

My Visma

- Guide for managers

Visma Enterprise



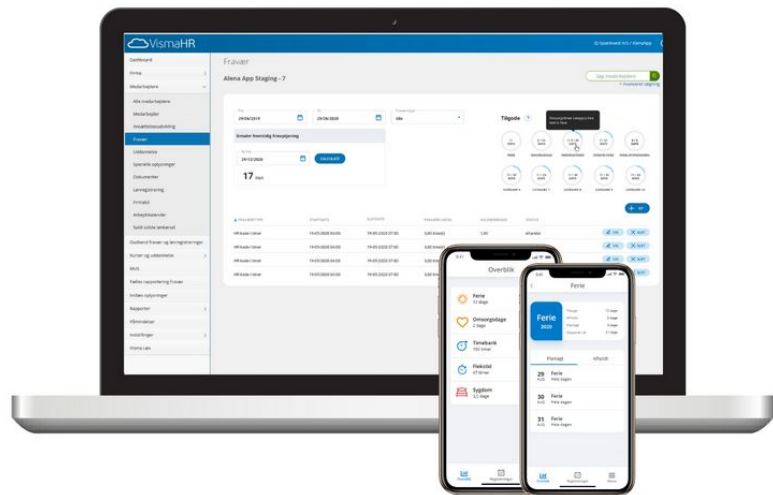
About the guide

How to use the guide

This guide is divided on the menu items, that you as a manager have access to. [You can find an overview of the menu items on the next page.](#) You can also choose to do a lookup [in the back of the guide in the table of content, where all subjects can be found in alphabetical order.](#)

The guide is interactive - which means that it is possible to click on selected content and go to the selected subjects. Look for this sign '>>', or underlined colored text. It is also possible to watch video-guides in relation to some of the subjects.

If you get lost you can always press the button(s) in the top right corner and either start over in the main menu or just go back to the frontpage for menu items where guides for its content can be found.





Introduction

Welcome to My Visma

My Visma is **your** access and **your** tool to deeper insight into the data that is relevant for just **you**.

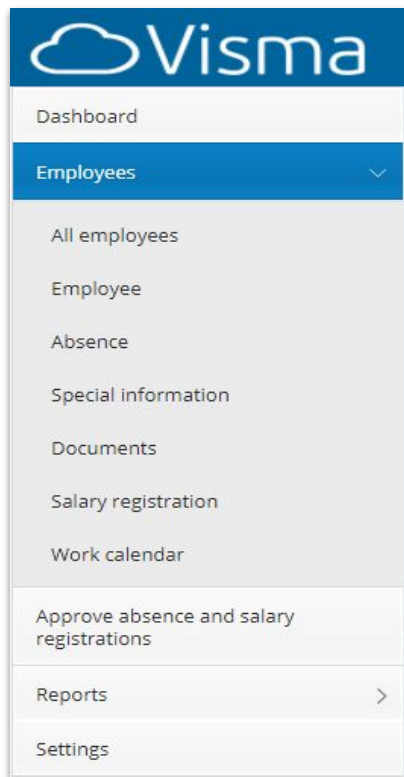
As a manager you get a better overview of your employees data and registrations. This means that you can check out information such as salary, absence and sick leave for the employees you have access to.

With Self Service it is also possible to approve registrations and do registrations on behalf of your own employees.*

Enjoy!

* Requires additional purchase of Self Service

Main menu - Manager access



Dashboard >>

Provides an overview, easy search feature, dashboard, relevant links, notifications on birthdays and hires and terminations.

Employees >>

Menu item with sub-categories all personnel administrative data can be accessed.

All employees >>

Provides a quick overview of all the employees in the department.

Employee >>

Master data, employment data, statistics and next of kin for the employees in the department..

Absence >>

Overview of all your employees absence registrations and balances. The possibility to register absence on behalf of your own employees.*

Documents >>

Company car and handed out effects.

Special information >>

Company car and handed out effects.

Salary registrations >>

Reports >>

Reports, with the possibility to adjust ,which can be created in Excel format and some in PDF format..

Settings >>

Set up of your own My Visma-account.

