

MyView Expenses

Step-by-Step Instructions for Approvers

This document contains step-by-step instructions for the approval or rejection of expense claims in MyView.

If you have any other questions that are not covered in this document, you should contact one of the below:

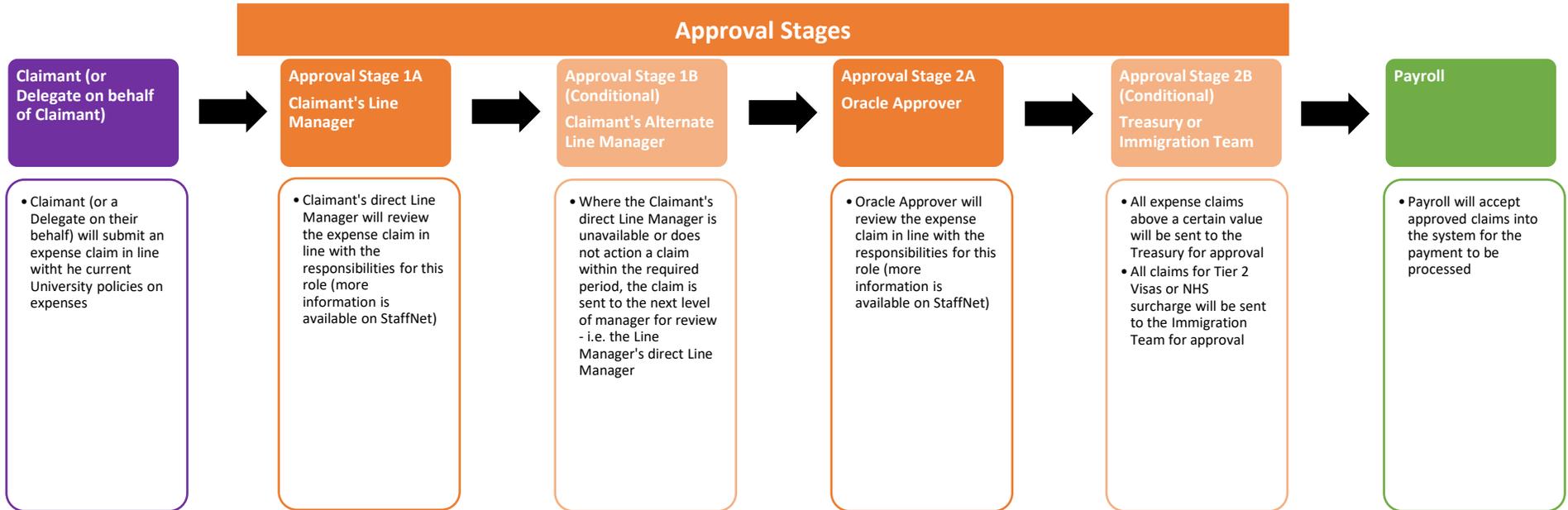
- For queries about your expense claim, contact Fees and Expenses (feesandexpenses@manchester.ac.uk)
- For queries or issues about using the MyView Expenses portal, contact MyView (myview@manchester.ac.uk)

More information about MyView can be found on [StaffNet](#).

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Overview of the MyView Expenses approval process



