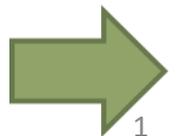




YOU ONLY NEED YOUR MOUSE FOR THIS TUTORIAL,
YOUR KEYBOARD IS NOT REQUIRED.

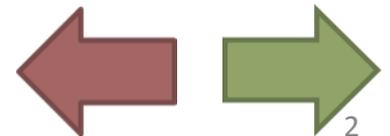


SELECT THE ARROWS
TO PROGRESS
THROUGH SLIDES

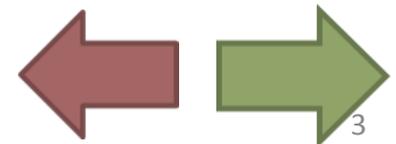


MYVIEW GUIDANCE NOTES FOR CAR MILEAGE AND EXPENSES

INDEX



- These guidance notes will provide details on how to submit a Mileage and/or Expenses claim form through MyView.
- New claim – Mileage
- Before submitting claims, please check that your vehicle has been approved by your line manager. If your vehicle is not detailed on MyView, please refer to the guidance notes on registering your vehicle.
- **Please note** that **both** mileage and expenses claims can be submitted on the same form, they just need to be created on different lines.
- Once logged into MyView (Refer to the guidance notes which are available via the link on the main website page for login on instructions)



INDEX

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- 6 – [Entering further details for the claim](#)
- 7 – [Choose whether you are doing a mileage claim or a general expenses claim](#)
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- 17 – Info on Form History

N.B
THE INDEX WILL BE
ACCESSIBLE THROUGH ANY
SLIDE, LOOK FOR THE
INDEX ICON AND CLICK
TO RETURN TO THIS
SCREEN.



How to access “Create a new expenses claim”

Dashboard 

View My Training/Absence

My Personal Details 

Car Mileage and Expenses 

Create New Expenses Claim

Form History

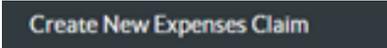
Mansfield DC Expenses Policy

Ashfield DC Expenses Policy

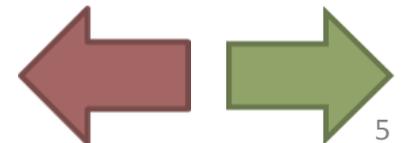
Guidance Notes - Mileage/Exp

My Vehicles

Guidance on Adding a Vehicle

Click the  button from the left hand side of the screen.
Then click 

INDEX



Entering Details for the claim

ERICA
H.R. Team Assistant -
Recruitment

Dashboard > Create New Expenses Claim

Create Expense Claim

New Claim

Enter your claim form information here

Position
H.R. Team Assistant - Recruitment

Description

Reason for Claim

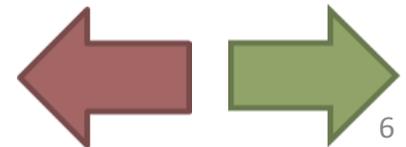
2000 characters remaining

Done ✓

Enter your details into the fields as above.

- Position – Make sure your job role is in the “position” box.
- Description – Enter the period of the claim for example “January 2017”
- Reason for Claim – Enter a general title such as “March claim for district Mileage”

For more details, click the  icon at the top right hand corner.



Entering further details for the claim

- Dashboard
- View My Training/Absence
- My Personal Details
- Car Mileage and Expenses
- Create New Expenses Claim**
- Form History
- Mansfield DC Expenses Policy
- Ashfield DC Expenses Policy
- Guidance Notes - Mileage/Exp
- My Vehicles
- Guidance on Adding a Vehicle

New Claim

Enter your claim form information here

Position
H.R. Team Assistant - Recruitment

Description
March 2017 Mileage and Expenses Claim

Reason for Claim
March claim for District Meetings

1967 characters remaining

Done ✓

When you have added in all of the relevant detail, please check your details and then click  .



Mileage or Expenses?

March 2017 Mileage and Expenses Claim H.R. Team Assistant - Recruitment

Form Info

Claim Information

Date Select Date

Group -- Select --

Add Line +

Select the **Add Line +** icon to enter the date of the claim and the type of claim.