* Requires additional purchase of Self Service

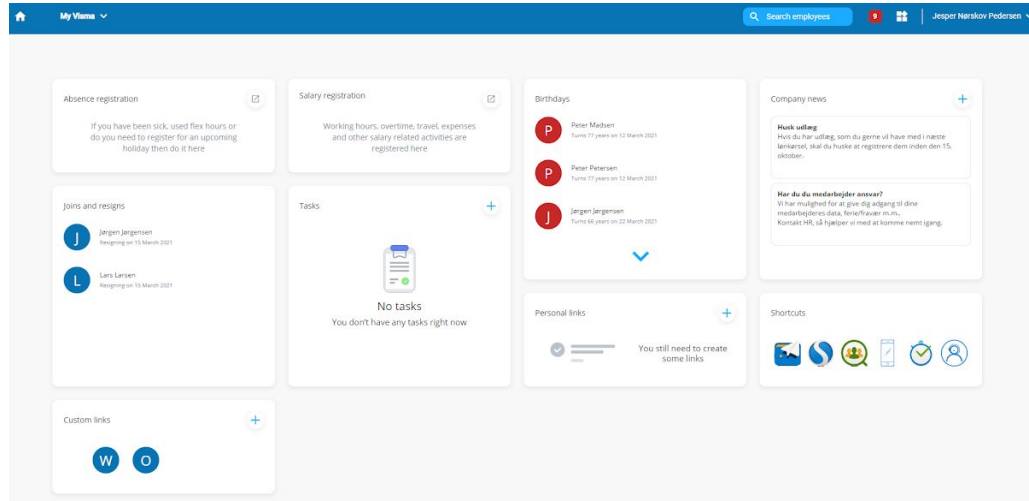


Dashboard

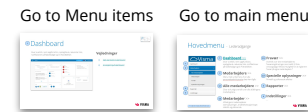
Provides an overview, easy search feature, dashboard, relevant links, notifications on birthdays and hires and terminations.

Guides

- Make dashboard your homepage>>
- Adjust your dashboard >>



Dashboard




Make dashboard your homepage

The Dashboard makes it easier for you to access your most frequently used features in My Visma. At the same time, you get a simple search feature of employees and a shortcut to all your Visma systems. This is why we recommend you to set up the dashboard as your homepage.

1. In the left menu you will find 'Settings'
2. On the 'Frontpage' click on 'Dashboard'
3. Press 'Save' in the top right corner.

Adjusting the dashboard

The dashboard can be adjusted as you wish. This is how to deselect any preselected screenings:

1. Click on  in the top right corner. Here you can select and deselect shown modules.

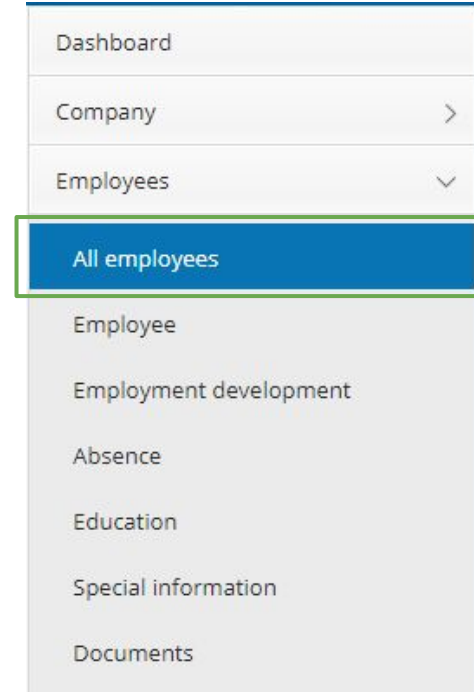


Employees

Menu with subcategories where all personnel administrative data can be accessed.

Guides

- All employees >>
- Employees >>
 - The Employee tab>>
 - The Employment tab >>
 - The salary, pension and benefits tab >>
 - The Statistics tab >>
 - The relatives tab >>
- Absence >>
- Approve absence and salary registrations* >>
- Salary registrations*
- Special information >>



* Requires additional purchase of Self Service

Employees

All Employees

Here you can find an overview of all employees in your department. A specific employee can be accessed in tree different ways:

- Click on the row with the employees name
- Use the search box 'Search for employees' (Type in employee name or employee number)
- Click on 'Advanced search'

Go to Menu item



Go to main menu

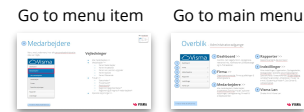


Employees

Employee

Here you can find all information on a specific employee. The data is divided into five different tabs:

- Employee
- Employment
- Salary, pension and benefits
- Statistics
- Relatives



Hans Hansen - 30

Employee Employment Salary, Pensions and Benefits Statistics Relatives Future payslip

