https://resourcelink.carmarthenshire.gov.uk/dashboard/

ResourceLink Self Service Module

Members Guide

1 Introduction

Self Service is a web based module of the Authority's integrated HR/Payroll system, ResourceLink. The module allows Members to carry out tasks such as recording a change of address, submitting expenses claims or viewing a payslip online from their own PC direct to ResourceLink.

The system is easy to use and operates in a similar way as a banking website. Workflow technology and electronic authorisation is incorporated into the product meaning that traditional paper based payroll & personnel transactions can be performed with a click of a mouse.

2 Functionality

All Members of the Authority will have access to self service, which will include the following as part of the initial phase:

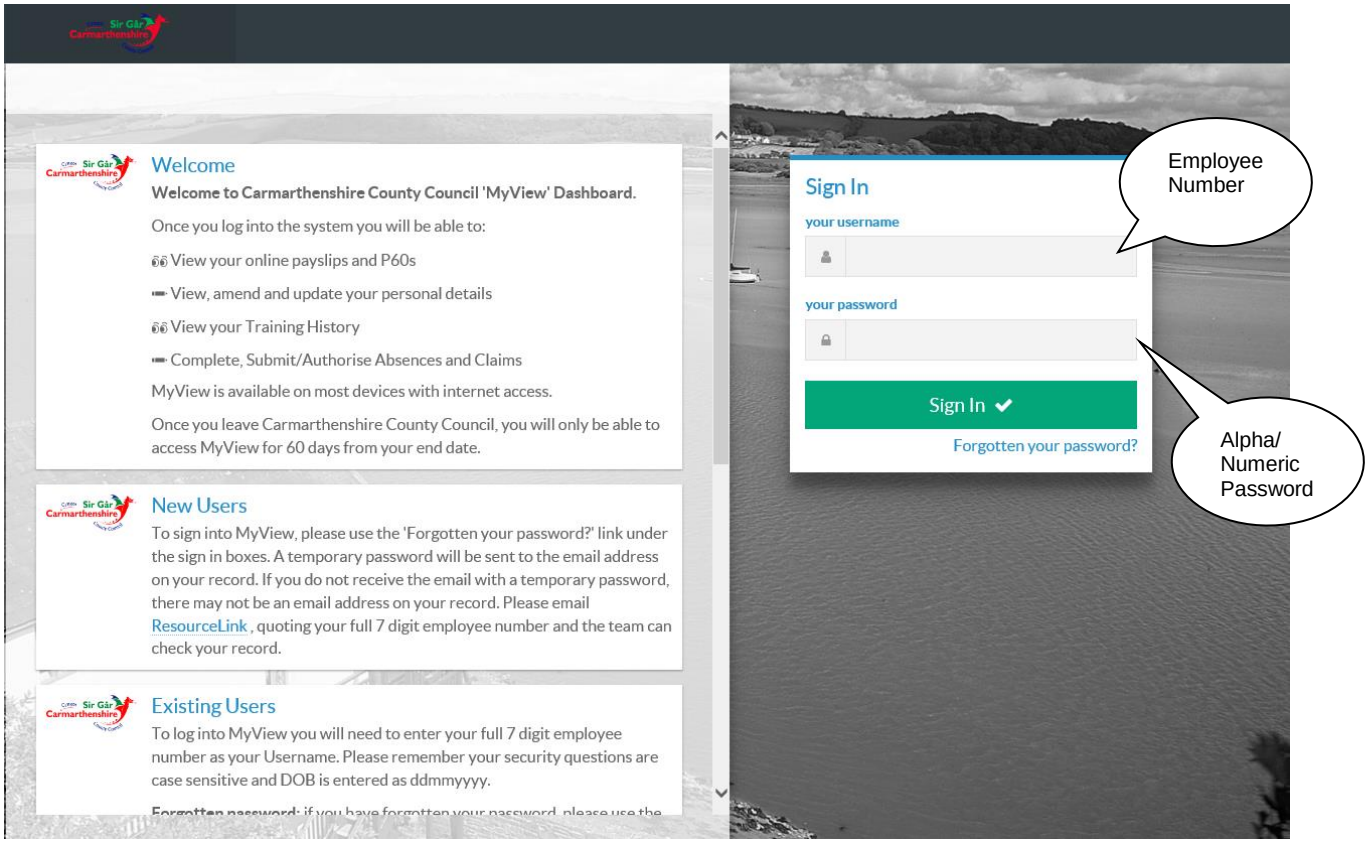
- Changes to personal addresses
- Changes to bank account details
- Changes to personal contact details
- On line access to payslips and P60 forms
- Travel and expenses claims

3 Accessing Self Service

The first time you login you will need to follow the instruction 'New Users' shown on the front screen. On receipt of a new password, via email, you will need to copy the password provided into the 'your password' box on the front page. Your username will always be your 7 digit employee number.

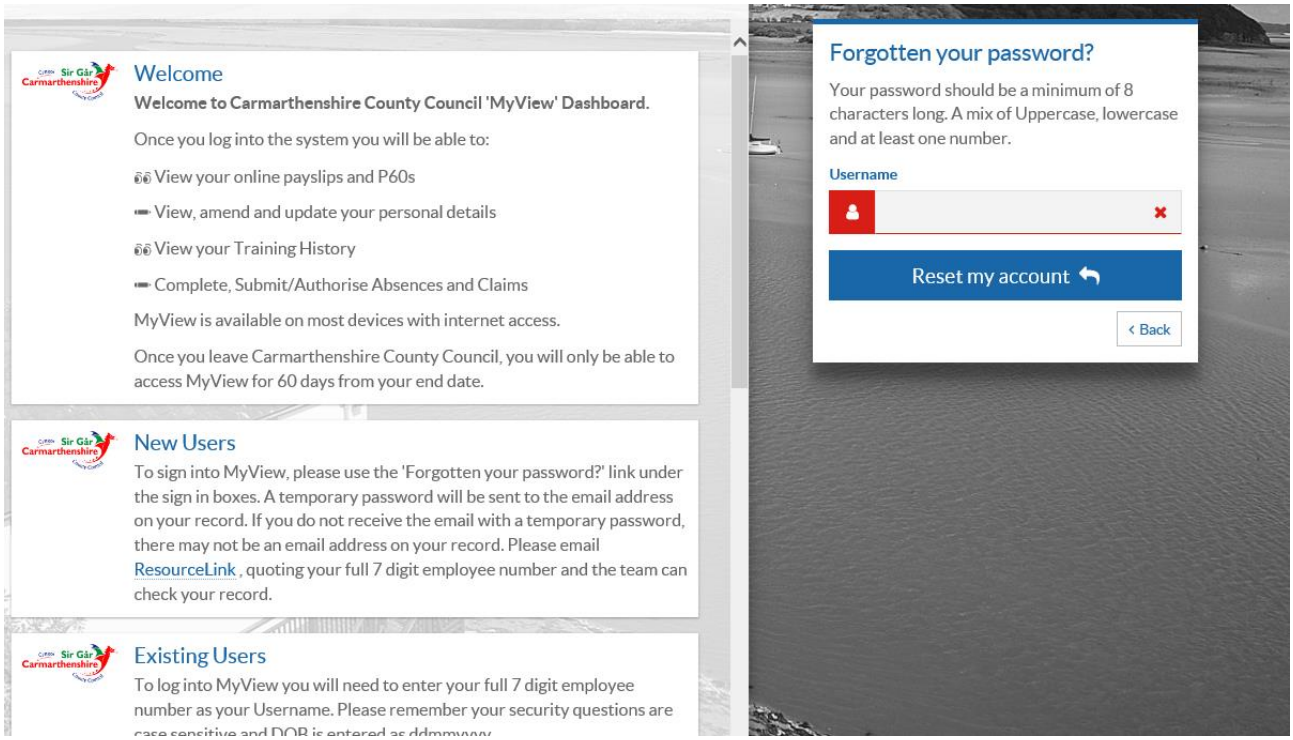
At this time a number of security questions are to be completed after which you will be asked to create a new password.

