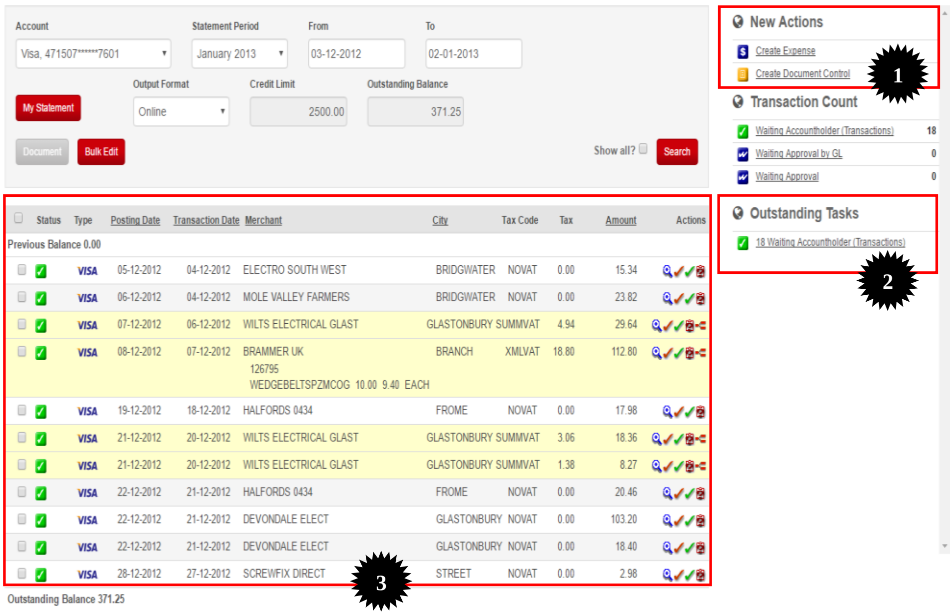
# Quick Reference Guide

## *MiVision Home Page*

1. New Actions – Account Holder actions are listed here. Click the links to create new claims and document controls.
2. Outstanding Tasks – a list and links to Account Holder outstanding tasks. For Supervisors, this will include transactions awaiting approval.
3. Outstanding Transactions/Expenses – a list of transactions requiring verification by the account holder. There are several account holder action icons beside each transaction.

