

Ceri Self-Service

User Guide

Version 3.0

Welcome to Ceri Self-Service - the website which allows you to take control of your own employee profile.

We hope you find Ceri Self-Service easy to navigate and use, however this guide is aimed at giving you step by step instructions on using the system.

Use the links on the following page to jump to the relevant section.

Please do not print this document.

This document will be updated as the Ceri Self-Service system develops over the next few months. Please always use the link to this document (ceri.ceredigion.gov.uk) to ensure you are always accessing the latest version.

For all queries on Ceri Self-Service and People Manager:

email: ceri@ceredigion.gov.uk

Extension: 3949

External landline: 01970 633949

Contents

1	Introduction	3
2	Getting Started	4
3	Home Screen	7
4	Personal	10
5	Absence	15
6	Pay & Benefits	22
7	Employment	29

1 Introduction

Ceri Self-Service is a secure web-based application that allows you to manage your own employee profile.

In this first release of Ceri Self-Service you will be able to:

- Update your **personal details**
- View and manage your **payslips**
- View your employment **details**

The sections within this guide give you step by step instructions on how to use these areas of the system.

From 1st September 2015 you will also be able to:

- Book and manage **annual leave**
- View your **sickness** record
- Submit **mileage and expenses claims**

This document will be updated as soon as these sections are available.

2 Getting Started

CONTENTS

[Supported Devices](#)

[Username and Password](#)

[Accessing the system](#)

[Login](#)

[First Login](#)

[Logout](#)

[Security](#)

2.1 Supported Devices

In order to access Ceri Self-Service all you will need is a device that can access the internet. This could be one of the following:

- Work PC or laptop
- Home PC or laptop
- Tablet (e.g. iPad)
- Smart Phone (e.g. iPhone)

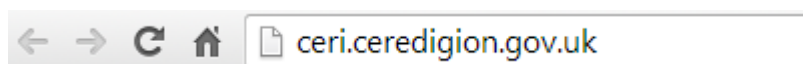
The majority of internet browsers are supported including Internet Explorer, Google Chrome, Mozilla Firefox and Safari.

2.2 Username and Password

Your Ceri Self-Service account is accessed by a unique username and password. This will arrive via a letter in the post to your home address.

2.3 Accessing the system

Ceri Self-Service can be accessed by inserting the following URL in your internet browser:



You don't need to put a www. before this address.

Once you have entered this address you will see the following screen:

Click the link which says **Access Self-Service** in the left hand side box.



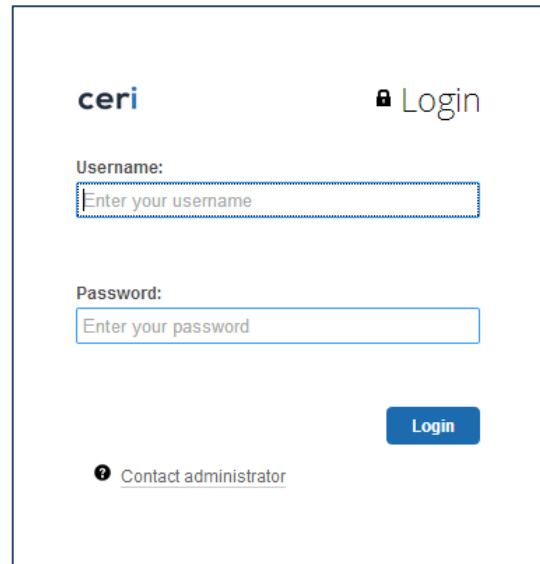
2.4 Login

After clicking on **Access Self-Service** the following login box will then be displayed:

Enter your **username**.

Enter your **password**.

Click **Login**



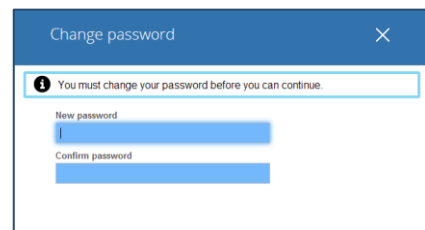
2.5 First Login

On your first login the system will ask you to choose a new password.

Your new password must be:

- at least **8 characters long**
- a mixture of **upper case and lower case** letters
- include at least **one numeric character**

Enter your new password twice and click

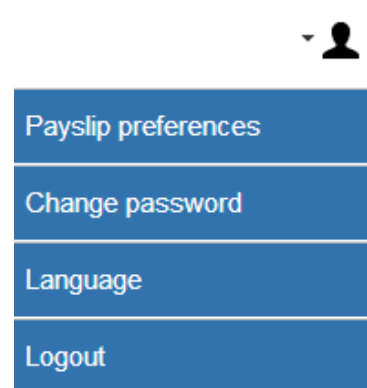


2.6 Logout

To logout click the **Person icon**  in the top right hand side of the screen.

Click Logout.

The system will return to the login screen. You can now close your internet browser.



2.7 Security

Ceri Self-Service holds important information about you and your employment. It is vital that you therefore keep your account details safe and secure.

Please keep the following in mind when using the system:

- Never give your username or password to anyone else
- Ensure that you never leave your account logged in when you're not around
- Take care when accessing the system from public WiFi networks or on shared devices

If you notice any unusual activity within your account please report it to the Ceri Self-Service team as soon as possible.

3 Home Screen

CONTENTS

[Overview](#)

[Main Menu](#)

