8	8
Thu 15/8	08:00	16:30	00:30	Sick Leave		8	8
Fri 16/8							
Sat 17/8							
Sun 18/8							
Mon 19/8	08:00	16:30	00:30			8	8
Tue 20/8	08:00	16:30	00:30			8	8
Wed 21/8	08:00	16:30	00:30			8	8
Thu 22/8	08:00	16:30	00:30			8	8
Fri 23/8	08:00	16:30	00:30			8	8
Sat 24/8							
Sun 25/8							
						4.5	72

The Status of the timesheet is updated to show it is now Unsubmitted and the reason from above is recorded in the 'Comment' field.

Status					
Date	Description	Role	Status	Comment	
9/08/2013 11:44:48 a.m.	EMPLOYEE, Sample	Employee	Unsubmitted	Forgot to enter some sick leave	
9/08/2013 11:28:02 a.m.	EMPLOYEE, Sample	Employee	Submitted		
9/08/2013 8:56:50 a.m.	EMPLOYEE, Sample	Employee	Unsubmitted		



If you need to withdraw a timesheet after it has been approved by your manager, you will need to contact your manager to arrange for them to do it.

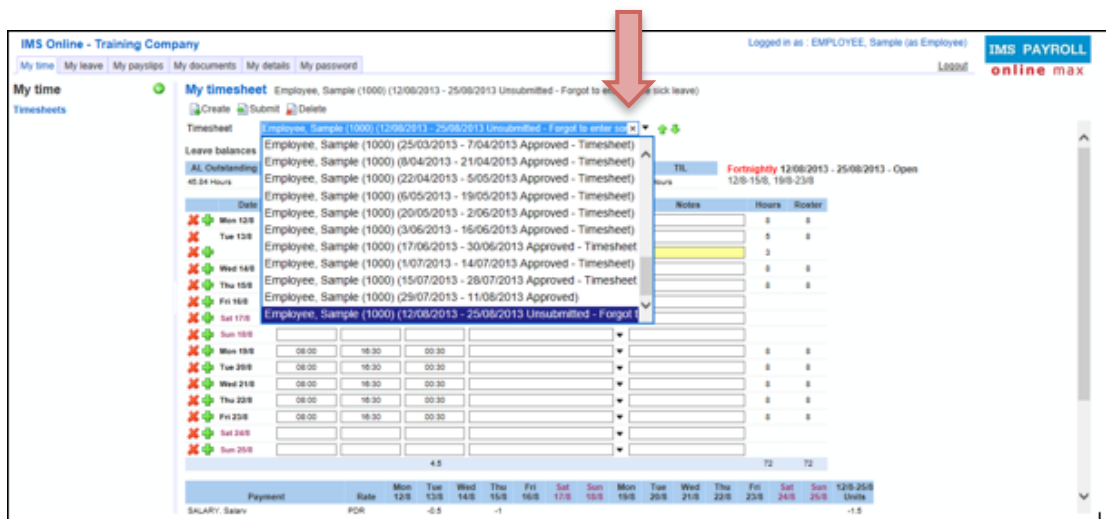
Viewing Historical Timesheets

You can view historical timesheets from the **My time** page.


Click on the History button



The drop down box is where individual timesheets are selected, and can be opened by clicking on the black drop-down arrow on the right. Timesheets will be displayed in date order, oldest to newest.



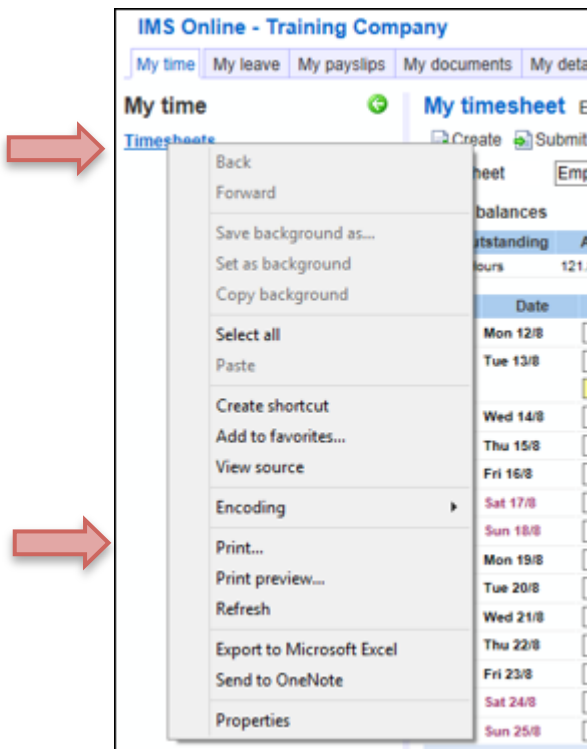
Select the timesheet you wish to view by clicking on it.

After selecting a timesheet, you can move backwards and forwards between other timesheets by using the green arrows. 

Print Timesheets

If you wish to print your timesheet, on the **My time** screen click on [Timesheets](#) on the left hand side of the screen.

Right click and select Print.



General Information

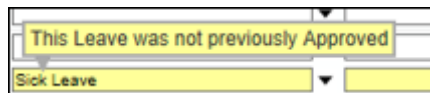
Alerts & warnings

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.



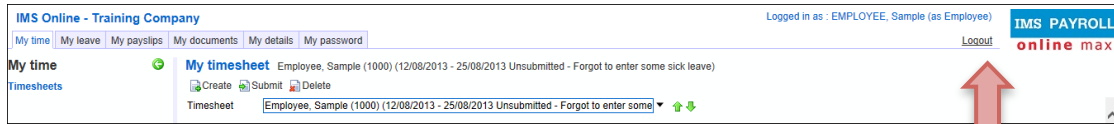
Warnings Definitions

Each organisation will have their own set of messages relative to them. The below table provides some generic warning messages that may appear.

Warning	Solution
Leave will be capped at Rostered/Standard Daily Hours	Warns that the leave hours will be capped at Rostered or Standard hours for that day. Would generally appear if entering more leave hours than you have been rostered for that day, unless your organisation allows you to take more leave than you'd be rostered for
Leave will not be deducted, Stat Holiday is payable instead	Advises that if a leave reason has been entered on a Public Holiday, no leave will be deducted, the day will be paid as a Public Holiday
No entitlement to Alt Day accrual	Advises you are not entitled to an Alternative Holiday for this particular Public Holiday shift
Overlaps with another entry on this day. Please edit or delete this entry	The start time on this time-band is before the end time on the previous time-band. Time-bands cannot overlap
Partial day hours may not be higher than Rostered/Standard Daily Hours	Reduce the number of hours for the partial day to be equal to or less than the Rostered or Standard Daily hours
Please enter a Start/End Time ending in 00, 15, 30, 45 min	The time has not been entered as a quarter hour unit

Logging out of IMS Online Max

Click on the Logout link on the top right hand side of the screen:



Do not click on the X in the top right corner of the screen.

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

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