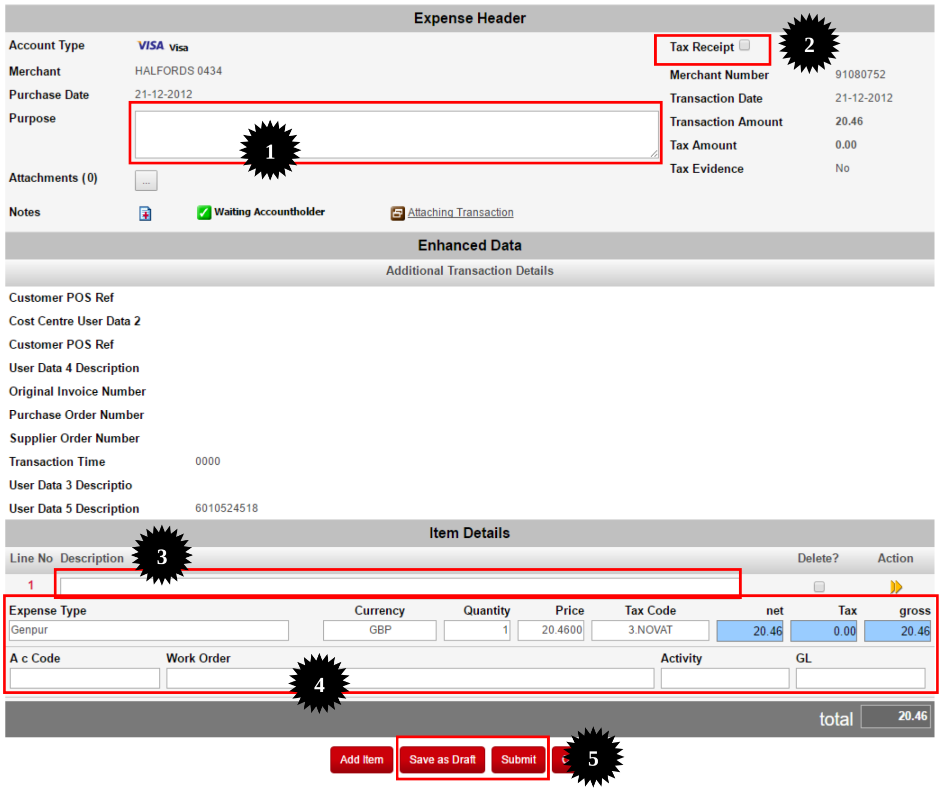



## *Verify a Credit Card Transaction*

To verify a transaction:

Select the Verify Transaction icon next the transaction on the Home Page or from the Transactions list.

1. Enter a Purpose (a reason) for the Expense.
2. Tick whether Tax Receipt/Documentation is available.
3. Enter a short Description of what was purchased
4. Check/enter the Expense Type, Tax Code and GL Account and update if required.
5. Click the Submit button. If not ready, click the Save as Draft button to edit and submit later.

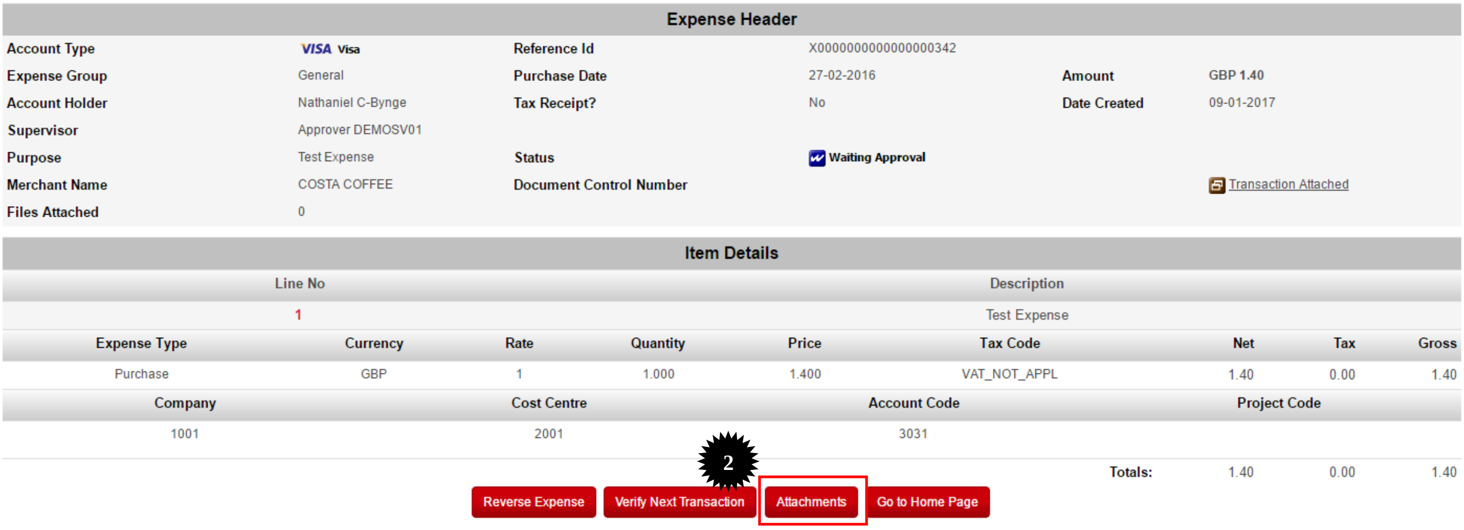



**Tips:**

- Create a Document Control report after processing all available transactions rather than several reports.
- If you need to share the cost of a transaction with other areas of your business or projects, when verifying a transaction press the 'Add Item' button to split the transaction value across multiple GL codes.
- *If there are General Ledger codes that you use often then you can create Personal GL Codes that allow you to assign a frequently used GL code to transactions easily. Go to Profiles, Personal GL Codes and set them up!*