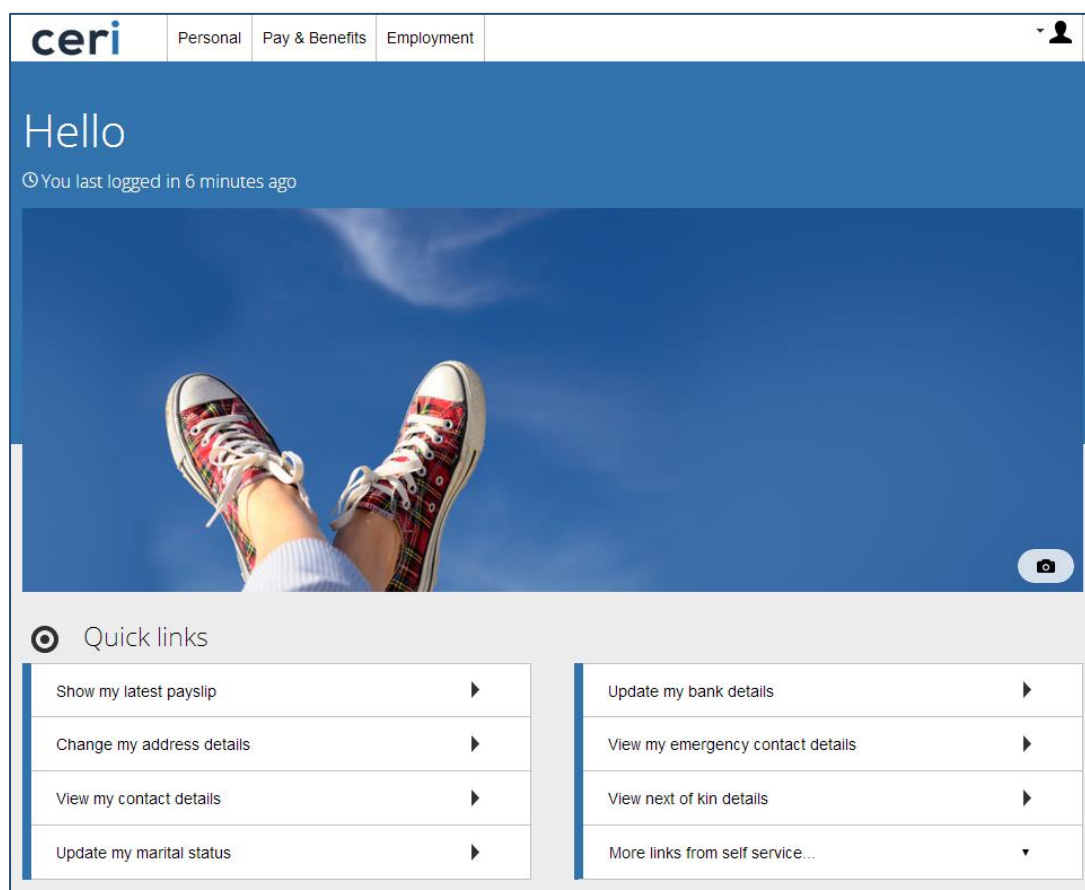
[Language](#)

[Cover Image](#)

[Quick Links](#)

3.1 Overview

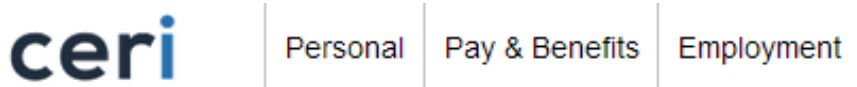
After Logging in you will be presented with the **Home** screen.




You can return to this screen at any time by clicking the Ceri logo **ceri** in the top left of the screen.

3.2 Main Menu

The main menu should be used to access the relevant parts of the system:



3.3 Language

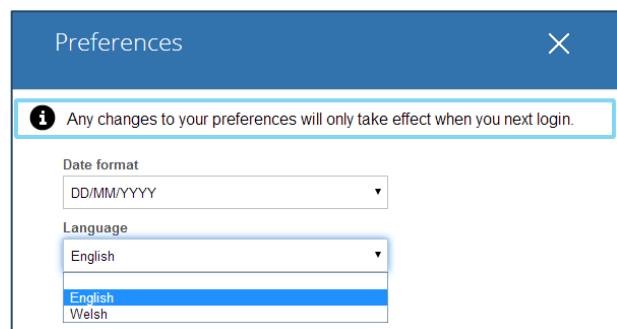
Click the **Person icon**  from the top right of the screen to access the language settings:

The language options available are English and Welsh.

If you wish to change the language of Self-Service to Welsh **select Welsh** and then click **Save**.

You will need to logout and log in again for these changes to take effect.


This is a once-only task and the system will know to provide the Welsh Self-Service every time you login from that point on.



3.4 Cover Image

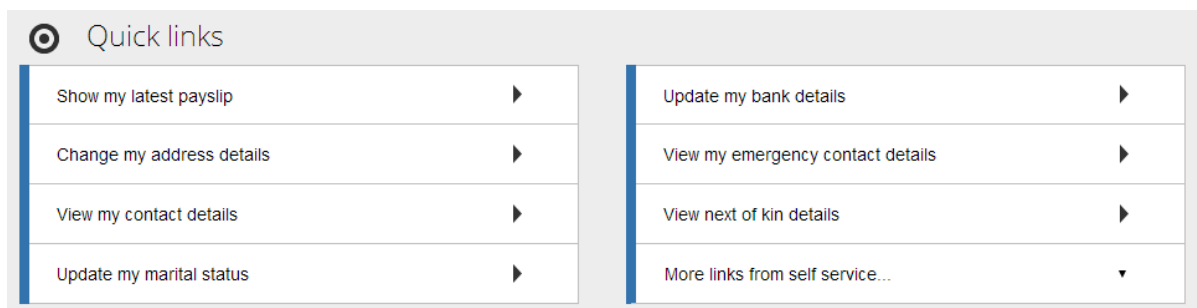
The cover image can be changed to an image of your choice.

This new image will only be available to you on your login.

Click the **camera icon**  in the bottom right of the image and then choose an image of your choice from your device to replace it with.



3.5 Quick Links



The quick links section of the homepage gives you fast access to some of the most commonly used pages on the system.

4 Personal

The Personal section allows you to view and update your personal details.

CONTENTS

[Overview](#)

[Personal Details](#)

[Address](#)

[Contact Information](#)

[Friends & Family](#)

[Vehicle Details](#)

4.1 Overview

Select **Personal** from the **Main Menu**

ceri

Personal

Pay & Benefits

Employment

Information is provided in white boxes, which you can click to view and update details.

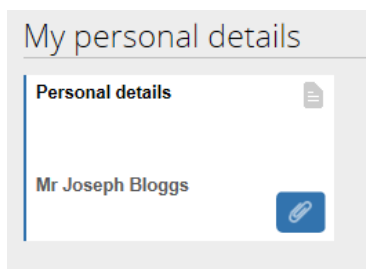
The screenshot shows a 'Personal' window with a close button (X) in the top right corner. The window is divided into several sections:

- My personal details:** A box containing 'Mr Joseph Bloggs' with an edit icon.
- Contact information:** A section with a '+ Add' button. It contains three boxes: 'Home - Mailing address' (1 Great Darket Street, Aberystwyth, SY23 ABC), 'Personal Landline Telephone' (01970612346), and 'Personal Mobile' (07123456789).
- Friends & Family:** A section with a '+ Add' button. It contains two boxes: 'Emergency contact' (Jane Bloggs, Wife, Primary) and 'Next of kin' (Jane Bloggs, Wife).
- Bank details:** A section containing one box for 'HSBC' (400809).

To add additional information use the  **Add** button under the relevant heading.

4.2 Personal Details

Click the white box titled **Personal details**.



Update the details available to you and click .

