

Integrated HR/Payroll System Project

Employee MyView

Submitting a Travel & Subsistence claim

Document:	Employee MyView – Submitting a Travel & Subsistence claim
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1 Employee MyView – Submitting a Travel & Subsistence Claim

Document Control

1.1 Table of Contents

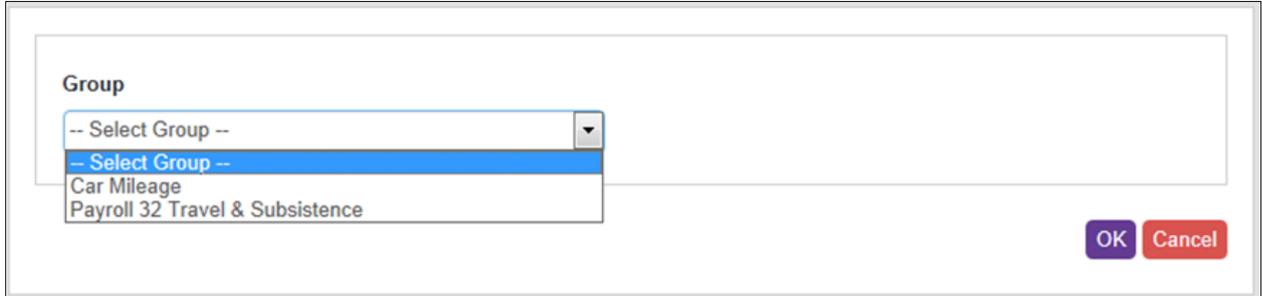
1	Employee MyView – Submitting a Travel & Subsistence Claim.....	2
	Document Control	2
1.1	Table of Contents	2
1.2	Change History.....	2
2	Submitting a Travel & Subsistence claim.....	3
3	Miscellaneous Error Messages.....	6
3.1	Alerts	6

1.2 Change History

VERSION	STATUS	DATE	AUTHOR	SUMMARY OF CHANGES
1.1	DRAFT	14/10/15	CIP Team	Initial Draft

2 Submitting a Travel & Subsistence claim

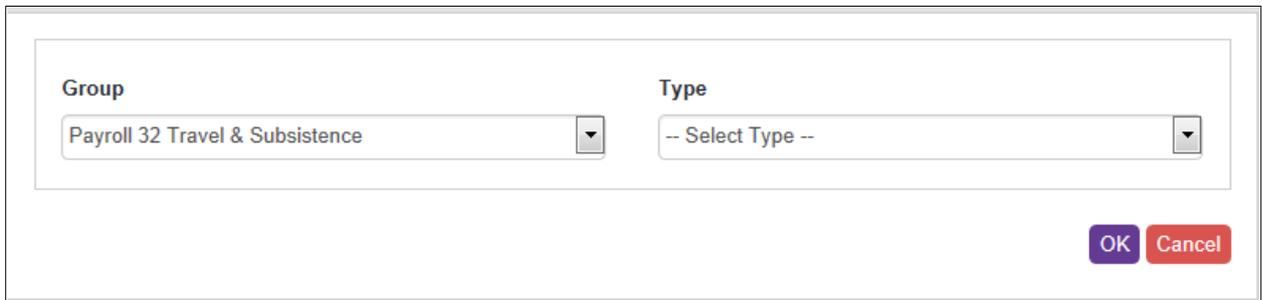
- 2.1 At [Group], click on drop down menu



A screenshot of a web form showing a dropdown menu for the 'Group' field. The menu is open, displaying options: '-- Select Group --', '-- Select Group --' (highlighted in blue), 'Car Mileage', and 'Payroll 32 Travel & Subsistence'. There are 'OK' and 'Cancel' buttons at the bottom right of the form area.

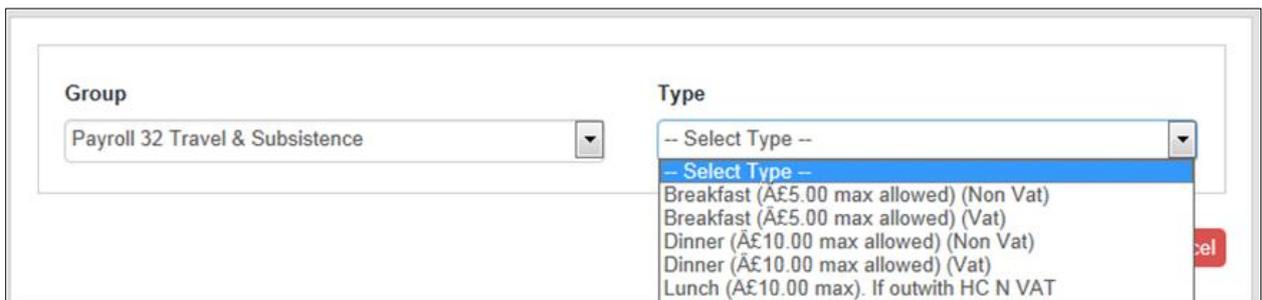
- 2.2 Select group [Travel & Subsistence] – (MANDATORY)