Company	80 Maj 2017	Employee no. *	30
Employer	1 Dania Holiday A/S	SSN	1409459991
Hired date *	01/09/2008	CVR-no.	
Salary seniority date	01/09/2008	SSN abroad	
With payroll	<input checked="" type="checkbox"/>	Salary seniority	12 years 6 months 4 days

First name *	Hans	Birth date *	14/09/1945
Surname *	Hansen	Gender *	Male
Initials		Birth country	(none)
Calling name		Citizenship	(none)
Address *	Skolevej 14	Salary paid through	<input type="radio"/> NemKonto <input checked="" type="radio"/> Bank account
		Bank account	1103 8035601814
Country *	Denmark	Payslip to e-Boks	<input checked="" type="radio"/> Yes <input type="radio"/> No
Zip-code *	2610 Rødovre		
	Additional addresses		
Phone	Additional phone numbers		
E-mail address			
Private e-mail address			

Employees

Go to Menu item



Go to main menu



The Employee tab

Here you can find the employees master data.

The Employment tab

Here you can find all information about the employees employment. In the top of the screen a box for controlling the employment periods is shown.

The salary, Pension and benefits tab

In the salary, pension and benefits tab you can find the fixed salary, pension etc., that the employee receives every month. In the top of the screen to the left a box with periods for salary adjustments is shown.

The screenshot is divided into the following salary types:

- Salary
- Pension
- Deduction
- Benefits
- Comments

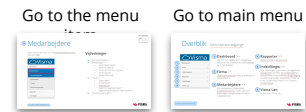
Hans Hansen - 30

Employee | Employment | Salary, Pensions and Benefits | Statistics | Relatives | Future payroll

Company	80 May 2017	Employee no. *	30
Employer	1 Dania Holiday A/S	SSN	1408459991
Hired date *	01/09/2008	CVR-no.	
Salary seniority date	01/09/2008	SSN abroad	
With payroll	<input checked="" type="checkbox"/>	Salary seniority	12 years 6 months 4 days

First name *	Hans	Birth date *	14/09/1945
Surname *	Hansen	Gender *	Male
Initials		Birth country	(none)
Calling name		Citizenship	(none)
Address *	Stolevej 14	Salary paid through	<input checked="" type="radio"/> Hans Hansen <input type="radio"/> Bank account
Country *	Denmark	Bank account	1109 8035601814
Zip-code *	2610 Rødovre	Payslip to e-Boks	<input checked="" type="radio"/> Yes <input type="radio"/> No
Additional addresses			
Phone	Additional phone numbers		
E-mail address			
Private e-mail address			



Employees



The statistics tab

Here you can find information if the company reports to statistics and the information have been filled out.

The screenshot shows the 'Statistics' tab selected in the top navigation bar. Below the navigation bar, there is a table with the following data:



Ip-type	Ip-code	Value	From	To	
300 Arbejdsfunktion	341540 Salg af lastbiler og andre erh		01/09/2008	31/12/2011	 

Below the table, there is a button labeled 'Add statistics'.

The relatives tab

In the event of an emergency in the workplace it can be very useful to have contact informations registered for the employees relatives.

The screenshot shows the 'Relatives' tab selected in the top navigation bar. Below the navigation bar, there is a table with the following data:

Relative	Name	Phone	Email	
Wife/Cohabitant	Sarah	+4511223344	my@mail.com	 

Below the table, there is a button labeled 'Add more relatives'.

Employees

Absence

This is where already registered absence for an employee will be shown. It is also in this menu item you can register absence on behalf of yourself or your employees.

Status codes*

Companies that has Self Service, can see the status codes on each absence registration. The status codes show where in the process the individual registration is:

- Pending – The registration is waiting for manager approval
- Approved - The registration has been approved by the manager and is ready for payroll processing
- Rejected - The registration has been rejected by the manager
- Processed – The registration has been processed in the payroll.

To be continued on the next page

* Requires additional purchase of Self Service

Go to menu item



Go to main menu



Employees

Go to menu item



Go to main menu



...After the creation, the registration will automatically be assigned the status "Pending". The employee can edit or delete the registration as long as it has not been approved.

When a manager approves the registration, it will be processed for payroll. The employee cannot edit or delete approved registrations. This can only be done by the administrator.

If a manager rejects a registration it is shown with the status "Rejected". The employee can see a 'Rejection comment' by clicking on "Edit". In the row for the registration the employee can now edit and delete the rejected registration by using the symbols for edit/delete on the right.