Once a new password is entered a confirmation message is displayed confirming that the password has been changed. On clicking the **continue** button you will be taken back to your login page.



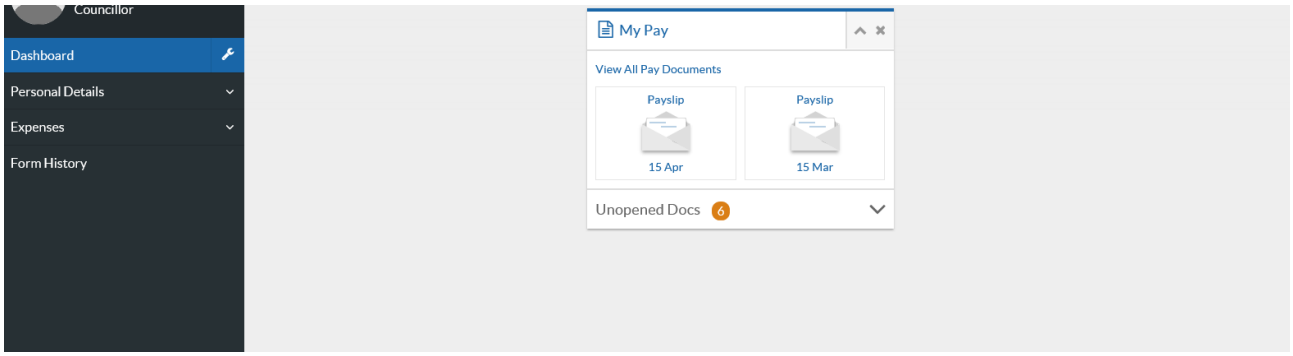
It must be noted that the password is case sensitive.

If at any time you have forgotten your password you can request a reminder e-mail to enable you to login by clicking on **forgotten password?** On entering your username (employee number) click **reset my account** and a confirmation message is displayed confirming that an e-mail has been sent with your new password. On clicking the **continue** button you will be taken back to your login page.



Self Service Modules

You can access each of the modules by clicking on the links on the left hand side of the screen.



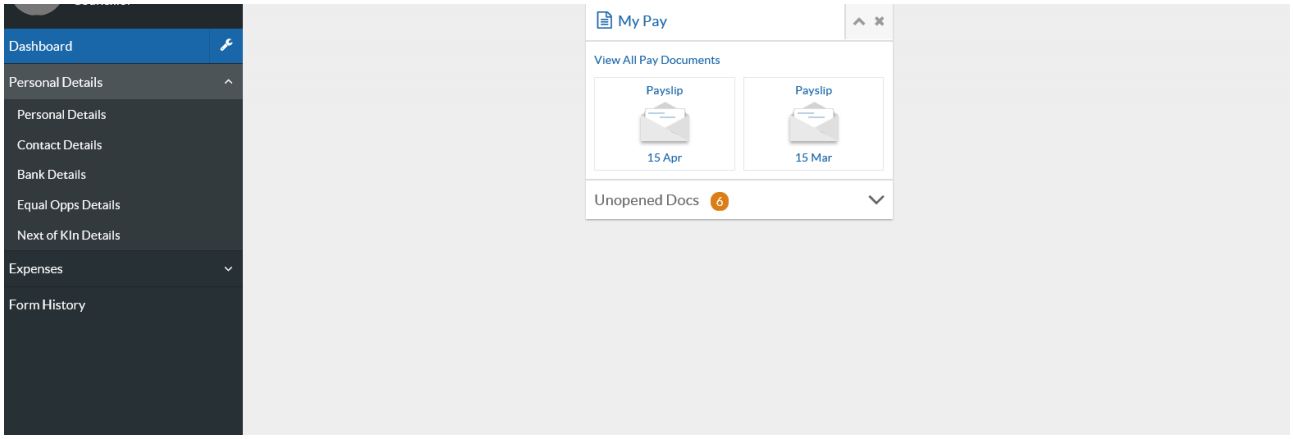
- ***My Personal Details***

This module enables you to amend your personal details held by the system. Personal details can be amended by using a series of standard forms, which update the information held on ResourceLink. The forms available are:

- Personal Details – enables you to amend your name, date of birth etc.
- Contact Details – enables you to amend your address and contact numbers.

- Bank Details – enables you to amend your bank and/or building society number
- Equal Opps Details – enable you to update your Equal Opps data
- Next of Kin Details – enables you to enter/change your next of kin details.

Users are required to check all their details and submit any amendments at the earliest opportunity.



To complete a Personal Details form online you are required to click on the relevant form and once it appears on screen click **edit these details** to amend the form.

Complete the form online with the relevant details and click **save** to save the form so that it can be checked before submission, or click **submit** to submit the form.

Once the submit button has been clicked the information is changed immediately on ResourceLink.