March 2017 Mileage and Expenses Claim H.R. Team Assistant - Recruitment

Form Info

Claim Information

Date Select Date

Group -- Select Group --

Cancel OK ✓

Click Select group, and you'll see that you can either choose car mileage or expenses.

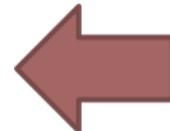
Select which tutorial you want to view first

MILEAGE

OR

EXPENSES

INDEX



CAR MILEAGE TUTORIAL

Create Expense Claim

March 2017 Mileage and Expenses Claim H.R. Team Assistant - Recruitment Form Info ? ↻

Claim Information

Date: 01/03/2017 📅 Group: Car Mileage ⌵ ?

Description: MDC to ADC and return - Attending meeting with finance
1946 characters remaining

Mileage Information

Mileage: 12 ⌵ Vehicle: HA110WE ⌵

Passengers: ⌵

Mileage Costs

VAT Receipt

Cancel OK ✓

Enter in the mileage you did on your travels. Then if you have more than one vehicle, select the vehicle you made the travel in and then add in the number of passengers (not including yourself). If you were the only one in the car, leave the field blank (as above).

The VAT receipt must be provided and attached to the final summary sheet. Please tick the VAT Receipt Icon to confirm provision. Failure to provide may result in late payment of claim. When you have entered in the relevant details, click OK ✓.



Submitting the Mileage claim

Claim Information

Date: 01/03/2017  Group: -- Select Group -- 

 Total Lines: 1 Total Miles: 12 

Cost Centre:	Date	Group	Type	Value	
Default Cost Centre	01/03/2017	Car Mileage		12	   

Attachments:

Your Expense Claim

Total Lines: 1
Total Miles: 12

Check through the details to confirm they are correct. To edit the claim, click the  icon and it will take you back to the previous screen.

You will notice that the status still shows as  as you are still making the claim.

If you are unhappy with the claim, click the  icon to delete the claim.

And to make another claim with the claim you have just made, click



Submitting a Mileage claim Part 2

Claim Information

Date: 09/03/2017

Add Line +

Cost Centre: Default Cost Centre

Open Total Lines: 2 Total Miles: 24

Date	Group	Type	Value	
09/03/2017	Car Mileage		12	   
01/03/2017	Car Mileage		12	   

Attachments:

Your Expense Claim

Total Lines 2
Total Miles 24

Submit ✓

Save 

Clear

This is what it looks like if you create a second claim, it will list them and you will also see a total of miles claimed.

When checked, click .

If you want to build up all of your claims, click  and then this claim will go to your form history for you to add claims on in the future. Click the  button for more information.



Printing off your mileage claim

i Please print this summary, attach receipts (ensuring that your Line Manager has checked these for verification), and forward the summary to Payroll at:

Payroll
C/O Human Resources
Mansfield District Council
Civic Centre
Chesterfield Road South
Mansfield
Notts
NG19 7BH

March 2017 Mileage and Expenses Claim H.R. Team Assistant - Recruitment

[Form Info](#) [?](#) [↻](#)

Submitted Total Lines: 2 Total Miles: 24

Your Expense Claim

Total Lines 2
Total Miles 24

Cost Centre:	Date	Group	Type	Value	
Default Cost Centre	09/03/2017	Car Mileage		12	▼
	01/03/2017	Car Mileage		12	▼

[Withdraw](#)

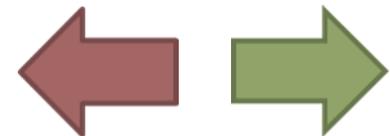
[Print Summary](#)

Your status will then say **Submitted** and this will be sent to your manager.

If you need to make a quick change or submitted it by accident, click [Withdraw](#).

Make sure you click [Print Summary](#) so you can attach the receipt and send/give that to your manager too.