Personal details

Surname
Bloggs

Forename
Joseph

Forename 2

Forename 3

Title
Mr

Preferred name
Joe

Previous surname

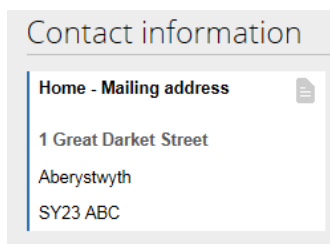
Marital status
Married

Date of birth
01/01/1980

Save Cancel

4.3 Address

Under **Contact information** click the white address box.



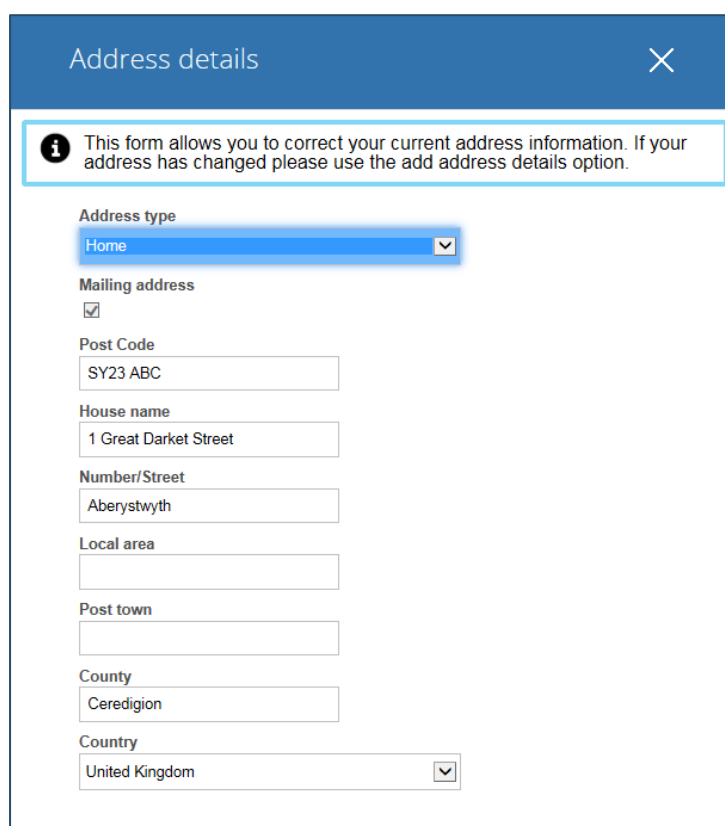
Contact information

Home - Mailing address

1 Great Darket Street
Aberystwyth
SY23 ABC

Update the details available to you and click

Save



Address details

This form allows you to correct your current address information. If your address has changed please use the add address details option.

Address type
Home

Mailing address

Post Code
SY23 ABC

House name
1 Great Darket Street

Number/Street
Aberystwyth

Local area

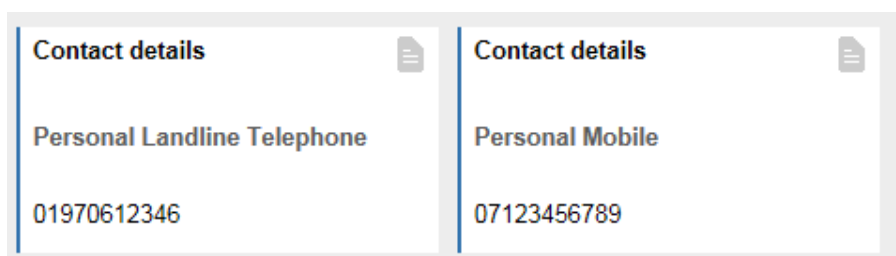
Post town

County
Ceredigion

Country
United Kingdom

4.4 Contact Information

Any existing contact details you have provided to us will be displayed here:



Contact details

Personal Landline Telephone
01970612346

Contact details

Personal Mobile
07123456789

Click on one of these boxes to update the information and click



Contact details
×

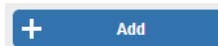
Contact type

Personal Mobile

Contact at

07123456789

If you wish to add additional information use the



button.

4.5 Friends & Family

You can provide details of your emergency contact and next of kin if you wish.

Friends & Family

+ Add

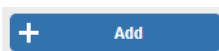
Emergency contact

Jane Bloggs
Wife
Primary

Next of kin

Jane Bloggs
Wife

Click the



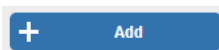
button to add new details.

4.6 Vehicle Details

Before being able to submit a claim for mileage from 1st September you must have a vehicle stored against your profile. This is used to apply the correct rate of pay and simplify the claims process for you.

4.6.1 Add Vehicle


Click the



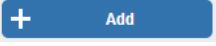
button and fill in the details as follows:

Field	Value
Vehicle Type	Make a choice from: <ul style="list-style-type: none"> Car Motorcycle
Vehicle Registration	Enter the registration number


Start Date	This should be the date that you wish to start using the car from. This cannot be earlier than your start date with the council
Engine size	This should be the CC of your vehicle's engine. This is used to select the correct mileage rate.
Default vehicle for expenses	If you have more than one vehicle in your profile, select this box for the vehicle that you use most often

Once you have entered the information above click  and the vehicle will get saved to your profile.

4.6.2 Multiple vehicles

If you use more than one vehicle for travelling purposes, you can add multiple vehicles simply by selecting  and repeating the process above.

4.6.3 Delete vehicle

You can delete a vehicle by clicking on the vehicle and clicking .

Note: You cannot delete a vehicle if you have already used that vehicle in a claim. You can however enter an end date of when you stopped using that vehicle.

5 Absence

CONTENTS

[Overview](#)

[My Calendar](#)

[Holidays](#)

[Sickness](#)

[Other Leave](#)