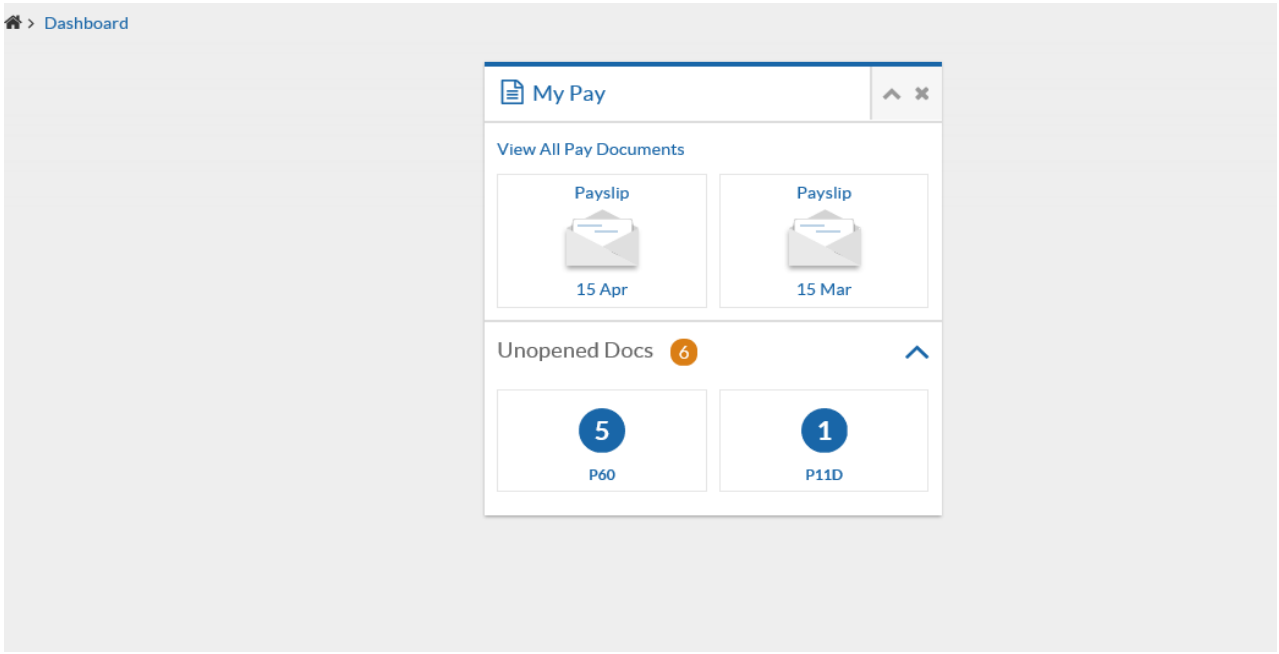
- ***My Pay (Widget)***

This module enables you to view current and historic payslips as well as P60's and P11D's.

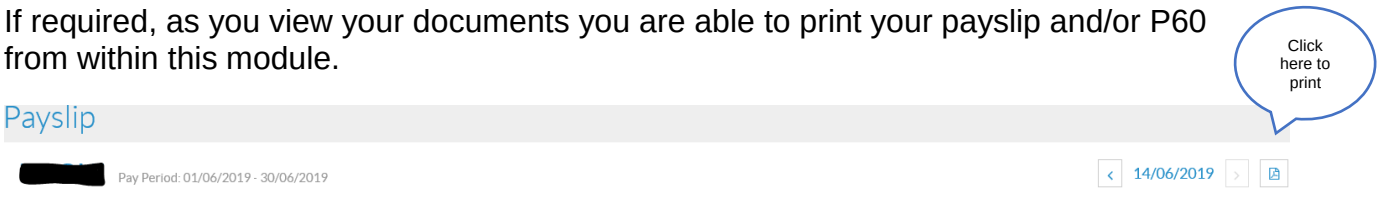
The page displays a list of available pay documents. Each payslip displays:

- Year/Period – the year and period to which the selected payslip applies
- Pay Date – the date on which the payment was made
- Run/Pay Type – the type of run, whether it was a standard run or a separate supplementary run and the pay type. For example, Std/M would be a standard pay

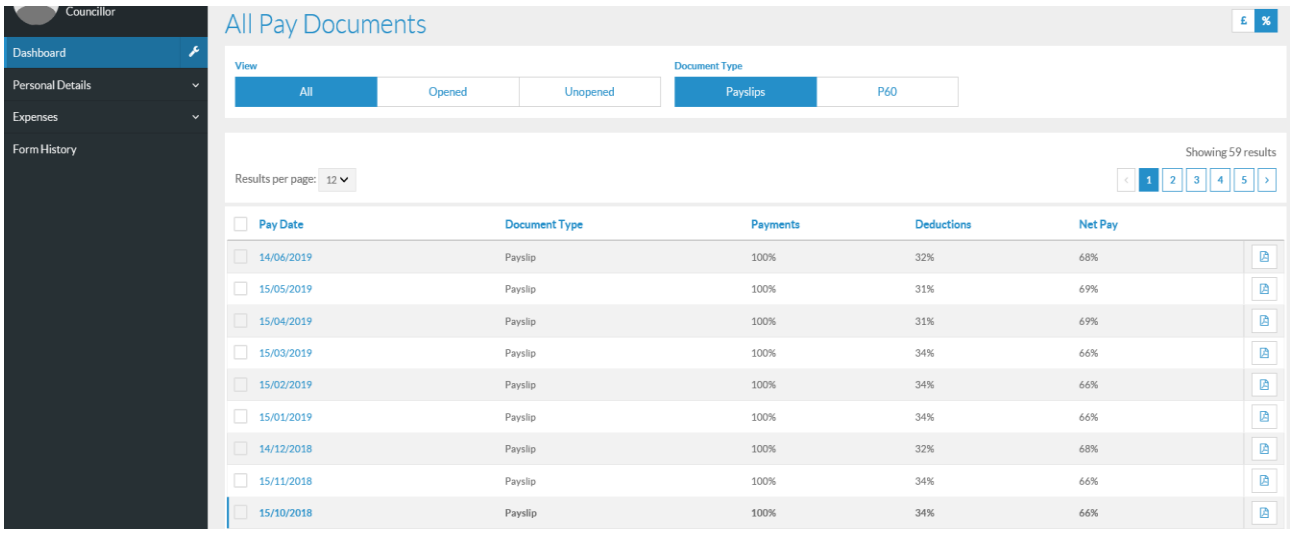
run, monthly pay.



If required, as you view your documents you are able to print your payslip and/or P60 from within this module.