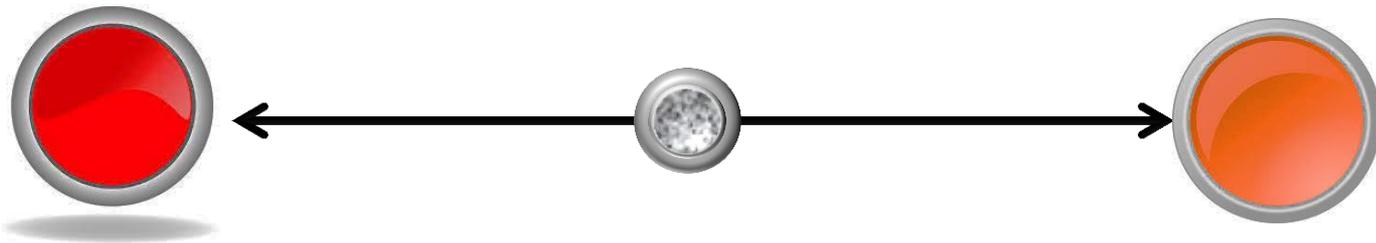
And that is the claim then created.



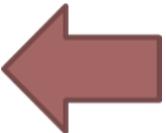
CLICK BUTTON TO
SELECT OPTION

Creating expenses claims

Creating Mileage Claims



To exit the slideshow, click the  icon at the top left corner of your screen.



30/03/2017

APP_TITLE

Please print this summary, attach receipts (ensuring that your Line Manager has checked these for verification), and forward the summary to Payroll at:

Payroll
C/O Human Resources
Mansfield District Council
Civic Centre
Chesterfield Road South
Mansfield
Notts
NG19 7BH

Employee Number: 012345
Employee Name: ERICA NERNIE
Claim Number: 0000000788
Claim Date: 30/03/2017

All figures in this claim are in Sterling

Claims against Default Cost Centre

Mileage Summary

Date: 17/03/2017	15
Description: Ashfield and back	
Date: 17/03/2017	4
Description:	19
Total Mileage:	19
<hr/>	
Total Mileage for claim:	19

Total Mileage for claim:	19
<hr/>	
Total Mileage:	19
Description:	19
Date: 17/03/2017	
Description: Ashfield and back	
Date: 17/03/2017	
Description:	

Preview of your claim as a hard copy

This is what the print out should look like, attach this to your receipt and hand over to your manager for authorisation.

Your expenses print out will look very similar but it will show the total costs.

INDEX



Click to return

This is what the screen will look like

New Claim



To create a new expense claim click on the 'Create New Claim' button.

Description: Enter the period e.g. November 2016

Reason for Claim: Enter type of claim e.g. Home visits

You will be able to save partially completed claims without actually submitting them for payment. When you are satisfied that you have completed your claim click on the 'Submit' button at the bottom of the expense form.

You will be able to see the details of any claims that you have saved or submitted for authorisation. You will also be able to see claims that have been authorised for payment or rejected by either your manager or the payment team.

Once your manager has approved your claim please print a copy of the submitted claim form and attach your receipts and send to the payment team.

When you click on the  icon, this text will appear which will show you what you need to enter into the fields and it gives you guidance if you are unsure.



Expense Claim Tutorial

 ERICA
H.R. Team
Assistant -
Recruitment

Dashboard

View My Training/Absence

My Personal Details ▾

Car Mileage and Expenses ▲

Create New Expenses Claim

Form History

Mansfield DC Expenses Policy

Ashfield DC Expenses Policy

Guidance Notes - Mileage/Exp

Dashboard > Create New Expenses Claim

Create Expense Claim

New Claim

Enter your claim form information here

Position

H.R. Team Assistant - Recruitment ▾

Description

Expenses claim for March 2017

Reason for Claim

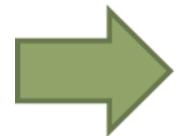
Expenses during period

1978 characters remaining

Done ✓

Similarly to the mileage claim, just enter the details of the claim and then click on  . Then select  .

