

My Visma - Guide for employees

Visma Enterprise



About the guide

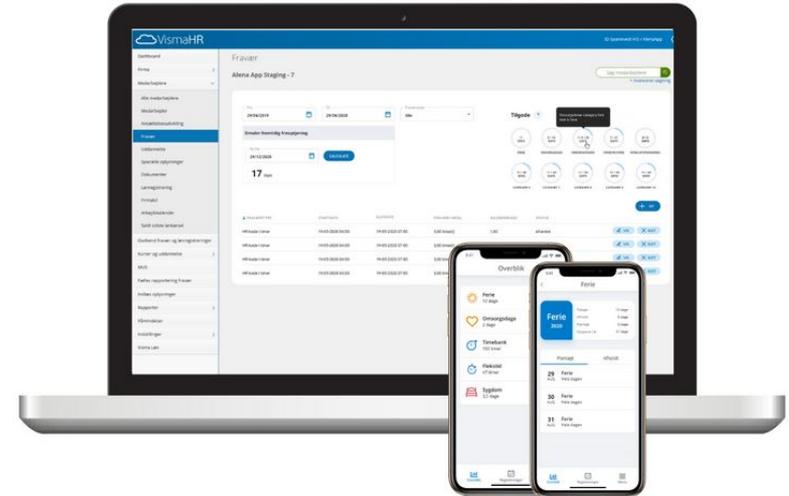
This is how to use the guide

This guide is for My Visma and Self Service. The guide is divided in to the menu items you as an employee have access to.

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.

[See the menu items you as an employee have access to in the web portal here.](#) 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.](#)





Introduction

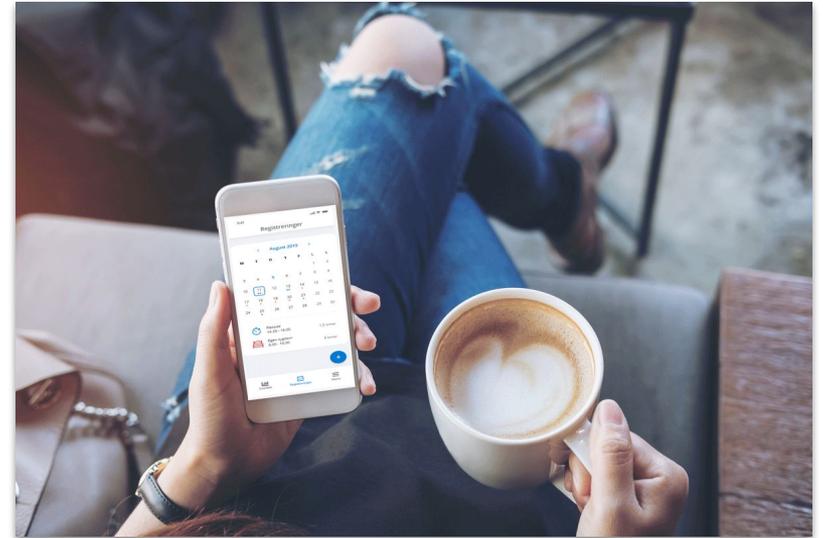
Welcome to My Visma

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

As an employee you always have access to the My Visma app and the web portal.

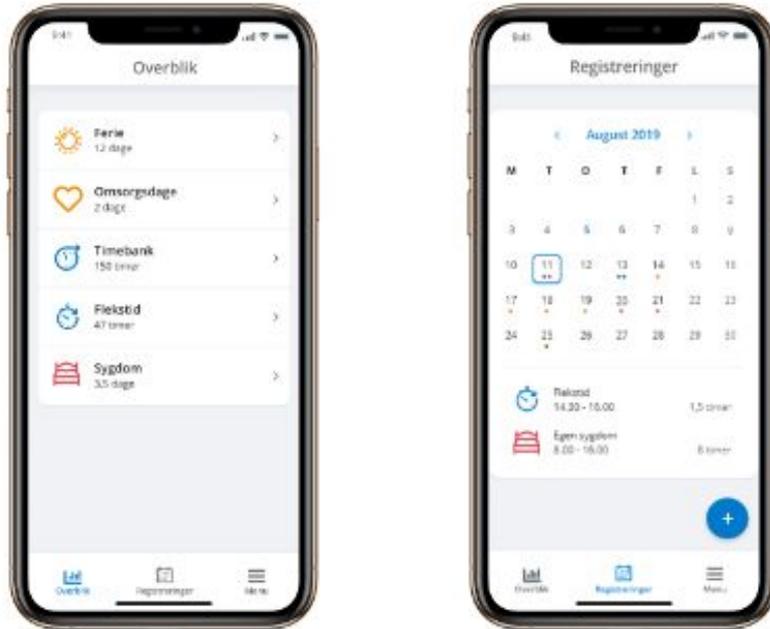
Access to My Visma:

- App >>
- Web portal* >>



* Requires additional purchase of Self Service

The My Visma App



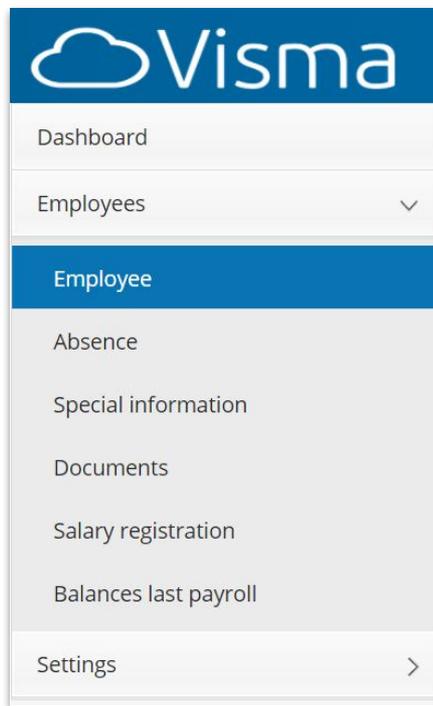
The My Visma App

Is a free app that can be downloaded in App-store or Google play. As an employee you have the possibility to see your own balances for e.g. absence and holiday. You can also request holiday or register your absence.

Possibilities in the app

- See how much holiday you can take
- Request holiday
- Report sickness or other kinds of absence

Web portal



Dashboard >>

Provides an overview, easy search feature, dashboard & relevant links.

Employees >>

Menu item with sub-categories, where your personnel administrative data can be accessed.

Absence >>

Registration of absence* together with an overview of all your absence registrations and balances e.g. sick leave and holiday.

Specielle oplysninger >>

Documents >>

See documents that have been uploaded in connection to your salary registrations.

Registrations >>

See and do your salary registrations.

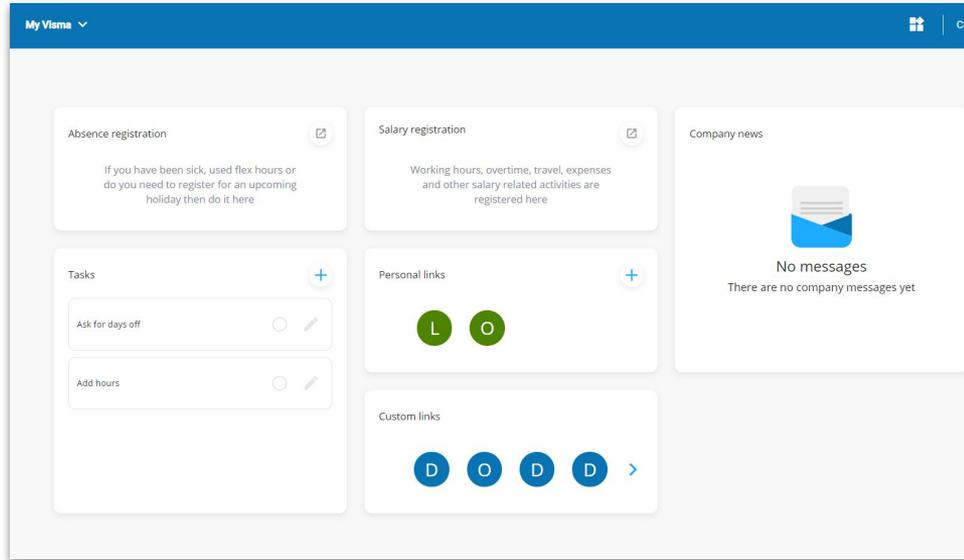
Settings >>

Set up of your own My Visma account.