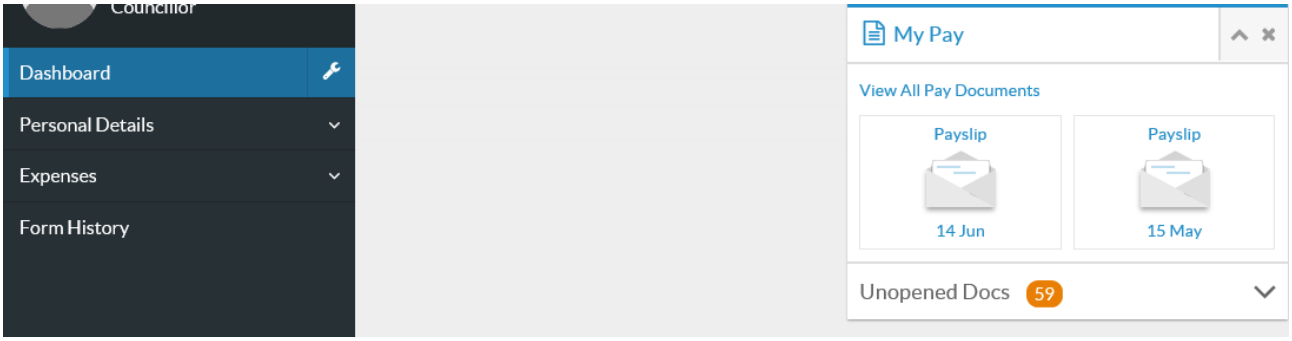
To Select a previous tax years payslips click on ‘View All Pay Documents’ and select the required date



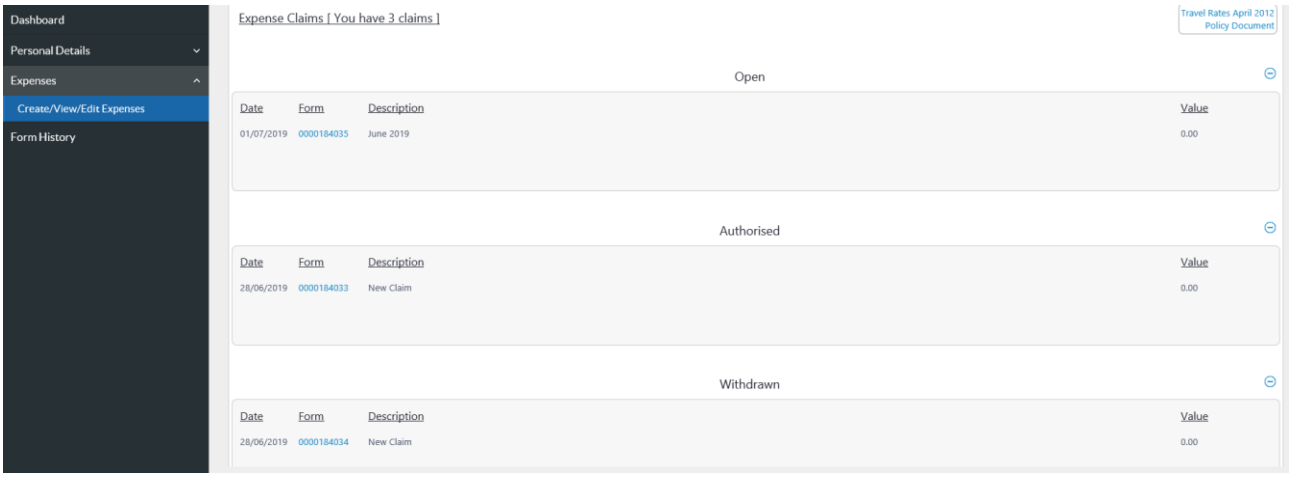
- ***Expenses Module***

The Expenses Module enables you to submit your Business Mileage and Expense Claims. Copies of previously submitted and approved claims entered through the Self Service Module are also held.

To create a claim, click on **Expenses** on the left of the Dashboard then **Create/View/Edit Expenses**:

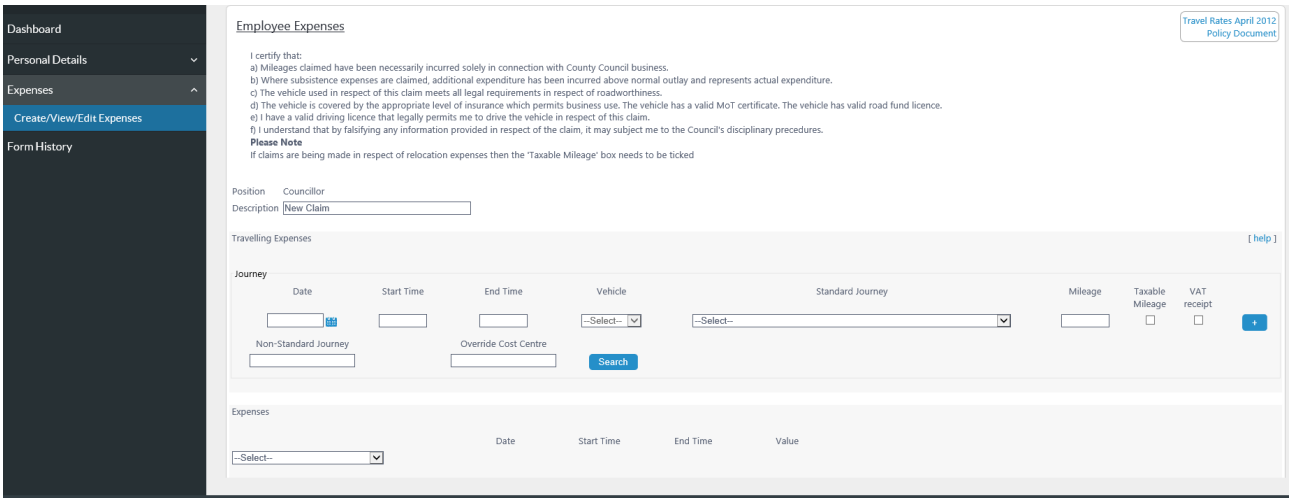


Any Open, Submitted or Authorised Claims will be displayed on screen.



To open a new claim, click on the Create New Claim button at the bottom of the screen, which will open a blank claim form:

Travelling Expenses



The **Description** field should be completed with the period of the claim e.g. September 2016, 01/09/2016 or a Date Range 01 – 30 September 2016.

In the **Travelling Expenses** section of the claim form each individual **Journey** must be completed with:

Date – the start date of the Journey, the date can be entered directly into the field in the format **ddmmyyyy** or the user can click on the calendar button next to the field and select the appropriate date, the system will automatically populate the date with slashes between the days and months.