## *Adding Attachments to an Expense*

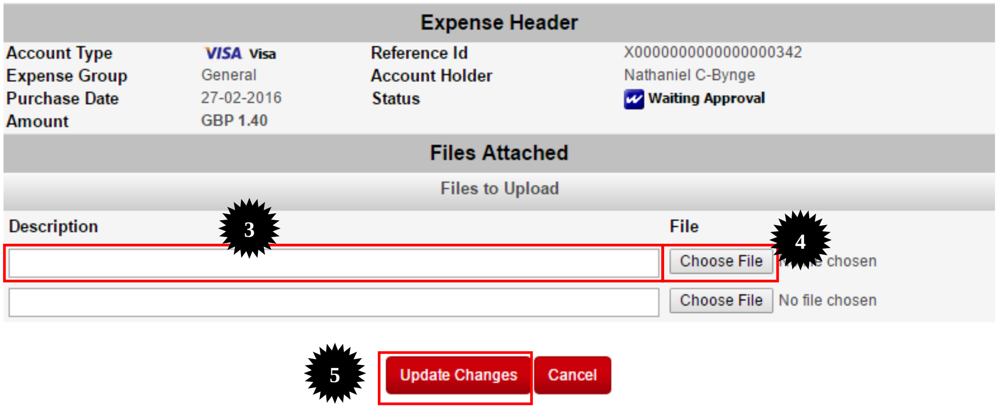
1. When you click the Submit button at the end of the process of verifying a transaction, the Expense Details page is displayed.
2. To attach files and/or receipts, etc., click the Attachments button to open the File Attachments page in a new window.




3. Type in the Description of the file to be attached.
4. Click the Browse… button and select the file to be attached via the Choose File to Upload dialog.

You can add more than one file at a time if necessary.

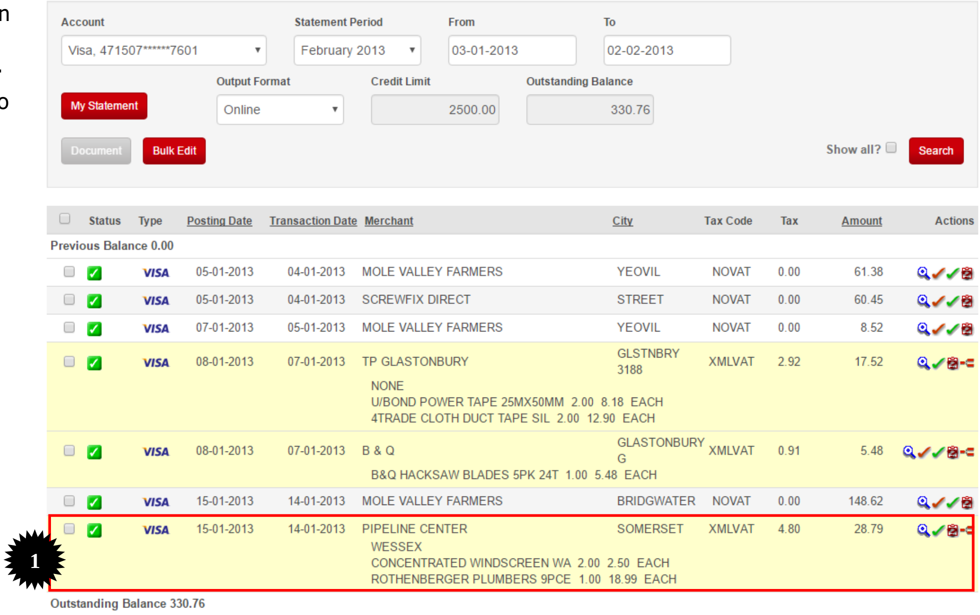
5. Click the Update Changes button to upload the file(s).



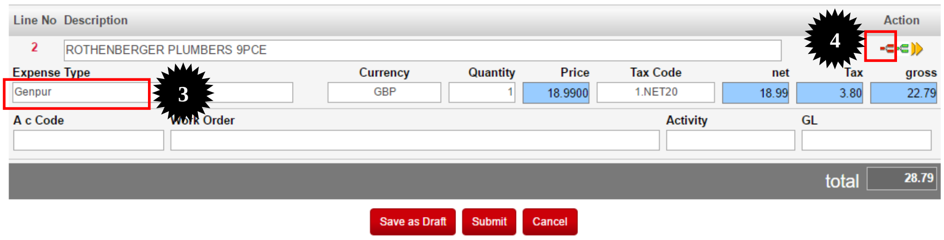
# Split a Level 3 Transaction

1. A Level 3 transaction can be identified on a user's Home Page by the fact that the detail line has a pale yellow background.