Methods for reviewing a claim

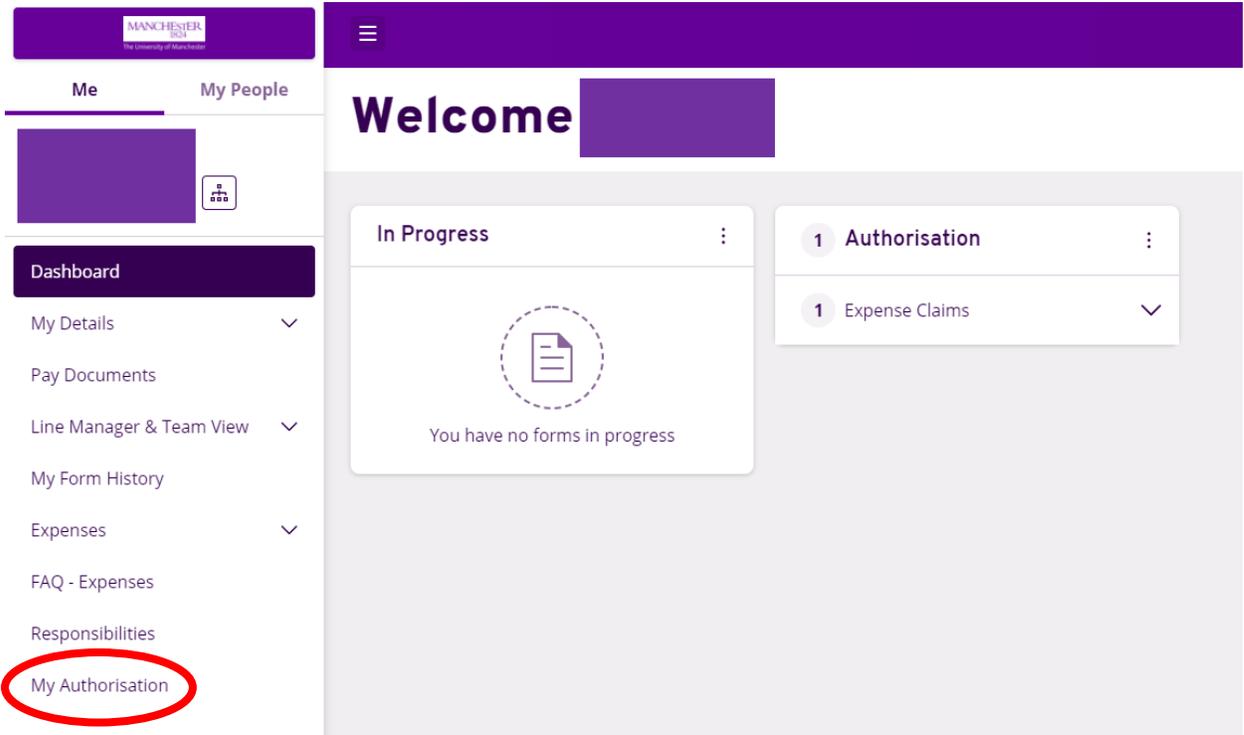
There are two ways that an approver can review an expense claim in MyView:

1. Via 'My Authorisation'
2. Via the Authorisation widget

Both methods, including how to add the widget to your MyView dashboard, are outlined in this document. Details about how to access MyView can be found on [StaffNet](#).

Method 1 – Via ‘My Authorisation’

1. Click on ‘My Authorisation’ in the menu panel on the left-hand side of the MyView dashboard (you may need to expand this panel if viewing on a device with a small screen).



2. The next screen will show you a list of all claims waiting for your authorisation – click on the Description link (circled in red) to view the claim details.

Dashboard / Authorisation

Authorisation

1 Pending Authorisations | 1 Nearing Timeout | 1 Requests this month

Authorisation State: All | Timeout | Event Type: Expense Claims | Employee: [Redacted]

Results per page: 20 | Showing 1 result

Description	Event	Time Remaining ^	Submitted Date	Employee	
Test Claim Claim Value: 2.00	Expense Claims	1 Days	2 Feb 2022	[Redacted]	✓ ✗ ▾

- Review the claim as per the responsibilities of your approver role (see [here](#) for more details).

Authorise Expense Claim

Test Claim

Total Lines: 2 Total Value: £2.00

Authorisation Progress

Cost Centre:

Date of Claim	Group	Type	Value
02/02/2022	Accommodation	Accommodation Overseas	£1.00
02/02/2022	Accommodation No Receipt (Taxable)	Accommodation UK - No Receipt	£1.00

Your Expense Claim

Total Lines: 2
Total Value: £2.00

Buttons: Authorise All ✓, Reject All ✗, Cancel

Any claim lines with attachments will have a paperclip symbol next to the claim line value amount.