Start Time & **End Time** fields are mandatory and be completed in the format **hhmm** in 24 hour format e.g. Start 0845 End 1645, the system will automatically populate a colon between the hours and minutes.

A generic **Vehicle** will automatically be populated with the users default vehicle e.g. MEM1200 etc.
NB. If this field is blank please contact the Payroll Section in order to add your vehicle details.

Standard Journey is only populated when you claim for a predefined journey which has been set up between the main Administrative Offices. These journeys have been created with a set mileage (AA rates). To select a Standard Journey click on the drop down arrow on the right hand side of the field and scroll through the list to select the appropriate journey. Once a journey is selected the Mileage field will be automatically populated with the appropriate number of miles.

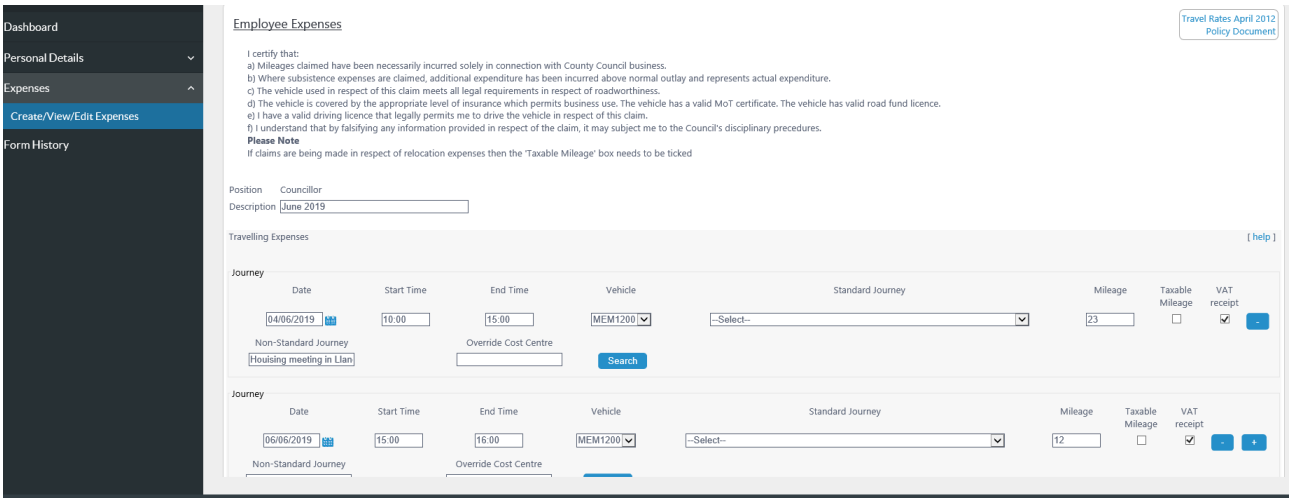
Mileage must be completed with the actual number of miles being claimed for a non-standard journey.

Non-Standard Journey is a mandatory field and is to be completed when claiming both **Non-Standard** and **Standard Journey's**. If a Standard Journey is selected then the Non-

Standard Journey field must be completed with the reason the journey was undertaken. If a Non-Standard Journey is selected then the Non-Standard Journey field must be completed with the reason the journey was undertaken and the routes taken.

Override Cost Centre can be left blank

If additional journeys are to be entered then you should click on the **[+]** button at the right hand side of the journey row to open an additional line.



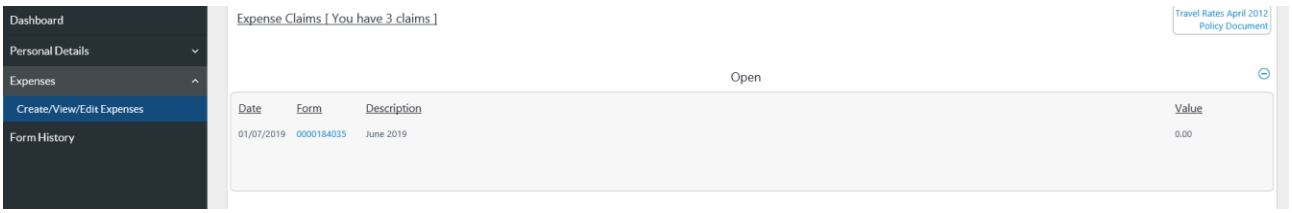
to delete a row the user should click on the **[-]** button to the right of the row to be deleted.

If no Expenses are to be entered then you can click on the **[Save]** button in the bottom right hand corner of the screen.

Once the claim has been saved a Confirmation Message will appear on screen, click on **[Continue]** to return to the Expenses Module front screen – new claims created will be displayed in the **Open** section.

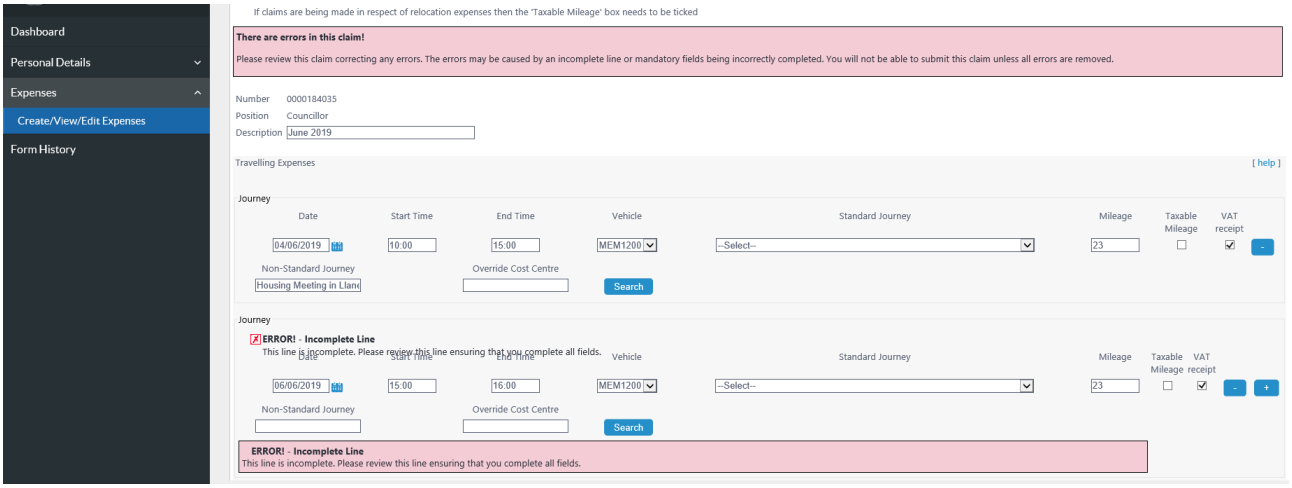
To Re-Open a Saved Claim Form

To re-open a claim, you can access your Claim Forms from the left hand menu and click on the bold **form number**. An Open claim can have additional items/adjustments made to it prior to submission.