Absence

Hans Hansen - 30

Search for employees [Advanced search](#)

From: 05-12-2020 To: 05-03-2022 Absence type: All

Simulate future vacation ?

By the: [Calculate](#)

Balances Show the old balances

0 DAYS SENIOR DAYS 0 DAYS CARE DAYS 0 HOURS FLEX 0 HOURS TIMEBANK 0 DAYS HOLIDAYS

+ NEW

ABSENCE TYPE	START DATE	END DATE	ABSENCE NUMBER	STATUS	COMMENT
40 Vacation	12-04-2021	16-04-2021	5 day(s)	Pending	

Items per page: 10 1 - 1 of 1

* Requires additional purchase of Self Service

Employees

Go to Menu item

Go to Main menu



Absence registration*

1. Click on the button 'New'
2. Select 'Absence type' in the dropdown-menu
3. Fill in start- and end date
4. The "absence quantity" will automatically be filled out in accordance with the company's absence calendar
5. 'Calendar days' will automatically be filled out
6. If the absence is registered as hours it will also be possible to fill out the amount time you have been absent
7. It is possible to fill out a 'Remark'
8. Finish by clicking 'Save'.

New absence - Hans Hansen - 30 - Active

Absence code
Select absence code

From: ex. 17-12-2020 To: ex. 17-12-2020

Absence number: 0 Calendar days: 0 days

Comment

CANCEL SAVE

As a manager you can register absence on behalf of your employees.

*Requires additional purchase of Self Service

Employees

Absence balance

In the top of the screen you can find a filter for displaying the registered absence - either for a certain type of absence or for a certain period of time.

From: 05-12-2020 To: 05-03-2022 Absence type: All

Simulate future vacation ?

By the: 15-07-2021

8,32 days, 61,64 hours

CALCULATE CLEAR

Simulate future time off

Here, you can fill in a date and get a calculation of how many statutory vacation days (2,08 per month), you can take on a given date. The calculator will not take planned and used holiday into account when calculating.

Balances

In the circles to the right you can see your own or your employees' balances. Your administrator can setup the displayed balances for all employees.

Absence

Hans Hansen - 30

From: 05-12-2020 To: 05-03-2022 Absence type: All

Simulate future vacation ?

By the: [] CALCULATE

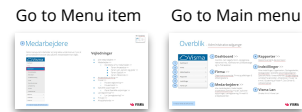
Balances

8 DAYS SENIOR DAYS 8 DAYS CARE DAYS 0 HOURS FLEX 5 HOURS TIMEBASE 0 DAYS HOLIDAY...

NEW

ABSENCE TYPE	START DATE	END DATE	ABSENCE NUMBER	STATUS	COMMENT
AD Vacation	12-04-2021	16-04-2021	5 day(s)	Pending	

Items per page: 10 1 - 1 of 1



Employees

Approve absence and salary registrations*

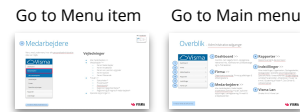
In this menu item you can approve absence and salary registrations for your employees. Please note that there are two tabs, one for registration of salary and one for registration of absence .

Select the rows you wish to approve and click on 'Approve selected'. The registrations will afterwards be transferred to the payroll system and processed in the next payrollin.

When approving salary registrations please be extra aware of mileage registrations.

It is mandatory and a demand from the tax authorities to fill out the box 'Remark', with the registration number of the car, and where the drive was made to and from, and the purpose of the trip. If this have not been filled out correctly you should reject the registration.

* Requires additional purchase of Self Service



Approve absence and salary registrations

Salary registration Absence

Employee no: Employee name:

From date: To date:

Absence type: <show all>

☐ Danish Holiday Act (Company)

☐ Administration

☐ Customer Care

☐ Finance

☐ Freelance

☐ Production

☐ Purchase

☐ Sales

Employee no	Employee name	Absence type	Start date	End date	Start time	End time	Absence number	Rate	Remark	Status	<input type="checkbox"/>	<input type="checkbox"/>
55566331444	Jens Overgaard	13 Barn syg	25/02/2021	25/02/2021			7.50	hour(s)		Pending	<input type="checkbox"/>	<input type="checkbox"/>
30	Hans Hansen	45 Vacation	12/04/2021	16/04/2021			5.00	day(s)		Pending	<input type="checkbox"/>	<input type="checkbox"/>
55566331444	Jens Overgaard	60 Feriehøjde	02/03/2021	09/03/2021			6.00	day(s)	Ferie i sommerh...	Pending	<input type="checkbox"/>	<input type="checkbox"/>

Total registered in the period: 13 Barn syg 7.50
45 Vacation 5.00
60 Feriehøjde 6.00

Approve selected

Employees

Salary registrations*

You can also do salary registrations on behalf of yourself and your employees. Once again, please be aware that the responsibility for salary registrations usually is the individual employee's. Therefore, you are only supposed to do the salary registrations if the employee is prevented from doing it.

