Protective Marking: Official

Manager Dashboard

Manager Dashboard - Notifications

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Overview

The ‘Notification Centre’ allows the system to flag new notification and action requests for a Manager. Please also note, that you will also see any requests that you make as an employee, in the same place. Notifications are both for Employees & Managers.

The notifications will provide users with real time notification an example of this is: -

Actions

- Expenses
- Leave Requests

Notifications

- Employee changing personal details
- Employee updating their vehicle details

1.Manager Dashboard - Notifications

1.1 Notifications

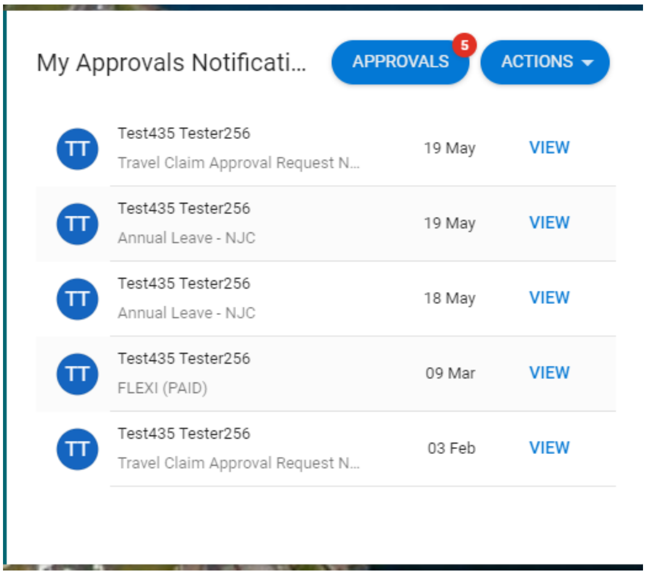
1.1.1 Manager Notifications

My Approvals Notifications Widget

1. When the Approvals button 🔔 7 has a red counter, this identifies that there are approvals/notifications which require actioning by a Manager. Managers can click on this bell and the notifications will appear.

> **Note:**
>
> Once you have clicked on the actual notification it will mark it as ‘Read’, however it will not disappear until it has been properly actioned but you will notice that the number of notifications will reduce.
>
> When an item is actioned (e.g. Approved/Rejected) via the ‘Notification Centre’ it is removed completely from the Approvals List. Where the same item is on multiple employees Approval Lists, the item is removed from all lists.
>
> A System Job will be run on a regular basis by the Systems Team to remove items from users’ notifications, once this has been run, items that have been actioned will be removed from the Approvals list. However, the system does retain history of all actions, which will be available to managers.
>
> Please note that managers can only use the Approval Widget to Approve Expense Claims or Annual Leave request. Timesheet claims are not approved in this widget - please see the Timesheet Transfer Manual.

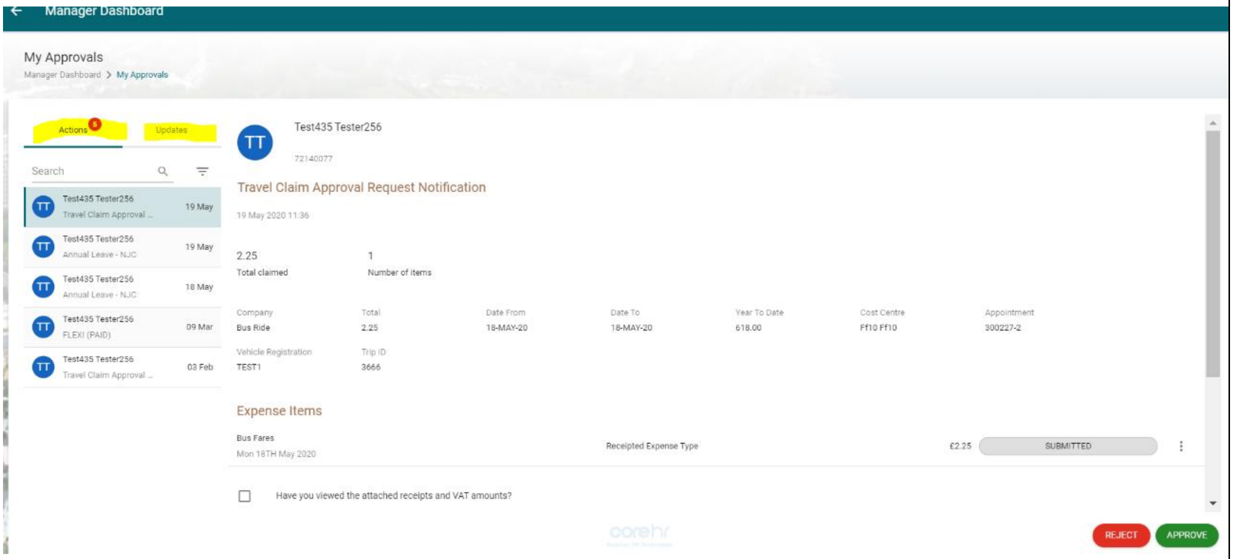
2. To deal with these notifications, you should access these via the My Approvals Notification Widget on the Manager Dashboard.