To view the attachments, click on the arrow at the end of the claim line (circled in red on the screenshot above) – this will expand the claim line as shown below:

Authorise Expense Claim

Test Claim

Total Lines: 2 Total Value: £2.00

Authorisation Progress

Cost Centre:

Date of Claim	Group	Type	Value
02/02/2022	Accommodation	Accommodation Overseas	£1.00

Your Expense Claim

Total Lines: 2
Total Value: £2.00

Buttons: Authorise All ✓, Reject All ✗, Cancel

Costs and Receipts

Description	Value	Currency	Date From	Date To
Test Item 1	£1.00	Sterling	01/02/2022	02/02/2022

Number of Nights: 1
Location: Manchester
Reason: Test

Attachments: [TestReceiptAttachmen... 11.7.KB](#)

Any attachments will be listed at the bottom of the expanded claim line – click on the link to view them.

4. Approve or reject each claim line as required, and then click on 'Submit Change'.

- To approve a claim line, click on the green tick mark
- To reject a claim line, click on the red X mark

Approved claim lines will move to the next stage, and rejected claim lines will be sent back to the Claimant. **Please note** that if you are rejecting a claim line, you should enter the reasons why in the 'Rejection Notes' box.

Authorise Expense Claim

Test Claim Form Info

Total Lines: 2 Total Value: £2.00

Authorisation Progress

Cost Centre:

Date of Claim	Group	Type	Value	
02/02/2022	Accommodation	Accommodation Overseas	£1.00	<input checked="" type="checkbox"/> <input type="checkbox"/>
02/02/2022	Accommodation No Receipt (Taxable)	Accommodation UK - No Receipt	£1.00	<input checked="" type="checkbox"/> <input type="checkbox"/>