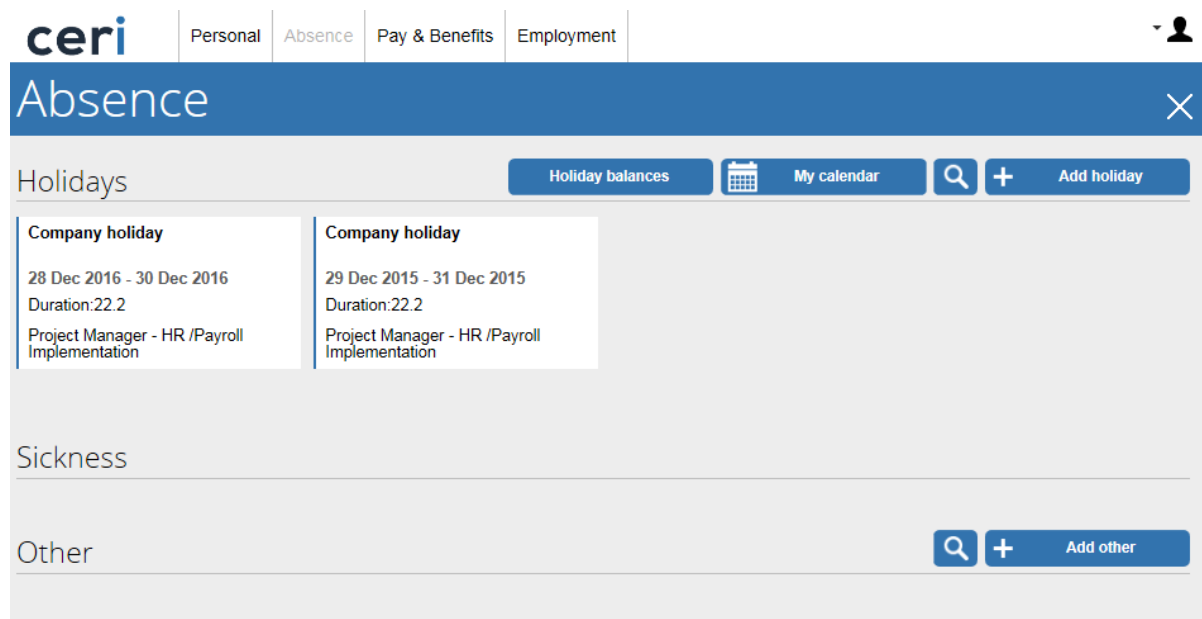
5.1 Overview

Select **Absence** from the **Main Menu**

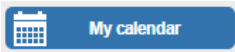


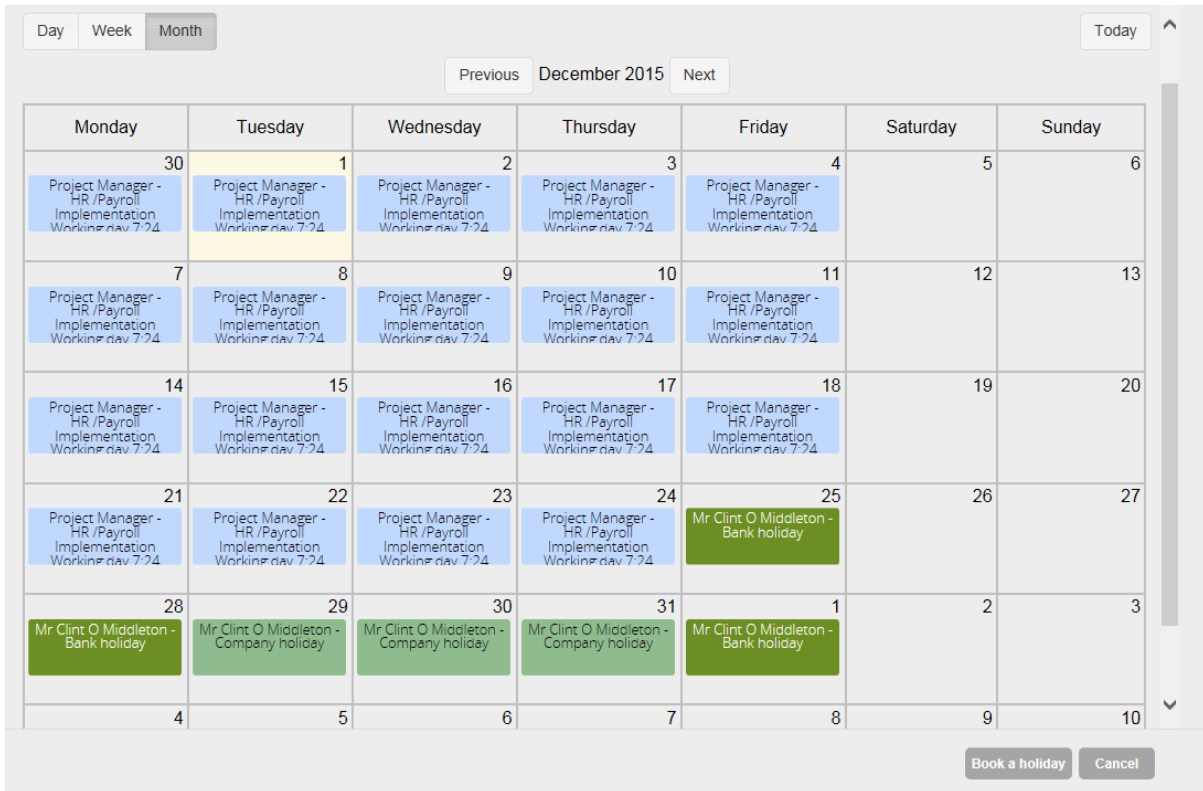
The Absence section allows you to view and manage:

- **Holidays** – annual leave and bank holidays
- **Sickness** – read only access to your sickness history
- **Other Leave** – all other types of leave, e.g. flexi leave, compassionate leave



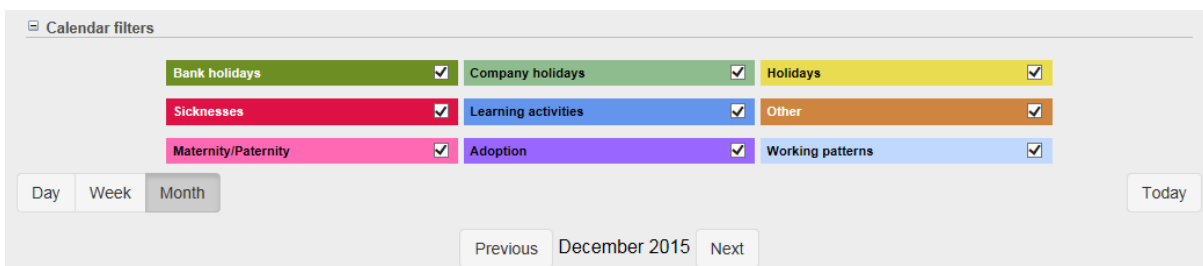
5.2 My Calendar

Click  to view any leave or sickness already booked or entered into the system. This will also display your default working pattern, which has been provided by your line manager.



