



Manager Dashboard

Manager Dashboard – CoreInsight – My Team Expense Claim History

28/09/2020

Overview

CoreInsight is a reporting tool which will allow managers to view the 'My Team Expense Claim History Report'. Once the system has been embedded into the workforce, other reports may become available for managers to view. This CoreInsight report will provide users with real time information.

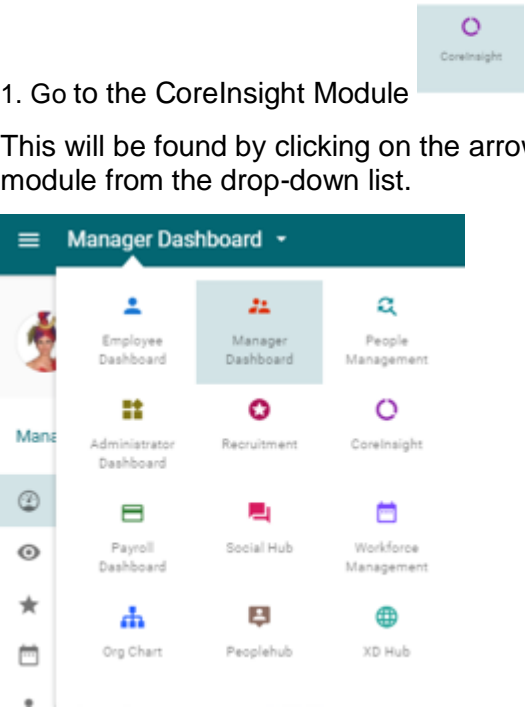
1. Manager Dashboard - CoreInsight

1.1 CoreInsight– View ‘My Team Expense Claim History Report’

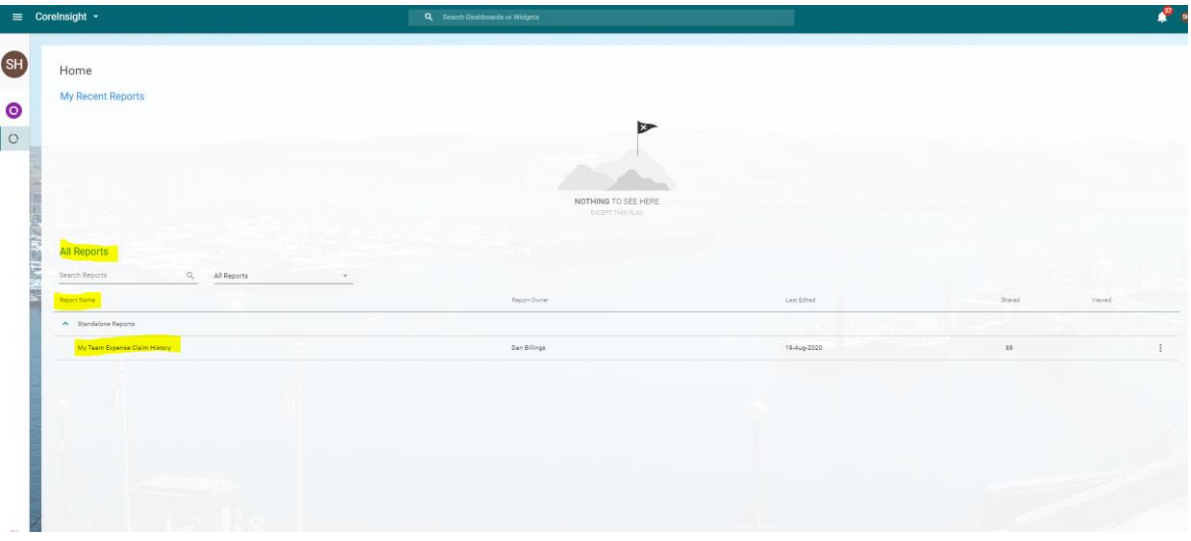
CoreInsight – View ‘My Team Expense Claim History Report’

1. Go to the CoreInsight Module

This will be found by clicking on the arrow at the top of your screen and selecting the correct module from the drop-down list.



2. You will be taken to the CoreInsight home page. All reports available to you as a Manager will be listed in the ‘All Reports’ section

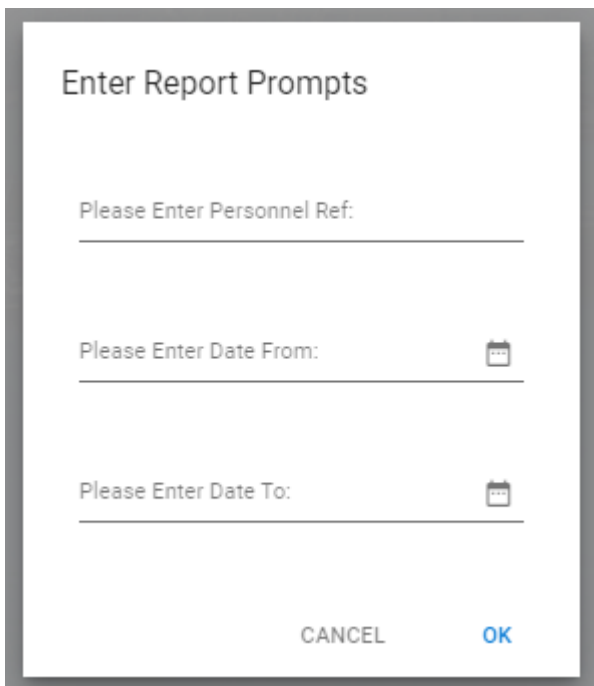


Report Name	Last Edited	Shared	Viewed
My Team Expense Claim History	19-Aug-2020	SS	

3. Click on the ellipses and select view. (please note that if you have already viewed this report in the past, it will be available to you by clicking on the – ‘My Recent Reports’ Image.

4. A ‘Enter Report Prompts’ box will appear. You can choose to enter the prompts which will restrict the data you can see, or you can simply click on ok.

- To enter the prompts
 - Enter the Personnel Number, if entering more than one personnel number ensure that you put a comma between each number (example 000165; 000062; 000163)
 - Enter Date From
 - Enter Date To
 - Click OK



The screenshot shows a dialog box titled "Enter Report Prompts". It contains three input fields: "Please Enter Personnel Ref:" with a text input line, "Please Enter Date From:" with a text input line and a calendar icon, and "Please Enter Date To:" with a text input line and a calendar icon. At the bottom, there are two buttons: "CANCEL" and "OK".

5. The next message will ask the following – ‘Would you like to be notified when the report has loaded?’

- Yes Please – the report will then run in the background and you will receive a notification message once it has been completed
- No I’ll Wait – you will watch the report run and when its finished the details will appear on screen
- No don’t ask me again – you will from this point on always see the report run on the screen and appear when ready.

Would you like to be notified
when the report has loaded?

- Yes please
- No - I'll wait
- No - don't ask me again

CANCEL

OK

Once the report is finished the results will appear.