Travel and Subsistence screen will appear



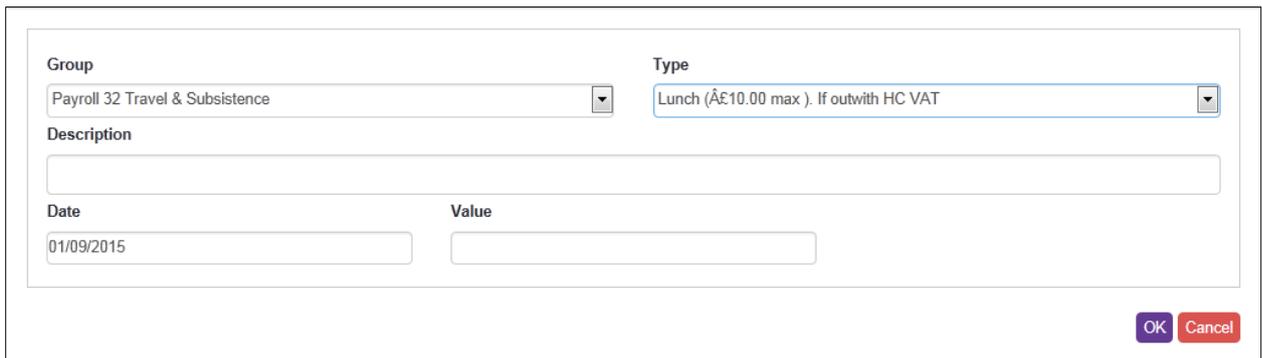
A screenshot of the 'Travel and Subsistence' screen. It features two dropdown menus: 'Group' (set to 'Payroll 32 Travel & Subsistence') and 'Type' (set to '-- Select Type --'). There are 'OK' and 'Cancel' buttons at the bottom right.

- 2.3 At [Type] click on drop down menu



A screenshot of the 'Travel and Subsistence' screen with the 'Type' dropdown menu open. The menu lists several options: '-- Select Type --', '-- Select Type --' (highlighted in blue), 'Breakfast (A£5.00 max allowed) (Non Vat)', 'Breakfast (A£5.00 max allowed) (Vat)', 'Dinner (A£10.00 max allowed) (Non Vat)', 'Dinner (A£10.00 max allowed) (Vat)', and 'Lunch (A£10.00 max). If outwith HC N VAT'. There is a 'Cancel' button visible on the right side of the menu.

- 2.4 Select [Subsistence Type] (MANDATORY)



A screenshot of the completed 'Travel and Subsistence' form. The 'Group' dropdown is set to 'Payroll 32 Travel & Subsistence' and the 'Type' dropdown is set to 'Lunch (A£10.00 max). If outwith HC VAT'. Below these are fields for 'Description', 'Date' (set to '01/09/2015'), and 'Value'. There are 'OK' and 'Cancel' buttons at the bottom right.

- 2.5 At [Description] type in description of claim **(including the time that you were away from base to justify subsistence allowance)**

