Top Tips for Managers

5 Top Tips for Managers:
(please also read top tips for employees as you will also benefit from these)
When you first start using MyView Dashboard:

1. Familiarise yourself with the guidance for authorising claims

Don't wait until claims start coming to you! 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.

2. Check that you have the correct access for a manager

As a manager, you should have:

- An **Authorisation widget** (grey box on front page) to allow you to authorise claim forms (if you can't see this on your home page, try clicking on the spanner icon first at the top left of your left hand menus on the home page, in case it just needs moved onto the page.
- The "**My People**" tab at the top left of the home page, this will allow you to view details of your employees.
- "My Delegations" on the left hand side menu list on the home page, this allows you to delegate the responsibility to authorise claims to another manager when you are on holiday.

3. Check that you can view your team (any employees who report to you)

- Within the "**My People**" tab on your home page you can view details of your team including vacant posts, you can also view details of individual employees by clicking on the icon next to their name (see guidance on the system for more details).
- Please **check that you have the correct employees in this list**, if you are missing any or have people in the list who you don't manage this can be changed by a post change form in HR Forms Online to change the post – post reporting for those posts.

Please check this list before employees start submitting claims, as you will only receive claims for employees within your "My People" tab.

4. Delegate your authorisations when on holiday

Before going on holiday, set up a delegation within "My Delegations" at the left hand side menu on your home page. This will allow another authorising manager to authorise claim forms while you are off.

5. Authorise forms quickly to avoid escalations

When a form sits with a manager for 10 days without any action (i.e. without the manager authorising or rejecting the claim) the form then escalates up the post reporting chain to the next authorising manager. It will then sit with the next authorising manager for 7 days without any action before rejecting back to the employee who then has to start the process again. Please consider the payroll deadlines and try to authorise forms timeously to avoid escalations. These time-out settings have been put in place so that forms cannot be ignored for long periods of time which is unfair on the employee.