Error messages highlight the problems within the claim form, in the example below the Non-

Standard Journey field has not been completed, therefore the row in error has an error box above and below it.

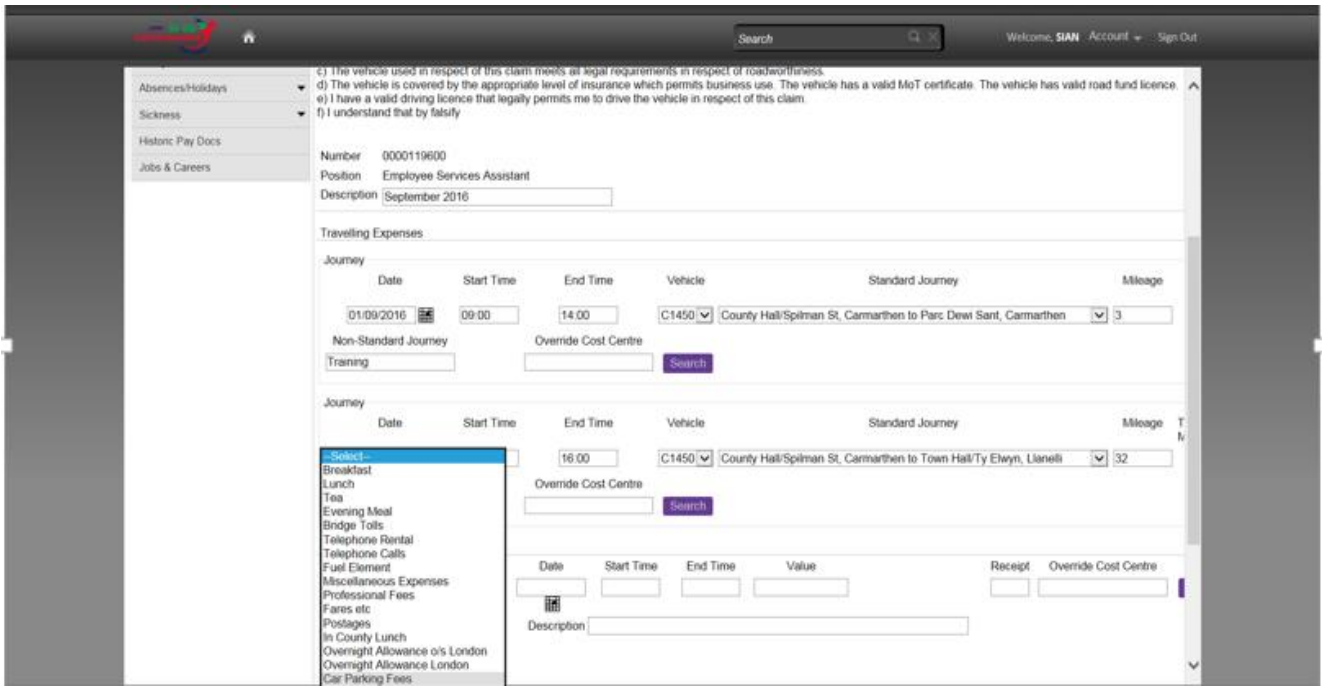


To remove the errors, complete the appropriate fields and then either click on the **[+]** button to create a new row or click **[Save]**.

Claims which contain errors cannot be submitted.

Expenses Section

The Expenses Section allows you to claim for allowable expenses. In the drop down menu, click on the expense to be claimed:



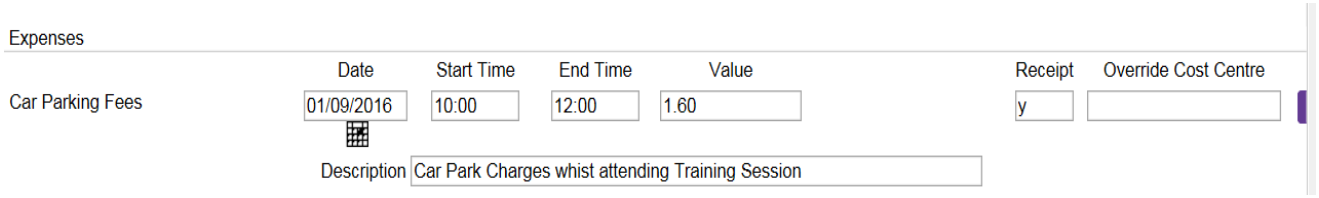
Date should be completed with the start date for the expense and is a <u>mandatory</u> field. You

can either enter the date directly into the field in the format **ddmmyyyy** or click on the calendar button below the date field to select the appropriate date.

Start Time and **End Time** fields should be completed with the appropriate times in the format **hhmm** and 24 hour clock. These are mandatory fields. When the item claimed is not date driven then the Start Time should be completed with 0000 and the End Time completed with 0001

Value must be completed with the amount being claimed for the expense item **N.B**. a decimal point must be entered between the pounds and pence.

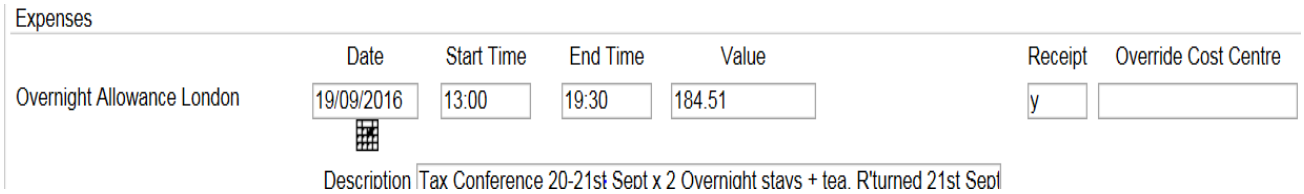
Receipt should be completed with a **Y** for certain expense claims e.g. Car Parking, Bridge Tolls, Taxi, Bus & Train Fares, Overnight Stays. A copy of the receipt must be submitted to the authorising officer once the claim is submitted.



Description is a mandatory field completed with the purpose/reason for the claim.

To add more than one expense item to the claim click on the expense drop down to select the additional item.