Day	Week	Month	December 2015							Today
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday				
30	1	2	3	4	5	6				
Project Manager - HR/Payroll Implementation Working day 7:24	Project Manager - HR/Payroll Implementation Working day 7:24	Project Manager - HR/Payroll Implementation Working day 7:24	Project Manager - HR/Payroll Implementation Working day 7:24	Project Manager - HR/Payroll Implementation Working day 7:24						
7	8	9	10	11	12	13				
Project Manager - HR/Payroll Implementation Working day 7:24	Project Manager - HR/Payroll Implementation Working day 7:24	Project Manager - HR/Payroll Implementation Working day 7:24	Project Manager - HR/Payroll Implementation Working day 7:24	Project Manager - HR/Payroll Implementation Working day 7:24						
14	15	16	17	18	19	20				
Project Manager - HR/Payroll Implementation Working day 7:24	Project Manager - HR/Payroll Implementation Working day 7:24	Project Manager - HR/Payroll Implementation Working day 7:24	Project Manager - HR/Payroll Implementation Working day 7:24	Project Manager - HR/Payroll Implementation Working day 7:24						
21	22	23	24	25	26	27				
Project Manager - HR/Payroll Implementation Working day 7:24	Project Manager - HR/Payroll Implementation Working day 7:24	Project Manager - HR/Payroll Implementation Working day 7:24	Project Manager - HR/Payroll Implementation Working day 7:24	Mr Clint O Middleton - Bank holiday						
28	29	30	31	1	2	3				
Mr Clint O Middleton - Bank holiday	Mr Clint O Middleton - Company holiday	Mr Clint O Middleton - Company holiday	Mr Clint O Middleton - Company holiday	Mr Clint O Middleton - Bank holiday						
4	5	6	7	8	9	10				

Use the buttons above the calendar to manage the navigation and display:



Calendar filters

- Bank holidays
- Company holidays
- Holidays
- Sicknesses
- Learning activities
- Other
- Maternity/Paternity
- Adoption
- Working patterns

Day Week Month Today

Previous December 2015 Next

IMPORTANT – if your working pattern is incorrect please discuss it with your manager as soon as possible.

5.3 Holidays

Your holidays are split into 2 entitlements:

- **Annual Leave** – this entitlement is dependent on your length of service, contracted hours and any carried forward entitlement.

- **Bank Holidays** – this entitlement is based on your contracted hours

Both of the above allowances are available by clicking

[Holiday balances](#)

✕
Holiday Balances

i The balance takes account of all recorded holidays including any awaiting authorisation

Project Manager - HR /Payroll Implementation - Annual Leave

Holiday Period	Entitlement	Taken	Scheduled	Balance
1 Sep 2015 - 31 Aug 2016	193 hours	0 hours	22.2 hours	170.8 hours
1 Sep 2016 - 31 Aug 2017	193 hours	0 hours	22.2 hours	170.8 hours

Project Manager - HR /Payroll Implementation - Bank Holidays

Holiday Period	Entitlement	Taken	Scheduled	Balance
1 Sep 2015 - 31 Aug 2016	59.2 hours	0 hours	59.2 hours	0 hours
1 Sep 2016 - 31 Aug 2017	59.2 hours	0 hours	59.2 hours	0 hours

5.3.1 Multiple positions

If you have more than one position your entitlement is shown per position. For example if you have 2 positions you would see 2 annual leave entitlements and 2 bank holiday entitlements. When you book a holiday you can choose to take this over all positions or for a single position only.

5.3.2 Positive bank holiday balance

If your bank holiday balance is showing a positive figure, this is usually caused by your working pattern recorded as not working most bank holiday dates, but your contracted hours has given you an entitlement greater than the number of bank holidays which fall on your working pattern.

This additional entitlement can be taken as additional holiday leave when you select

[+ Add holiday](#)

5.3.3 Negative bank holiday balance

If your bank holiday balance is showing a negative figure this is usually caused by your working pattern recorded as working most bank holiday dates, but your contracted hours are not full time and therefore you do not have enough bank holiday entitlement to take every bank holiday in your working pattern.

IMPORTANT – negative bank holiday balances will need to be balanced back to zero by counterbalancing from your annual leave entitlement. This will be done automatically by the system in the coming weeks.

5.3.4 Booking a holiday

To book a holiday click 


Follow the on screen instructions to book:

- Part Day – morning or afternoon
- Full Day – a single day
- More than one day – a period longer than one day

Holiday details
×

Absence type
Annual Leave ▼

Holiday period
Full day ▼

Start date
09/10/2015 

Notes
Example annual leave request

Save

Once you've completed the details click

5.3.5 Hours

Your annual leave and bank holiday entitlement are now in hours. You are only able to choose a half or full day of leave, as per the current leave policy. When you book a holiday the system looks at your working pattern to establish how many hours to apply to that holiday.

5.3.6 Holiday Authorisation

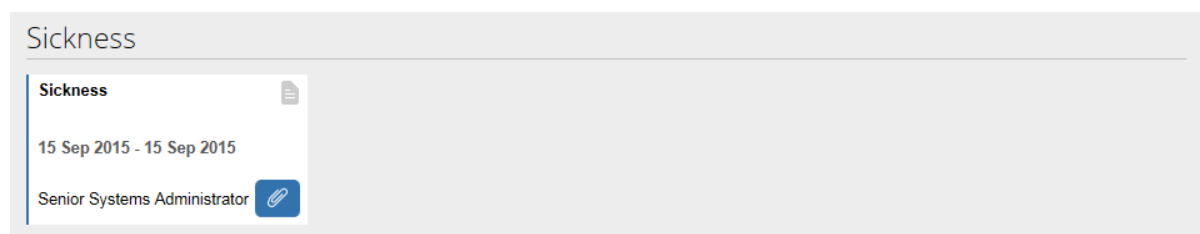
Holidays		
Holiday balances	My calendar	+ Add holiday
<p>Company holiday</p> <p>28 Dec 2016 - 30 Dec 2016</p> <p>Duration:22.2</p> <p>Project Manager - HR /Payroll Implementation</p>	<p>Company holiday</p> <p>29 Dec 2015 - 31 Dec 2015</p> <p>Duration:22.2</p> <p>Project Manager - HR /Payroll Implementation</p>	<p>Annual Leave</p> <p>9 Oct 2015 - 9 Oct 2015</p> <p>Duration:7.4</p> <p>Project Manager - HR /Payroll Implementation</p> <p style="color: orange;">Awaiting authorisation</p>

Once a holiday request has been made the status will change to **Awaiting Authorisation**. Your manager will receive a notification and will either authorise or reject the request. You