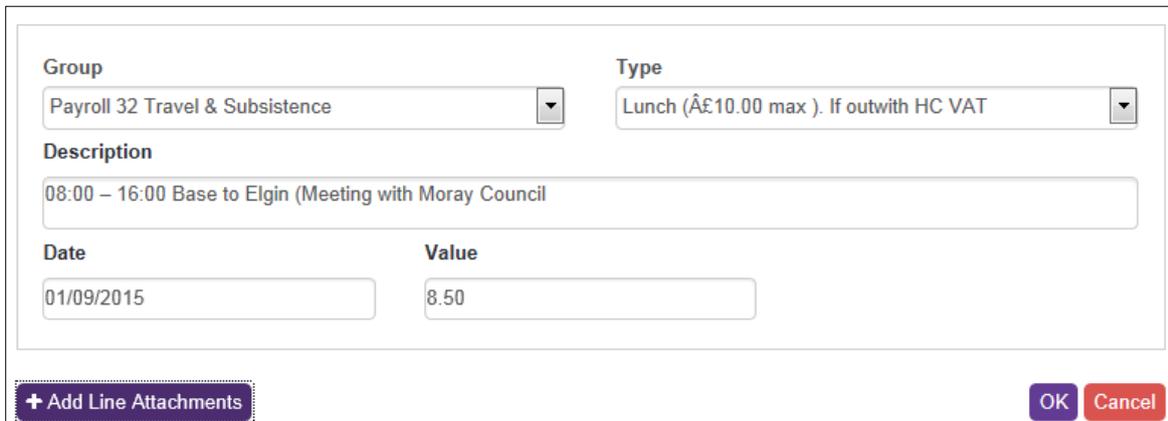
Example 08:00 – 16:00 Base to Elgin (Meeting with Moray Council) (MANDATORY)

PLEASE NOTE THAT IF THERE IS NO TIME AWAY FROM BASE IN THE DESCRIPTION OF 5.23 THE CLAIM WILL BE REJECTED

- Only claim Dinner/Bed/Breakfast if claiming accomodation and meal
- If only claiming for a meal then choose either Lunch or Dinner

- 2.6 At [Date], calendar will pop up on screen, select date of subsistence - **(MANDATORY)**
- 2.7 At [Value], type in value of receipt. **(MANDATORY)**

NOTE : If value is more than what is showing in [Type] description then a warning message will appear. Parameters have been set up in the Expense Module to allow thresholds for claims.



The screenshot shows a form for adding a new expense line. It includes dropdown menus for 'Group' (Payroll 32 Travel & Subsistence) and 'Type' (Lunch (Â£10.00 max). If outwith HC VAT). The 'Description' field contains '08:00 – 16:00 Base to Elgin (Meeting with Moray Council)'. The 'Date' field is set to '01/09/2015' and the 'Value' field is '8.50'. At the bottom, there is a '+ Add Line Attachments' button and 'OK' and 'Cancel' buttons.

- 2.8 Click [OK]

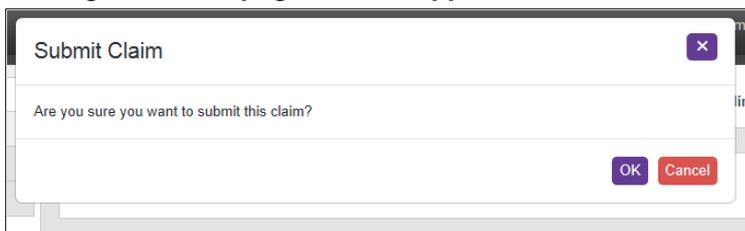
Journey will appear in summary sheet

Default Cost Centre - Open				
Date	Group	Type	Value	
01/09/2015	Payroll 32 Travel & Subs...	Lunch (Â£10.00 max). If...	£8.50	 ▼
01/09/2015	Car Mileage		75	 ▼
			Total Value	£8.50
			Total Miles	75

If you click on [Save] this will allow you to leave the application and log back in at a later date and continue with your expense claim. However it is only when you click [Submit] that the claim will be sent to your Manager. To [Submit] continue as follows:

- 2.9 Click [Submit]

Message from webpage box will appear



The screenshot shows a 'Submit Claim' dialog box with the question 'Are you sure you want to submit this claim?'. It has 'OK' and 'Cancel' buttons at the bottom right and a close button (X) at the top right.

➤ 2.10 Click [OK]

Submitted Summary page will appear

Default Cost Centre - Submitted				
Date	Group	Type	Value	
01/09/2015	Car Mileage		75	▼
01/09/2015	Payroll 32 Travel & Subsidi...	Lunch (Â£10.00 max). If...	£8.50	▼
			Total Value	£8.50
			Total Miles	75

A confirmation email will be sent from the HR Portal to your Manager / Budget Holder to review
Process END

3 Miscellaneous Error Messages

You may get an error message advising “STOP” “MyView : Session Ended – Your request cannot processed at this time”. Click on the [**Return to home page**] button on the bottom right hand side of the screen to log back into your MyView session.

Please report this error to: FSAT advising what task you were trying to perform during your MyView session.

At the moment **you will not be able to access the MyView Self Service outside of the HC network**

3.1 Alerts

Please be advised that the following message is only an Alert – we ask that you have some patience and try again later
r to amend your existing details