TT	Test435 Tester256 Travel Claim Approval Request N...	19 May	VIEW
TT	Test435 Tester256 Annual Leave - NJC	19 May	VIEW
TT	Test435 Tester256 Annual Leave - NJC	18 May	VIEW
TT	Test435 Tester256 FLEXI (PAID)	09 Mar	VIEW
TT	Test435 Tester256 Travel Claim Approval Request N...	03 Feb	VIEW

- You can Click on the Approvals button. This will open the My Approvals Widget or

- You can click on the View button on an individual notification, and it will open the approvals centre, with the specific item displayed (along with the other notifications in the menu on the left of the next screen)



Test435 Tester256 Travel Claim Approval ... 19 May
Test435 Tester256 Annual Leave - NJC 19 May
Test435 Tester256 Annual Leave - NJC 18 May
Test435 Tester256 FLEXI (PAID) 09 Mar
Test435 Tester256 Travel Claim Approval ... 03 Feb

Test435 Tester256
72140077

Travel Claim Approval Request Notification

19 May 2020 11:36

Total claimed	Number of items
2.25	1

Company	Total	Date From	Date To	Year To Date	Cost Centre	Appointment
Bus Ride	2.25	18-MAY-20	18-MAY-20	618.00	Ff10 Ff10	300227-2

Vehicle Registration	Trip ID
TEST1	3666

Expense Items

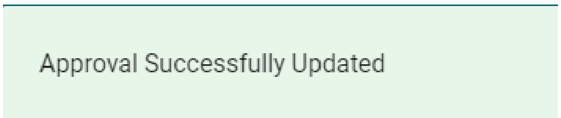
Bus Fares
Mon 18TH May 2020
Receipted Expense Type £2.25 SUBMITTED

☐ Have you viewed the attached receipts and VAT amounts?

- This screen consists of 2 tabs:
    - Actions Tab
    - Updates Tab
- Each tab will display a description for the approval/notification, and when it was generated.

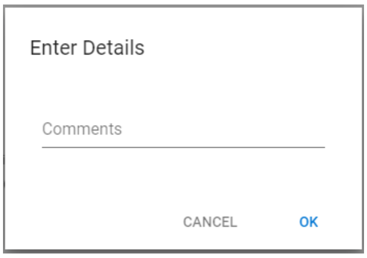
3. Click onto each of the Actions

- Read the information provided in the screen
- Tick the box to confirm that the details are correct
- Approve or Reject.
- If you Approve a message will appear to say ‘Approval Successfully Updated’



Approval Successfully Updated

- If you Reject, you will need to enter comments and click OK



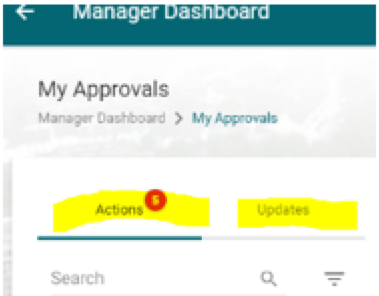
Enter Details

Comments

4. The Updates, are for Managers information only. Such as: -

- Cancellation of Annual Leave

- Employee on Sick Leave
- Feedback for Reviews
- Change of Bank Details


Manager Dashboard
My Approvals
Manager Dashboard > My Approvals
Actions 5
Updates
Search

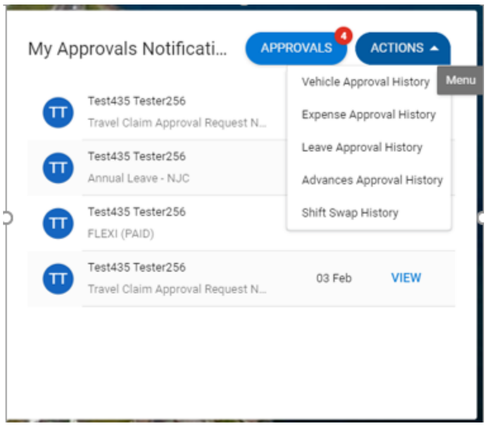
2.1 Notifications - History

2.1.1 Approval History

My Approvals History

1. Managers can also view the history of all actions. These are broken down into: -

- Vehicle Approval History
- Expense Approval History
- Leave Approval History


My Approvals Notificati...
APPROVALS 4
ACTIONS
Vehicle Approval History
Menu
Expense Approval History
Leave Approval History
Advances Approval History
Shift Swap History
TT
VIEW