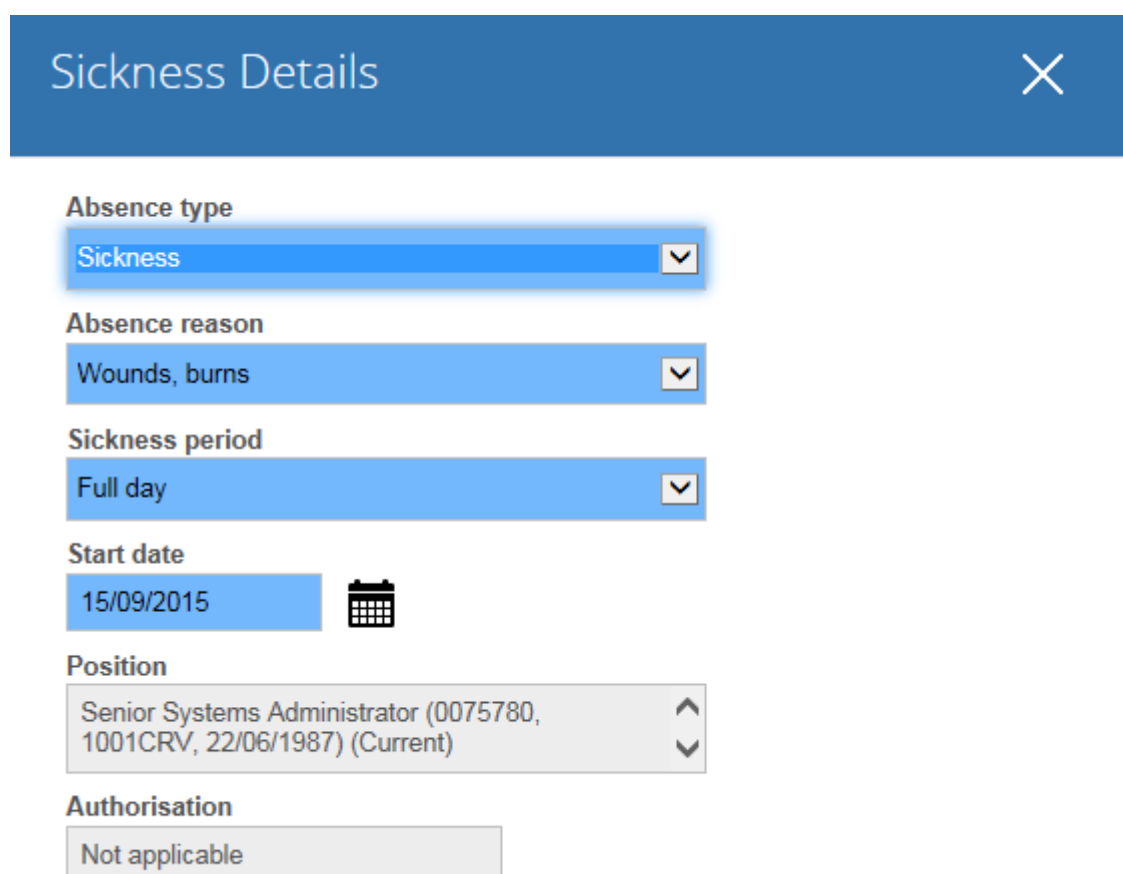
will receive an email notification of this as well as seeing the status change within Ceri Self-Service.

5.4 Sickness

Your sickness history from 1st September 2015 will be shown in Ceri Self-Service.



You are able to open and view the details of the sickness record, but you are unable to make changes and update it.

A screenshot of the 'Sickness Details' form in Ceri Self-Service. The form is displayed in a blue header with a close button (X). The form fields are as follows:

- Absence type:** A dropdown menu with 'Sickness' selected.
- Absence reason:** A dropdown menu with 'Wounds, burns' selected.
- Sickness period:** A dropdown menu with 'Full day' selected.
- Start date:** A text field with '15/09/2015' and a calendar icon.
- Position:** A dropdown menu with 'Senior Systems Administrator (0075780, 1001CRV, 22/06/1987) (Current)' selected.
- Authorisation:** A text field with 'Not applicable'.

If you have any queries on a sickness record please discuss it with your manager.

5.5 Other Leave

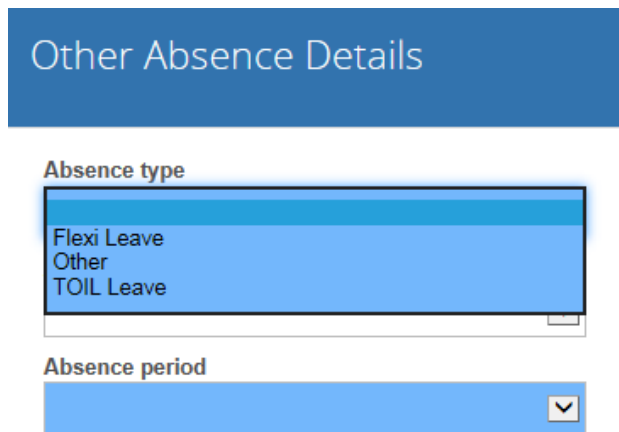
In addition to holidays and sickness you can also use Ceri Self-Service to record other leave such as flexi leave, compassionate leave or medical appointments.

5.5.1 Booking Other Leave

To book other leave click 

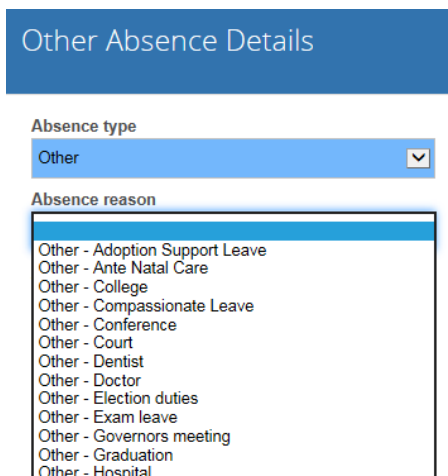
Follow the on screen instructions to book:

- Part Day – morning or afternoon
- Full Day – a single day
- More than one day – a period longer than one day

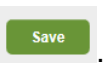


The screenshot shows a form titled "Other Absence Details". It contains two main sections: "Absence type" and "Absence period". The "Absence type" section is a dropdown menu with three options: "Flexi Leave", "Other", and "TOIL Leave". The "Absence period" section is a dropdown menu with a downward arrow icon.

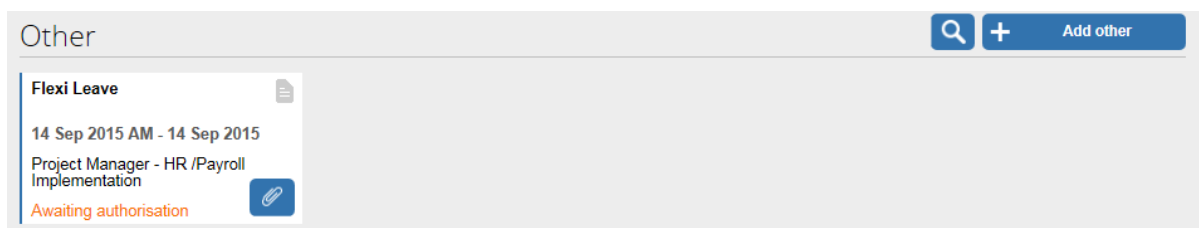
- **Flexi Leave** – this should only be used to book a flexi leave day
- **TOIL Leave** – this should only be used to book TOIL leave
- **Other** – after selecting Other please choose an absence reason from the list:



The screenshot shows the "Other Absence Details" form with the "Absence type" dropdown set to "Other". Below it, the "Absence reason" dropdown is open, showing a list of reasons: "Other - Adoption Support Leave", "Other - Ante Natal Care", "Other - College", "Other - Compassionate Leave", "Other - Conference", "Other - Court", "Other - Dentist", "Other - Doctor", "Other - Election duties", "Other - Exam leave", "Other - Governors meeting", "Other - Graduation", and "Other - Hospital".