   Select the Verify Transaction icon next to the transaction on the Home Page or from the Transactions list.




2. On the Verify Expense page fill out the Purpose and Description fields where necessary.
3. Specify an Expense Type.
4. To split a line item – located in the Item Details section further down the page – click the icon – this is located at the right hand end of the Description for the line item.



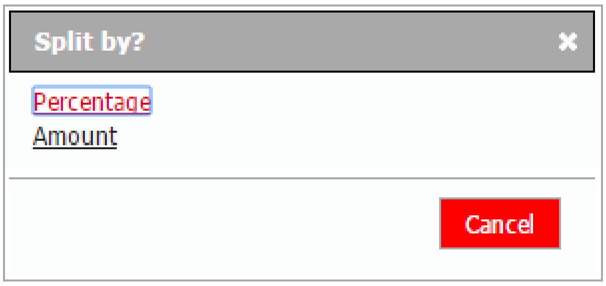

5. From the popup window select how you want to split the line item:

   Percentage – splits the Gross value of the item by percentage.

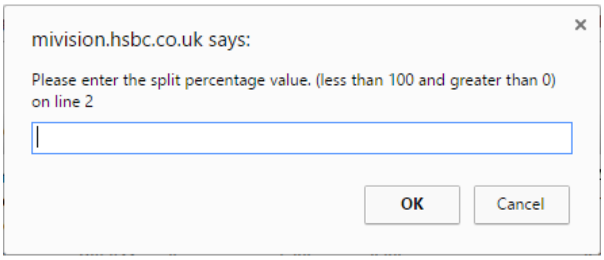
   Quantity – splits the Quantity value by numerical count.

   Amount – splits the Net value by amount.

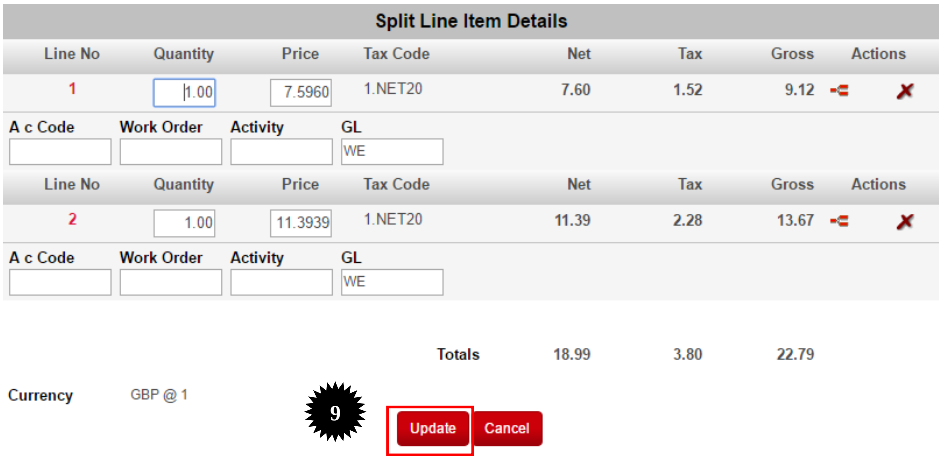
   N.B. Options may vary by expense type.




6. A message box similar to this one for the percentage split asks for the split value.
7. Type in the relevant value and click the OK button to display the Expense Line Item Split page in a new window.




8. The split displayed here is for the Percentage split. The other split methods display almost identically with minor differences according to the split type.
9. Modify the editable fields as required and click the Update button.



## *Change Your Password*

If you need to change your password:

1. Select the dropdown arrow button to the right of your name – top right of the screen and click Profiles from the displayed menu.
2. At the bottom of the Profile Detail page, select the Change Password button.
3. Enter the Current Password, then enter the New Password and confirm the new entry.
4. Click the Change Password button.