Dashboard

Provides you with shortcuts to registrations, company news and relevant links.



Guides

- [Make dashboard my homepage >>](#)
- [Adjust your dashboard >>](#)

Dashboard



Make dashboard my homepage

The Dashboard makes it easier for you to access your most frequently used feature in My Visma. It provides an overview, easy search feature, dashboard, relevant links, notifications on birthdays and hires and terminations.

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

Adjusting the dashboard

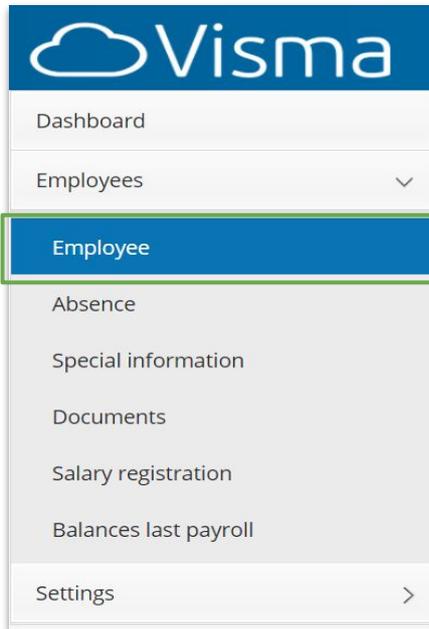
The dashboard can be adjusted as you wish. This is how to deselect any preselected screenings:

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

- Employee >>
- Absence >>
 - Status codes >>
 - Absence balances >>
 - Create absence registration >>
- Salary registration >>
 - Create salary registrations >>
- Special information >>

Employees



Employee

In My Visma you have access to see information such as your contact information, salary and absence.



Relatives

This menu item is used to register your closest relatives. We recommend that you register at least one relative

1. Select 'Add more relatives'
2. Select type of relative in the box "Relative"
3. Type in relevant information on the relative
4. Finish by clicking 'Save'

Employee



Absence

Here, all your absence registrations and balances are shown. The circles on the right of the screen show your balances. This is also where you can register your latest absence.

Status codes

You can see the status codes for your absence registrations, as well. The status codes show where in the process the individual registration is:

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

From: 02-12-2020 To: 02-03-2022 Absence type: All

Simulate future vacation ?

By the: 30-06-2021 **CALCULATE**

6,24 days / **46,23** hours **CLEAR**

Balances Show the old balances

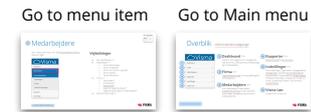
- 21,62 DAYS FERIE INCL. 6. FERIE...
- 5 DAYS OMSORGS...
- 22,2 HOURS TIMEBANK
- 69,3 HOURS FLEKS
- 0 DAYS FERIEFRI DAGE

ABSENCE TYPE	START DATE	END DATE	ABSENCE NUMBER	STATUS	COMMENT	
50 Ferie	17-02-2021	19-02-2021	3 day(s)	Approved		VIEW
46 Fleks/opsaml. sfoholdt	25-01-2021	25-01-2021 15:00	3 hour(s)	Processed		VIEW
50 Ferie	28-12-2020	30-12-2020	3 day(s)	Processed		VIEW
60 Omsorgsdage	23-12-2020	23-12-2020	1 day(s)	Processed		VIEW

+ NEW

To be continued on the next page...

Medarbejdere



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

When your leader approves the registration it will be processed for payroll. As an employee you cannot edit or delete approved registrations. This can only be done by the administrator.

If your leader rejects a registration this will be shown with the status "Rejected" and a "Reject comment". You can now edit or delete the rejected registration by clicking on the symbols for edit/delete on the right in the row for the registration.