Once you've completed the details click 

5.5.2 Other Leave Authorisation



Once a period of Other Leave has been requested the status will change to **Awaiting Authorisation**. Your manager will receive a notification and will either authorise or reject the request. You will receive an email notification of this as well as seeing the status change within Ceri Self-Service.

6 Pay & Benefits

CONTENTS

[Overview](#)

[Payslips](#)

[P60](#)

[Mileage & Expenses](#)

6.1 Overview

Select **Pay & Benefits** from the **Main Menu**

ceri

Personal

Pay & Benefits

Employment

The Pay & Benefits section allows you to view your payslips and P60.

Pay & Benefits

Payslips

Pay date	28 Aug 2015	Pay date	31 Jul 2015	Pay date	30 Jun 2015
Net pay	5,896.80	Net pay	0.00	Net pay	0.00

P60

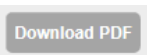
i There are no Statement of Earnings details to display.

6.2 Payslips

Your existing payslips since June 2015 will be shown here. Click on a payslip to view the on screen payslip:


Payment		Cash	Benefit		Cash	Deduction		Cash
Salary		1,352.58				Tax	103.80	
Salary (Back P...		5,410.32				Tax (Back Pay)	414.60	
						NI - D	69.54	
						NI - D (Back Pay)	278.16	


Name: Mr Joseph Bloggs	Total payments:	6,762.90
Pay date: 28/08/2015	Total deductions:	866.10
Tax code: 1000L Cumulative		
Tax month: 5		
National Insurance category: D		
Legislation: UK		
Currency: British Pound		
National Insurance number: AB123456C	Net pay:	5,896.80

Click  to print or save a PDF version of the payslip.

Note: Payslips should not be printed in work, but can be printed from home.


6.2.1 Email Payslip

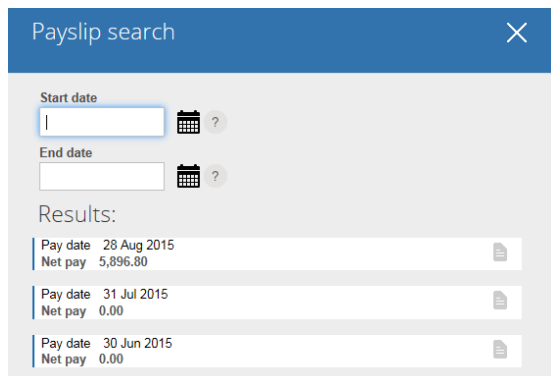
You can set the system to automatically email a PDF copy of your payslip every month. To enable this click the **Person icon**  from the top right of the screen and choose 'Payslip Preferences'.

Payslip preferences	
 Only a-z characters (uppercase or lowercase) and numbers are allowed on this page.	
Payslip options	
Email payslip	<input checked="" type="checkbox"/>
Email address	<input type="text"/>
Password for payslip	<input type="password"/>
Confirm password	<input type="password"/>
P60 options	
Email P60	<input type="checkbox"/>

We would recommend using a personal (not work) email address here. A password is required to secure the PDF document when it is sent.

6.2.2 Payslip History


Your payslips will be saved in your account from June 2015 onwards. You will see the latest 12 payslips in the payslips section; however you can go back further than this by using the search box 

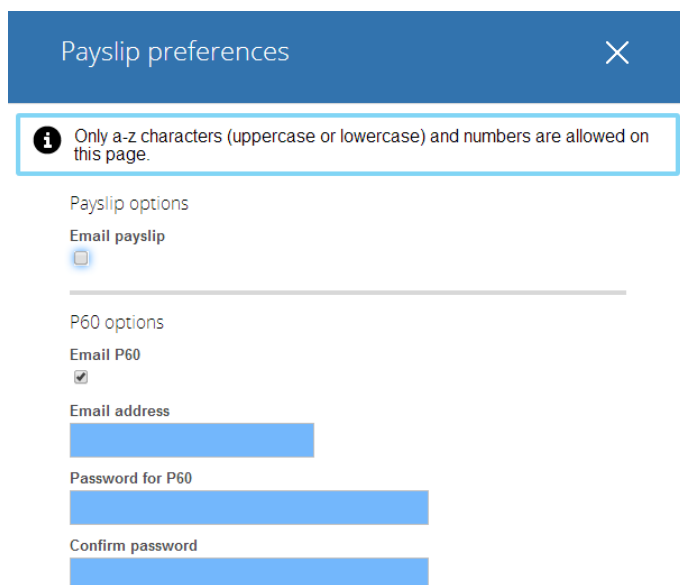


6.3 P60

Your annual P60 will be shown at the end of the 2015/16 financial year. Similar to payslips you can access all your P60 history from 2015/16 onwards.

6.3.1 Email P60

You can set the system to automatically email a PDF copy of your P60 each year. To enable this click the **Person icon**  from the top right of the screen and choose 'Payslip Preferences'.

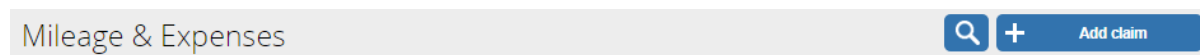


We would recommend using a personal (not work) email address here. A password is required to secure the PDF document when it is sent.

6.4 Mileage & Expenses

6.4.1 Create a new claim

Navigate to the '**Pay & Benefits**' main menu item and then scroll down to '**Mileage and Expenses**'



Click  to create a new claim.

The following box will appear:

Follow the instructions provided for completing the Start date, choose the job that you wish to claim for and then choose the correct template:

- **Mileage Claim** – this should be used for any mileage journeys that you undertake
- **Expenses Claim** - this should be used for any other expenses and is split into 4 sections – Parking and tolls; Subsistence; Other travel; Accommodation

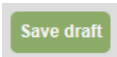
6.4.2 Entering a claim

Follow the instructions within the form to provide the necessary information.

Any boxes with a blue background are mandatory and must be completed for each row of information you enter.

6.4.3 Saving a claim

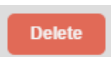
You can complete the form throughout the month and save a draft before submitting a final version. This will allow you to enter any travel or expenses as they are undertaken.

To save a claim click 


When you save a claim it appears in your Mileage & Expenses section, marked as 'Provisional'. Click on this to open up the claim to add more information or submit.