Authorisation Notes 2000 characters remaining

Rejection Notes 2000 characters remaining

Your Expense Claim

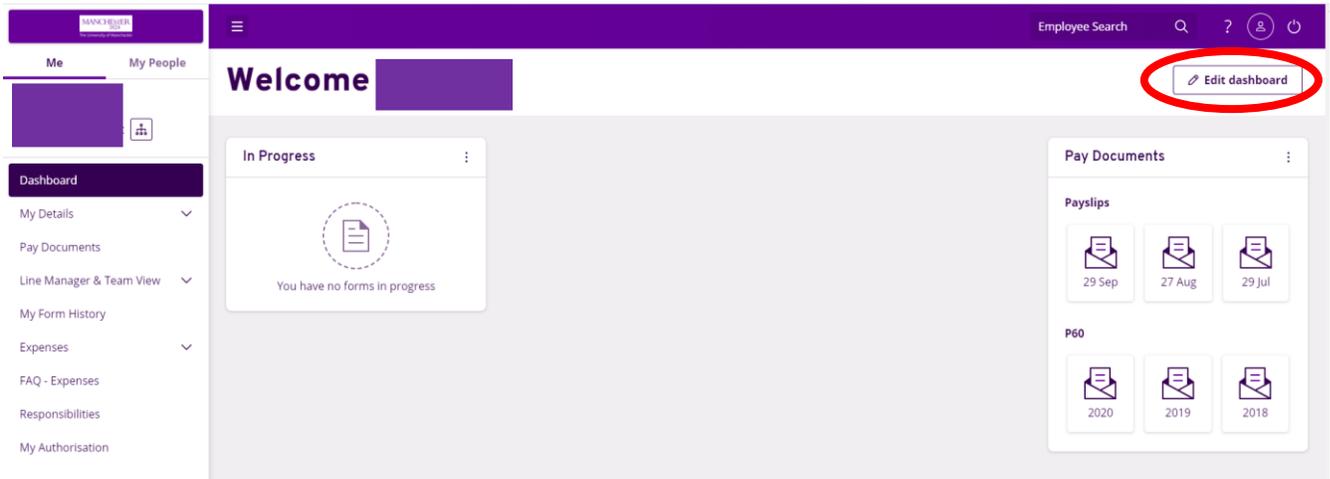
Total Lines: 2
Total Value: £2.00

Method 2 – Via the Authorisation widget

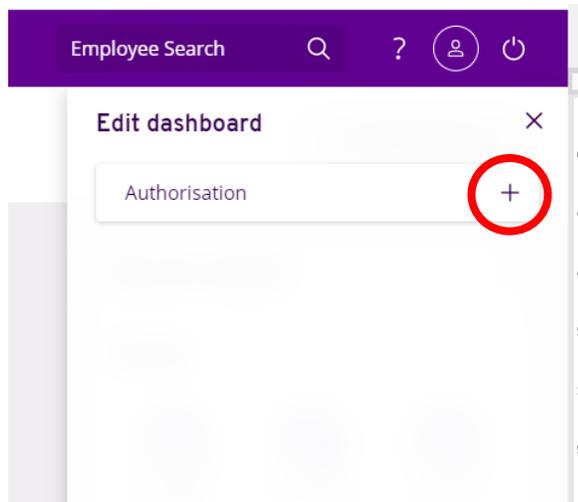
Please note that you may need to add the Authorisation widget to your MyView dashboard – this only needs to be done once. When the widget is set to appear, it will always show when you log in to MyView.

How to add the Authorisation widget to your MyView dashboard

1. Click on 'Edit dashboard' near the top right-hand corner of the MyView dashboard.



2. A menu panel will open with a list of available widgets – click on the 'plus' symbol next to 'Authorisation'.

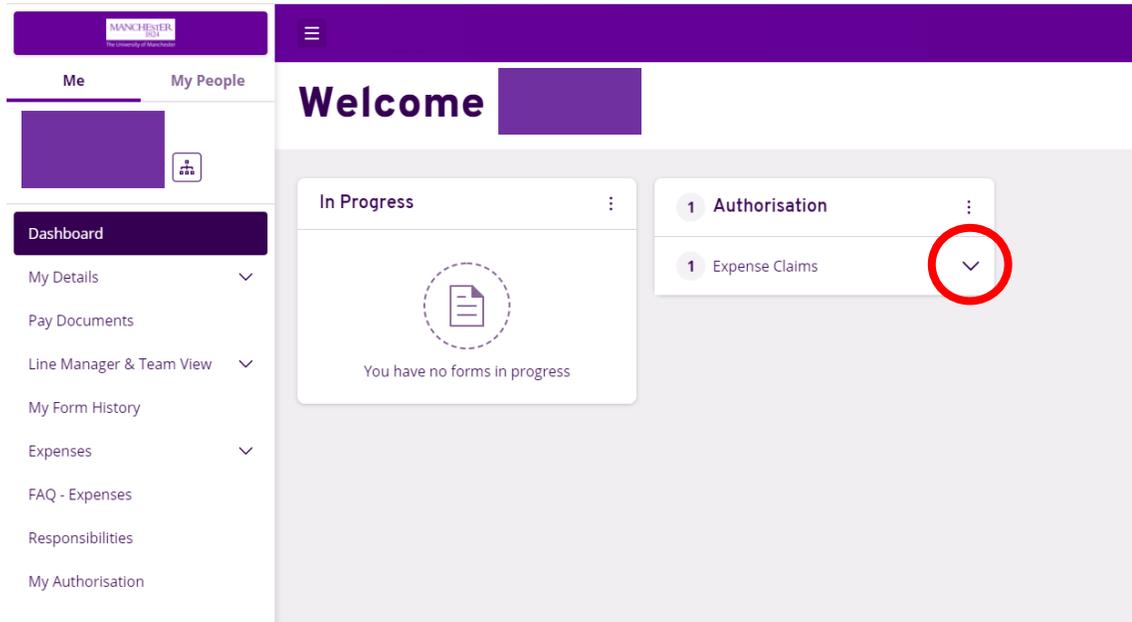


N.B. if you cannot see the list of widgets, please contact MyView for advice (contact details are at the beginning of this document).

