Top Tips & F.A.Qs

5 Top Tips for Employees:
When you first start using MyView Dashboard:

1. Check that you're in the correct system!

The new system has a **black log-in screen**, if it is white and blue, you're in the old system! It sounds obvious, but many people make the mistake of clicking into the MyView link on the extranet, which is our old MyView system (we need to keep this for now as not everyone is on our new system yet). **Save the link from your roll-out email as a favourite** to access easily in the future.

2. Remember your password and security questions

- Your password and security questions are **case-sensitive**, so please be aware how you have set them up, e.g. all capitals / lower-case or mix
- **Be consistent**! The system doesn't know the answer to your questions, it just expects you to type in the word you have set-up, so if you find it difficult to remember the real answer because it's complicated, e.g. if your street is St Albans Avenue and you can never remember whether you set up "**St. Alban's Avenue**" or perhaps "**st albans ave**", use something else – as long as it's consistent every time you enter it and it's information you will remember.
- **Keep your password and security questions secure**! Remember that this system holds your bank details, national insurance number and pay information so **NEVER share your access** with someone else.

3. Familiarise yourself with the guidance / video tutorials

Don't wait until you need to put through a claim! The user guides can be found on the left hand side of your dashboard and are very user friendly. They have been kept short and simple with plenty of screen prints to help you through the system. As well as the main guides, individual sections have been added within specific areas to give guidance relating to that section, e.g. in the mileage / expense claim section you will find guidance on receipts, adding a vehicle etc. Video tutorials are also available on the system for a very quick guide to specific areas, these only last a few minutes and are a simple walk through.

4. If you are likely to claim mileage, enter your vehicle details now!

Don't wait until you're rushing through a claim form to realise you haven't entered your car details. When entering your car details:

- Please **read the guidance first – not all fields are mandatory**!
- Ensure that the **start date of your car is before the first date on your claim** (your car details need to be "active" at the time of your claim, e.g. if you set up your car from 3rd September but then try to use it to claim mileage on the 1st September it won't find your car.

5. Submit <u>one</u> claim form per month (not a form for each claim date)

- By clicking "**save for later**" on your claim form, you can return to your claim form (within the "**In Progress**" widget) and add more dates throughout the month.
- When you have entered all claim dates for the month click "**submit**" to send this to your manager for authorisation.
- Remember to **<u>name your claim form</u>**, e.g. December 2016, don't leave it as "new claim" as this makes it difficult for you to find historic forms in the future.

F.A.Qs

I haven't received the forgotten password email, what do I do?
Many employees have found that when they click on the "forgotten your password?" link, they do not receive the email with a new password. If you find this is the case, there are a couple of things you can check that may be affecting this:

- Is it going into your **junk folder** in your emails?
    - If it is, select the email, then select **Home > Junk > Never Block Sender** from your top menu bar, this should allow emails to come to your usual inbox next time.
- Do you have **American Settings** on your PC?
    - Check by clicking **Start > Control Panel > Region and Language** then select English UK from drop down menu in Format tab under formats.
    - If your settings are American, it means when you enter your date of birth to re-set your password the system doesn't recognise it as it expects your date of birth to start with month then day.
- If you still do not find the email, phone the HR Helpdesk on 01324 50(6222) and they will direct you to someone who can re-set your password.

Who cannot use the system:
At this moment in time casual posts cannot submit claims through the system due to their post reporting structure and people who do not have an email address and PC access are not accommodated by the system.

Where do claim forms go when they are submitted?
When an employee submits a claim form, the system uses the post to post reporting held in Resourcelink to go up the chain and look for an authoriser for that type of claim, i.e. expenses / overtime. Managers need to have an authorising role against their post to authorise claims. If a post is vacant or the post does not have an authoriser role, the system will ignore them and go up the chain to the next authoriser.

It is therefore crucial that post to post reporting is kept up to date. Managers can check who is reporting to them through the My People tab within their MyView Dashboard, if this is inaccurate managers should update their post to post information.