6.4.4 Deleting a claim

You can delete a claim, providing it has not been submitted.

To delete a claim click 

6.4.5 Submitting a claim


Once you have completed your claim click 

You will then be presented with the submission screen, where it asks you to certify your claim by re-entering your Ceri Self-Service password:

Password

If you are:

- submitting a **mileage claim** you are required to put your paper VAT receipts in the envelopes provided at admin points at Council buildings throughout the County.
- submitting an **expenses claim** then you are required to attach your receipts/invoices to the claim (see below) at this stage.

Once this is done and you are ready to submit the claim click 


6.4.6 Attaching receipts/invoices

To attach a receipt/invoice click the + icon next to 'Receipt attachments'.

Password

– Receipt attachments

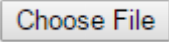

Attach receipts section (only applicable for expenses claims)

 No file chosen 


The system will accept receipts/invoices in the following formats:

- Image/photo – jpeg, gif, png
- Document – Word, PDF

To upload a file:

- Click the  button and select the file from your computer.
- Click the  button and wait for the file to appear

When a file has been uploading it will appear as follows:

1.
IMG_5335.JPG 

Repeat the process to add additional files.

6.4.7 Claim authorisation

Your claims will be authorised by your manager. Claims are marked with the following authorisation statuses:

- **Authorised** – ready for payment or has been paid
- **Awaiting Authorisation** – it is awaiting authorisation from your manager
- **Not Authorised** – your claim has been rejected by your reporting manager. Please discuss the reasons for this with your manager. You can make amendments to a rejected claim and re-submit it.



IMPORTANT - Your mileage claims will not require authorisation by your manager, however your manager will be able to view your claim and may decide to authorise or reject your claim. Your manager will be expected to review some but not all mileage claims.



6.4.8 Viewing your claim history

Your authorised claims are saved in your claim history.

Click the Search icon under the 'Mileage & Expenses' section 

Time and expense search

Start date
  

End date
  

To view all your authorised claims leave the date fields empty and click


Search

Results:

ZZZ Expenses Claim	
Start date 1 Sep 2015 Authorised	Reference EXPENSES100004
Summary	

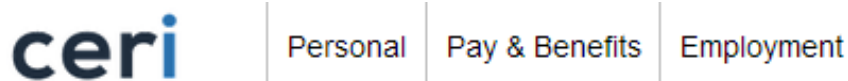
ZZZ Mileage Claim	
Start date 1 Sep 2015 Authorised	Reference MILEAGE100005
Summary	

Your claims are then displayed in a list for you to view:

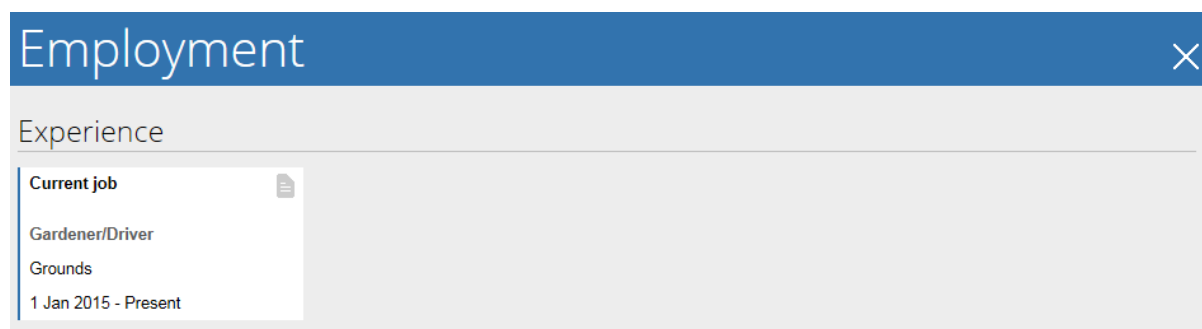
- Full claim details – click anywhere in the white box
- Claim summary – click [Summary](#)
- Claim attachments – click 

7 Employment

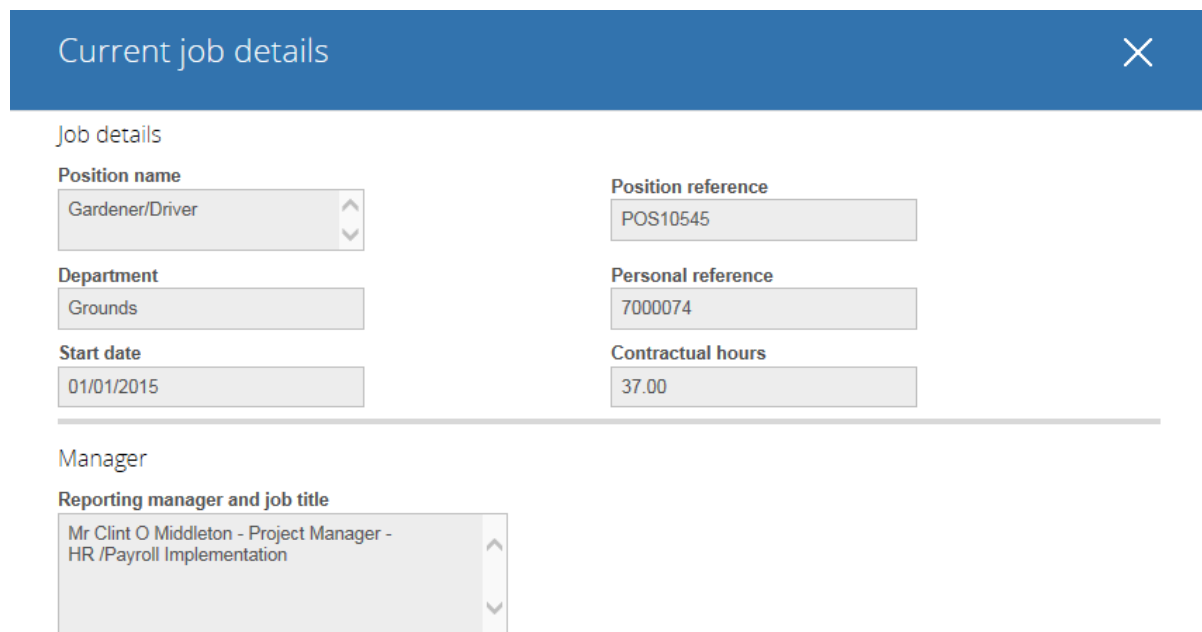
Select **Employment** from the **Main Menu**



The Employment section allows you to view your current position(s) and any previous position(s) with Ceredigion County Council from 1st April 2015 onwards.



Clicking on the position provides you with the information below:



Note: In the majority of cases your start date for your current position will be your start date with the council. The system will not hold your position history before 1st April 2015.