INDEX



Adding all details to the expenses claim

Create Expense Claim

Expenses claim for March 2017 H.R. Team Assistant - Recruitment Form Info ? ↗

Claim Information

Date	22/03/2017	Group	Expenses	
Type	Travel Tax	Description	Train Fare from Mansfield to Nottingham and return for meeting at County Council 169 characters remaining	

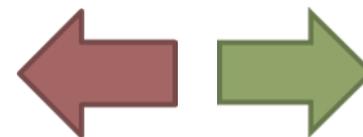
Costs and Receipts

Value	12.95	Receipt	1
-------	-------	---------	---

Cancel OK ✓

- Now enter the date select the group will be expenses.
- You will then be prompted to select the expenses type and explain what it was for in the description box, select OK again.
- Then add in the costs/value
- For each claim line you should have a receipt for the value being claimed.
- Please enter a number in the receipt box and write the number entered on the actual receipt so that it will correspond with the claim when checked. If no receipt is available for this claim, please leave the receipt box empty.
- All receipts should be attached to the final printed summary.
- Then select OK.

Please note: Click the icon **In MyView** to access the glossary which will explain what all the field types are.



Reviewing the expenses claim before submission

Expenses claim for March 2017 H.R. Team Assistant - Recruitment

Form Info

Claim Information

Date

Group

Cancel

OK ✓

Open Total Lines: 1 Total Value: £12.95

Cost Centre:	Date	Group	Type	Value	
Default Cost Centre	22/03/2017	Expenses	Travel Tax	£12.95	   

Attachments:

Your Expense Claim

Total Lines 1

Total Value £12.95

Submit ✓

Save

Clear

This is the same as the mileage claim, if you are happy with the claim, submit. If you want to add another claim, select  or if you want to edit the claim you have just made, select the pencil icon.

Select  to continue.



The summary of the submitted expenses claim

View Expense Claim

i Please print this summary, attach receipts (ensuring that your Line Manager has checked these for verification), and forward the summary to Payroll at:

Payroll
C/O Human Resources
Mansfield District Council
Civic Centre
Chesterfield Road South
Mansfield
Notts
NG19 7BH

Expenses claim for March 2017 H.R. Team Assistant - Recruitment

[Form Info](#) [?](#) [↻](#)

Submitted Total Lines: 1 Total Value: **£12.95**

Cost Centre:	Date	Group	Type	Value
Default Cost Centre	22/03/2017	Expenses	Travel Tax	£12.95

Your Expense Claim

Total Lines 1
Total Value **£12.95**

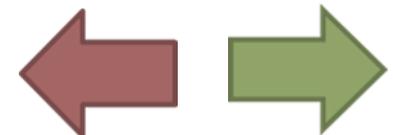
[Withdraw](#)

[Print Summary](#)

As you can see, when a claim is submitted, the status is showing as submitted, if you want to cancel the claim, select withdraw.

Please print the summary and then attach all receipts and give it to your manager.

That is an expenses claim submission now complete.



The form history – Where all saved claims go to

The screenshot shows a web application interface for 'Form History'. The sidebar on the left includes a user profile for ERICA, H.R. Team Assistant - Recruitment, and navigation links for Dashboard, View My Training/Absence, My Personal Details, Car Mileage and Expenses, Create New Expenses Claim, Form History (highlighted), Mansfield DC Expenses Policy, Ashfield DC Expenses Policy, Guidance Notes - Mileage/Exp, and My Vehicles. The main content area has a breadcrumb trail 'Dashboard > Form History' and a title 'Form History'. Below the title are filter sections: 'Keyword Search' with an input field 'Enter keywords to search', 'Date from' with 'Select a date from' and a calendar icon, 'Date to' with 'Select a date to' and a calendar icon, 'Event Filter' with a dropdown menu showing 'Expense Claims', and 'Status Filter' with buttons for 'Authorised', 'Open', 'Rejected', 'Submitted', and 'Withdrawn'. At the bottom of the filters are 'Clear search' and 'Search' buttons. Below the filters, there is a 'Results per page' dropdown set to '20' and 'Showing 19 results'. A table displays the following data:

Description	Event	Status	Raised Date	
dffggh	Expense Claims	Open	30 Mar 2017	▼
New Claim	Expense Claims	Submitted	30 Mar 2017	▼

To View form History, click the tab which is under “Create new expenses claim” and this will show you all of the claims you have saved or made, you can filter them just to show the open claims or rejected.