Go to menu item



Go to Main menu



Salary registration

Hans Hansen - 30

Search for employees Advanced search

Show salary registrations

Period: To:

Salary registration type:

Show 15

Salary registration type	Date	Number/Amount	Base	Project	Remark	Settlement	Status	Reject comment
1553 - Bonus	01/09/2018	500.00 Amount					Processed	
400 - Overlever satst fra år 1	01/09/2016						Processed	
4400 - Privatgjelds utbetaling	01/12/2015						Processed	

*Requires additional purchase of Self Service

Employees

Go to menu item



Go to Main menu




Documents*



In the menu item “Documents” you can see any documents that have been uploaded through a salary registration. Please, see example below.

Documents

New

Search for employees 

> Advanced search

Category ^	Document	Comment	Uploaded	Uploaded by	Size	
Contracts	Employee Contract.docx	Employee Contract	05/03/2021	861-31145-jesper Narskov Pedersen	11.0 KiB	 

*Requires additional purchase of Self Service

Employees

Go to menu item



Go to Main menu




Special information

The menu item “Special Information” is used to see extra registered information on your employees.

If you administrator ex. has registered handed out effects, you will be able to see it here.

Special information

Search for employees  [Advanced search](#)

Julie Hansen - 4

Arbejdstej Aviser Bil Certifikater Firmabil HR IT IT - Computer IT - Mobiltelefon IT - Tablet Kompetencer (faktisk) Kompetencer (ønsket)

Noter Offboarding af medarbejder Økonomi Onboarding af medarbejder Refusioner - sygdom Samtaler Sprog Tidsregistrering Udliveredede effekter

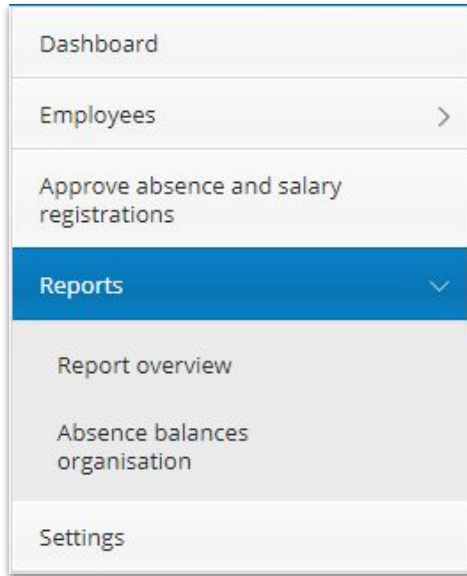
Visma Enterprise Miscellaneous

Only show active special information ☒



Reports

Here, you will have access to a variety of standard reports, which can be set up to open in Excel and some in pdf.



Guides

- Overview of reports >>
- Download reports and edit setup >>
- Absence balances organisation >>

Reports

Go to menu item



Go to Main menu



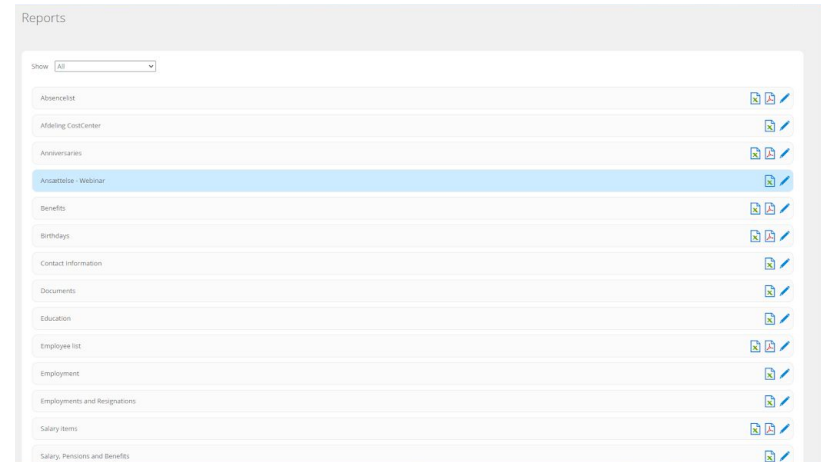
Report overview

Reports with standard setup:

- Absence list
- Jubilees
- Birthdays
- Employee list
- Inflow and outflow list
- Salary registration report*
- Seniority list

Reports with the possibility to change the setup:

- Salary, pension and benefits
- Employment list
- Phone list



Reports

Go to Menu item



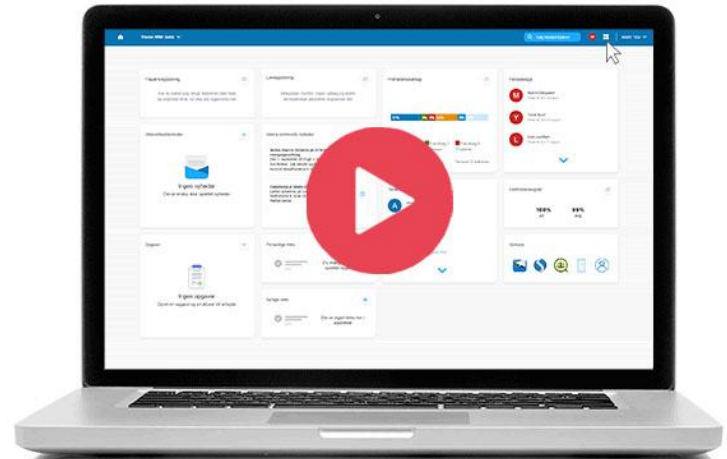
Go to Main menu



Download reports and edit setup

1. Click on the edit pen to the right of the selected report
2. Here, you have the possibility to define what you want to see. You can do this by clicking on 'add/remove columns', and subsequently click on the information you want displayed in the report.
3. If you do not select any departments, employment type etc. below, all departments will be displayed in the report.
4. Download the report by clicking on 'View report' In the top left corner.

See how by clicking on the play button



Reports

Go to Menu item

Go to Main menu



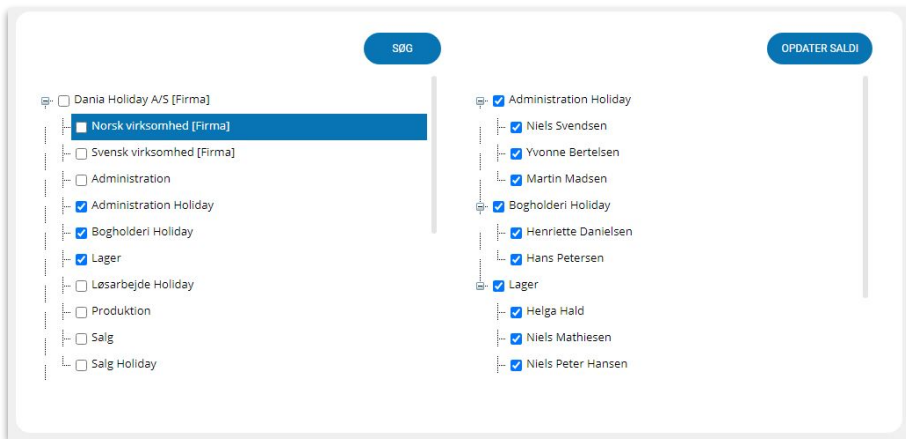
Absence balances organisation

This report is used for getting a complete overview of how much holiday, time off, etc. the employees in a department are owed.

This is how to create the report:

1. Mark the relevant department
2. Click on 'Search'
3. The employees will be shown on the right side – deselect the employees you do not want to see in the report
4. Click on 'Update balances'.

The result will be shown in the bottom of the page and can also be exported to Excel.





Settings

My Settings

Miscellaneous settings:

Here, you can choose English or Danish as your preferred language. In the box "Homepage" you can select the menu item you want My Visma to open on when you log on to the system. "Adjust pages" to this height : 768 pixels is recommended.

Employee search:

In the box "Default search feature" you can set up the search criteria you usually use when you search for employees.

My settings

Misc. settings

Choose language: English

Start page: Dashboard

Adjust pages to this height: 768 pixels

Employee search

Auto hide: ☒

Company: All

Default search field: Employee no

Default search value:

Organisations

Change organisation: Demo Salg M/E