3. You will now be able to see the Authorisation widget on your dashboard.

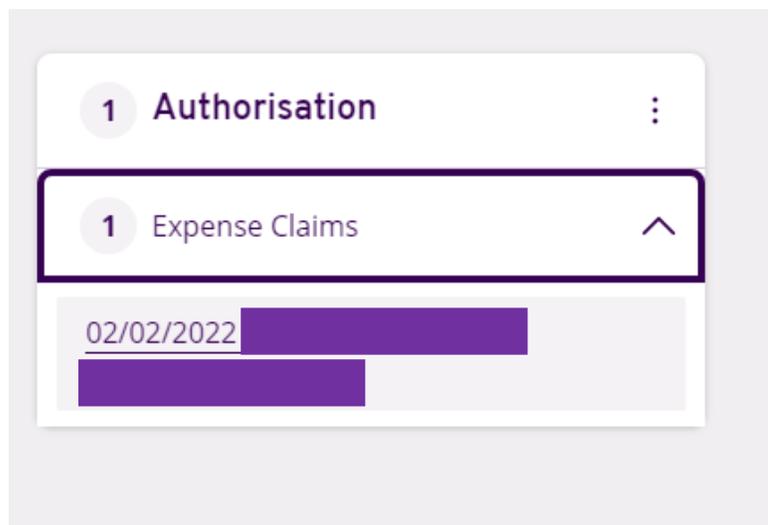
Review and action a claim via the Authorisation widget

1. In the widget, click on the downward arrow next to 'Expense Claims'.



2. You should now be able to see a list of claims waiting for you to action, listed in date order (oldest one at the top). Click on the name of the employee whose claim you want to review – this is a hyperlink to open the claim details.

N.B. The name has been covered in this screenshot.



- Review the claim as per the responsibilities of your approver role (see [here](#) for more details).

Authorise Expense Claim

Test Claim

Total Lines: 2 Total Value: £2.00

Authorisation Progress

Cost Centre:

Date of Claim	Group	Type	Value
02/02/2022	Accommodation	Accommodation Overseas	£1.00
02/02/2022	Accommodation No Receipt (Taxable)	Accommodation UK - No Receipt	£1.00

Your Expense Claim

Total Lines: 2
Total Value: £2.00

Buttons: Authorise All ✓, Reject All ✗, Cancel

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To view the attachments, click on the arrow at the end of the claim line (circled in red on the screenshot above) – this will expand the claim line as shown below:

Authorise Expense Claim

Test Claim

Total Lines: 2 Total Value: £2.00

Authorisation Progress

Cost Centre:

Date of Claim	Group	Type	Value
02/02/2022	Accommodation	Accommodation Overseas	£1.00

Costs and Receipts

Description	Value	Currency	Date From	Date To
Test Item 1	£1.00	Sterling	01/02/2022	02/02/2022

Number of Nights: 1
Location: Manchester
Reason: Test

Attachments: [TestReceiptAttachmen... 11.7.KB](#)

Your Expense Claim

Total Lines: 2
Total Value: £2.00

Buttons: Authorise All ✓, Reject All ✗, Cancel

Any attachments will be listed at the bottom of the expanded claim line – click on the link to view them.

4. Approve or reject each claim line as required, and then click on 'Submit Change'.

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Approved claim lines will move to the next stage, and rejected claim lines will be sent back to the Claimant. **Please note** that if you are rejecting a claim line, you should enter the reasons why in the 'Rejection Notes' box.

Authorise Expense Claim

Test Claim

Total Lines: 2 Total Value: £2.00

Authorisation Progress

Cost Centre:

Date of Claim	Group	Type	Value	
02/02/2022	Accommodation	Accommodation Overseas	£1.00	<input checked="" type="checkbox"/> <input type="checkbox"/>
02/02/2022	Accommodation No Receipt (Taxable)	Accommodation UK - No Receipt	£1.00	<input checked="" type="checkbox"/> <input type="checkbox"/>

Authorisation Notes

Rejection Notes

Your Expense Claim

Total Lines: 2

Total Value: £2.00

Submit Change

Cancel