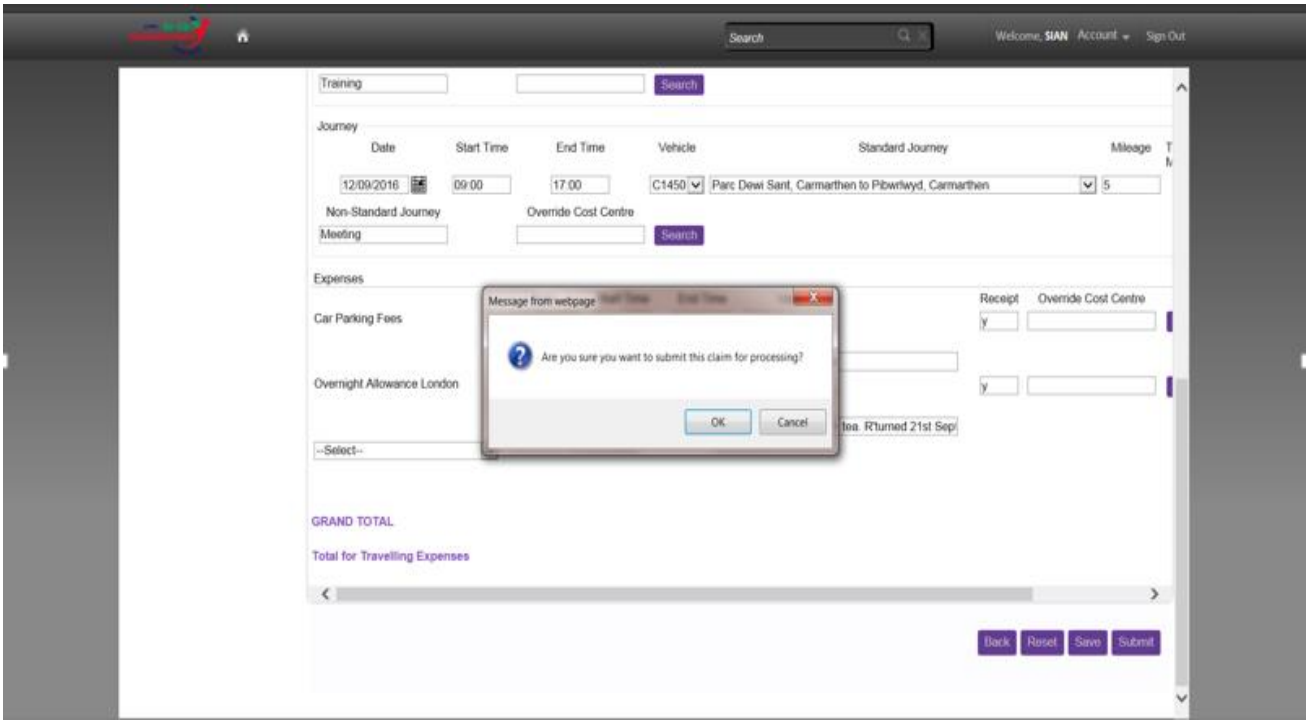
Overnight Stays: in order to simplify claims for overnight stays only one entry is required for each stay e.g. an officer attends a conference in London over three days. The Start Date should be completed with the first date of the conference and a detailed description then entered into the Description field e.g.



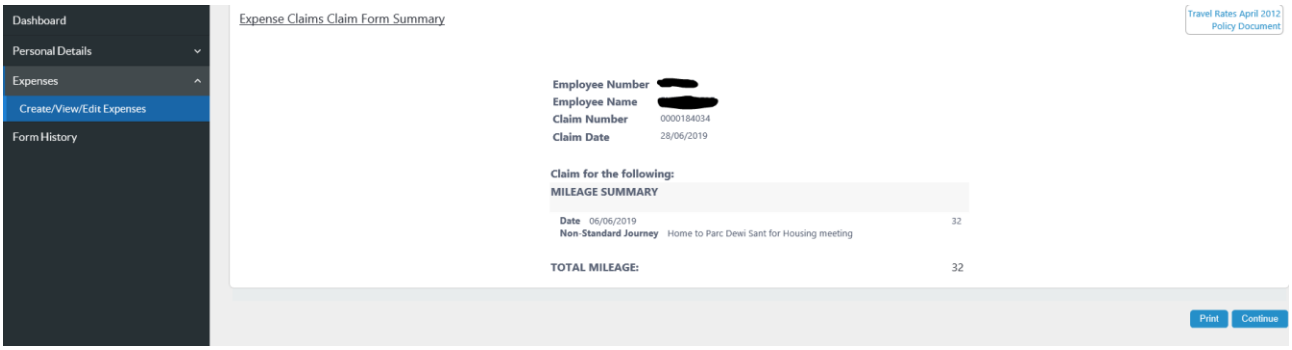
Submission of Claim for Payment

Once all items have been added to the claim you can click on the [**Submit**] button in the bottom right hand comer of the screen.

Click **OK** to proceed to send the claim to the designated Authorising Officer



The Claim Summary Report is displayed on screen and must be printed in order to attach all relevant receipts, including fuel VAT receipts to pass onto the Authorising Officer.

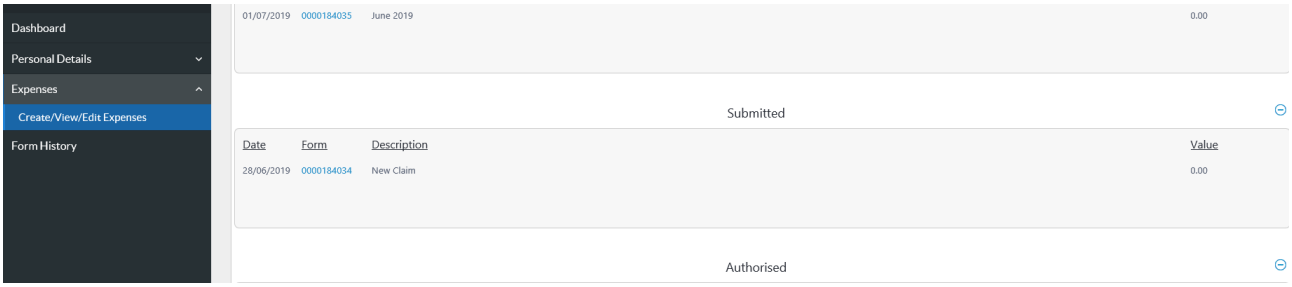


Click [**Print**] at the bottom right hand corner of the screen and then click [**Continue**].