In the circles you can see how much you are owed in the different balances.

The screenshot displays the 'Medarbejdere' application interface. At the top, there are navigation links: 'Go to menu item' and 'Go to Main menu'. The main content area is titled 'Medarbejdere' and includes a 'Balances' section with five circular gauges showing: 21.62 DAYS (FERIE INCL. 6. FERIE...), 5 DAYS (OMSORGS...), 22.2 HOURS (TIMEBANK), 69.3 HOURS (FLEKS), and 0 DAYS (FERIERE DAGE). Below this is a 'Simulate future vacation' form with a date picker set to 30-06-2021 and a 'CALCULATE' button. The result shows 6,24 days and 46,23 hours, with a 'CLEAR' button. A table below lists absences with columns for Absence Type, Start Date, End Date, Absence Number, Status, and Comment. A '+ NEW' button is located at the bottom right of the table.

ABSENCE TYPE	START DATE	END DATE	ABSENCE NUMBER	STATUS	COMMENT
50 Ferie	17-02-2021	19-02-2021	3 day(s)	Approved	VIEW
46 Fleks/opsaml. afholdt	25-01-2021	25-01-2021 15:00	3 hour(s)	Processed	VIEW
50 Ferie	28-12-2020	30-12-2020	3 day(s)	Processed	VIEW
60 Omsorgsdage	23-12-2020	23-12-2020	1 day(s)	Processed	VIEW

Employees

Go to menu item



Go to Main menu



Absence registration

1. Click on the button "New"
2. Select " type of absence" 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 calendar for absence
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 of time you have been absent
7. It is possible to fill out a "Remark"
8. Finish by clicking "Save"

The screenshot shows a dialog box titled "Absence registration" with the subtitle "Register new Absence for - 10 Niels Peter Hansen - Aktiv". The form contains the following fields:

- Absence type:** A dropdown menu with "Choose" selected.
- Start date *:** A date input field with a calendar icon.
- End date *:** A date input field with a calendar icon.
- Absence number *:** A text input field containing "0.00".
- Calendar days:** A text input field containing "0.00" followed by "day(s)".
- Remark:** A large text area for entering a remark.
- Buttons:** "Save" and "Cancel" buttons at the bottom right.

Employees

Go to menu item



Go to Main menu



Absence balances

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.

The screenshot shows a web interface for calculating future vacation. At the top, there are three input fields: 'From' with the date '02-12-2020', 'To' with the date '02-03-2022', and 'Absence type' with a dropdown menu set to 'All'. Below these is a section titled 'Simulate future vacation' with a help icon. Underneath, there is a 'By the' field with the date '30-06-2021' and a 'CALCULATE' button. The result is displayed as '6,24 days / 46,23 hours' with a 'CLEAR' button.

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.

Employees



Salary registrations

You can create items that are relevant for the calculation of your salary, e.g. overtime, expenses or holiday.

This is how to register your salary registrations:

1. Click on the button “New” in the top right corner
2. Select salary registration type in the dropdown menu. In the box “Name” you can write a text which will be shown on your payslip
3. Fill in the start date
4. Add number and amount
5. Type in any remark you might have
6. Finish by clicking on ‘Save’

If you upload a document in connection with your salary registration you can see this in the menu item “Documents”.

Salary registration

Salary registrati... Choose

Name

Start date

Remark

Upload Document

Save Cancel

Employee



Documents

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

Documents

New



[> Advanced search](#)

Category 	Document	Comment	Uploaded	Uploaded by	Size	
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Employees



Special information

The menu item “Special information” is used to see any extra information that is registered on you. This might include a company phone or other handed out effects from your company.

Has your administrator e.g. registered handed out effects on your behalf it will show here.

Special information

Search for employees 

[> Advanced search](#)

Firmabil PMO/PMP Uddannelse Udleverede kort Miscellaneous

New special information

Only show active special information



Settings

My Settings

Miscellaneous settings:

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

Misc. settings

Choose language

Start page

Adjust pages to this height

Employee search

Auto hide

Default search field

Default search value



VISMA

DNB