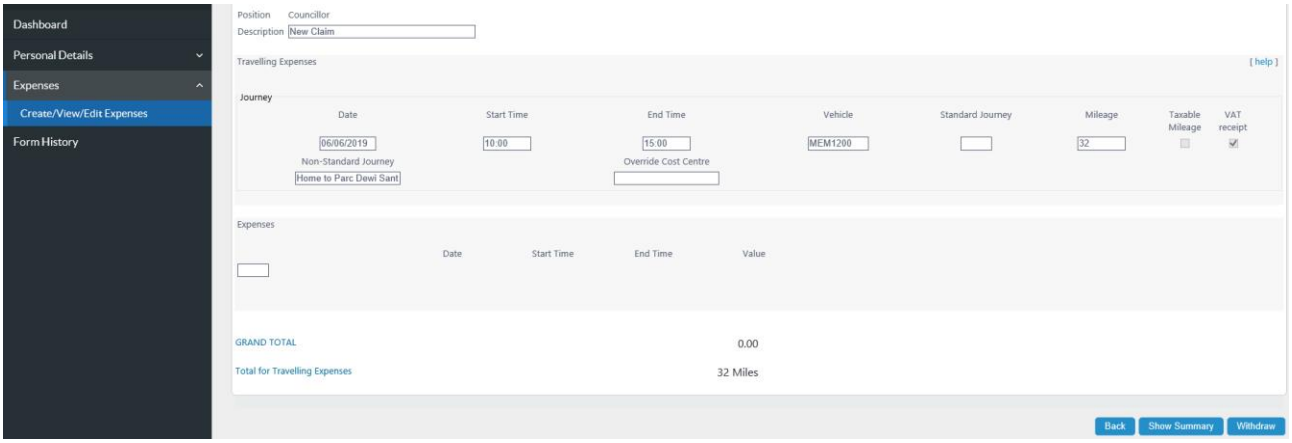
Withdrawing Submitted Claims

If a claim is submitted in error then it can be **Withdrawn** prior to Authorisation:

Click on the **Form Number** of the claim to be withdrawn in the Submitted Section

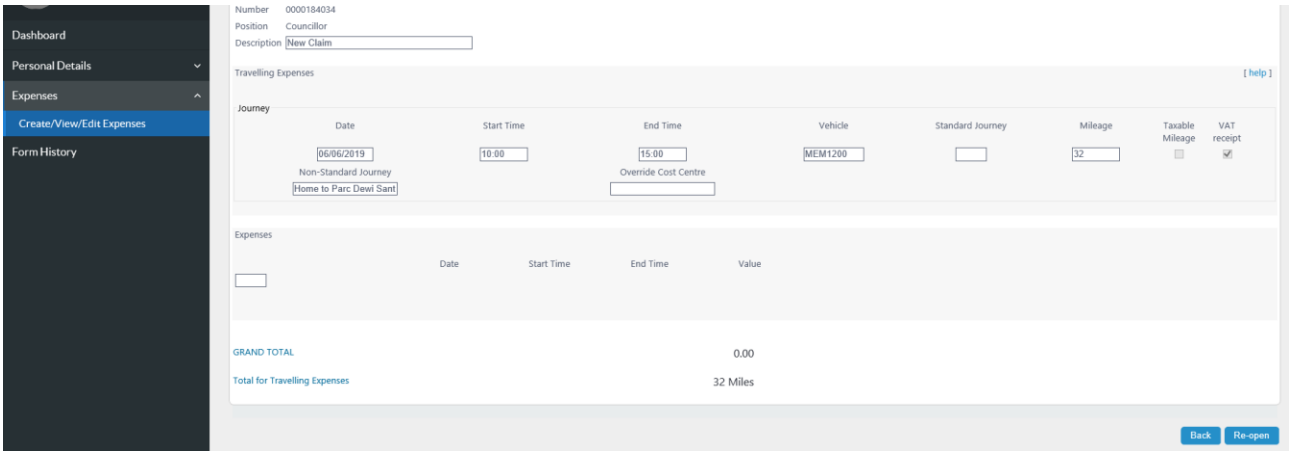


Click on [**Withdraw**] in the bottom right hand corner of the screen.



The Withdrawn claim is then displayed in the Withdrawn Section of the Expense Claim screen:

To make adjustments to this claim, click on the bold form number and then click on the [**Re-Open**] button in the bottom right hand corner of the screen.



The Claim Form will then be moved back to the Open Section where it can be opened and any necessary adjustments made prior to re-submission.

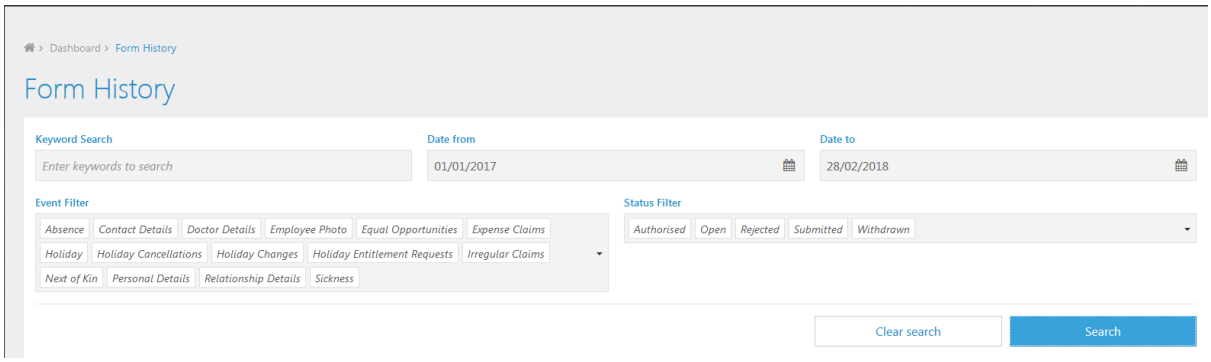
- ***Form History***

The Form History module allows you to view the progress of any form which has been created/submitted for/by you.

When you initially open the Form History screen, all forms which are Authorised, Open, Rejected, Submitted or Withdrawn will display:

The Description displays the form name, your name and the dates requested (if a leave/absence request). The Event is the form type. Status displays the 'current status' of the form and the Raised Date is the date the form was last updated.

You can reduce the number of forms displayed by setting filters or searching by Keywords:

Type the work you would like to search for in the Keyword Search and then click the Search button. Anything that matches your keyword search will display below in the Results page.

To search for forms submitted/actioned between/from a date enter the Date Form and if required the Date to field.