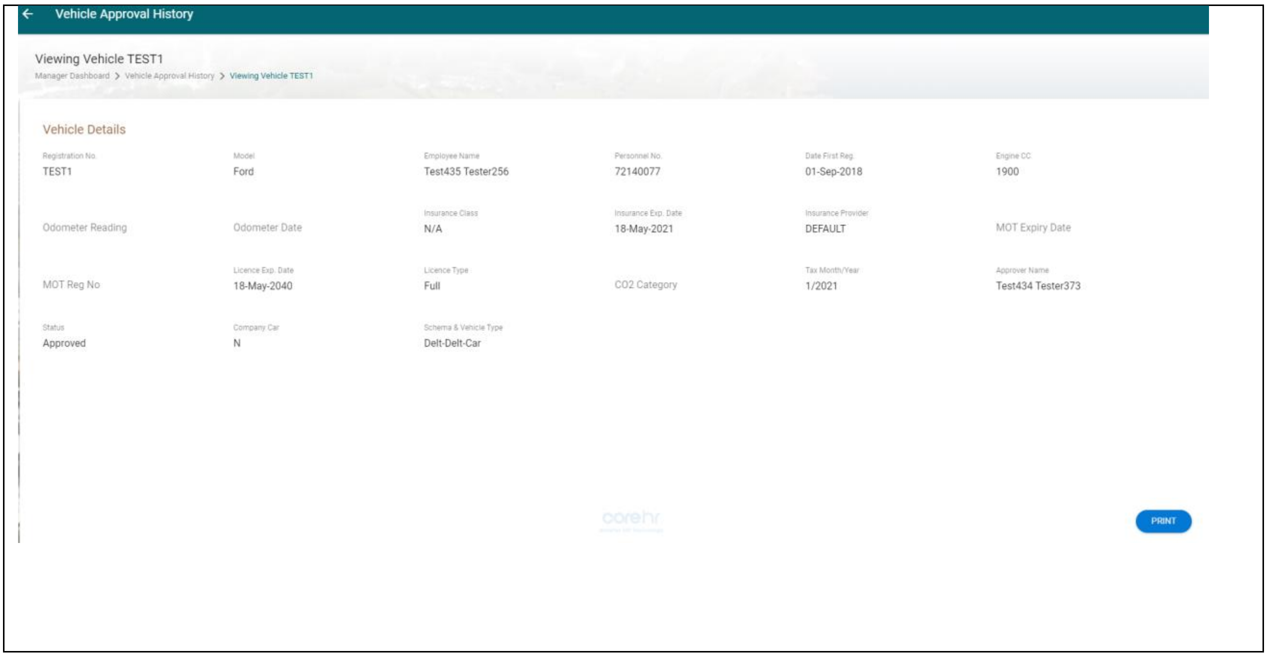
Test435 Tester256
Travel Claim Approval Request N...

Test435 Tester256
Annual Leave - NJC

Test435 Tester256
FLEXI (PAID)

Test435 Tester256
Travel Claim Approval Request N... 03 Feb

- Simply click on the Actions button, choose which type of approvals you wish to view. Once in the detail, click on the view button and the information will appear. Mangers can print this if necessary.


Vehicle Approval History
Manager Dashboard > Vehicle Approval History > Viewing Vehicle TEST1
corehr
PRINT

Viewing Vehicle TEST1

Vehicle Details

Registration No.
TEST1

Model
Ford

Employee Name
Test435 Tester256

Personnel No.
72140077

Date First Reg.
01-Sep-2018

Engine CC
1900

Odometer Reading

Odometer Date

Insurance Class
N/A

Insurance Exp. Date
18-May-2021

Insurance Provider
DEFAULT

MOT Expiry Date

MOT Reg No

Licence Exp. Date
18-May-2040

Licence Type
Full

CO2 Category

Tax Month/Year
1/2021

Approver Name
Test434 Tester373

Status
Approved

Company Car
N

Schema & Vehicle Type
Delt-Delt-Car

3.1 Additional notes to Managers for Approving Claims

3.1.1 Notes to Managers for approving claims

Notes to Manages for approving claims

Approving a claim as a Manager

- Check each line of the expense claim. For each line you will be able to view the details of the claim, view the additional information relating to the claim (if valid for the expense type on show) and record notes as the approver if you want to send a message back to the employee. These notes allow you to record feedback about this expense type within the claim, but a separate comment box will be available for comments to be captured if you choose to reject the claim.
- Before being able to approve, you will be asked two specific questions. These must both be answered by ticking the appropriate box.
    - **Have you viewed the attached receipts and VAT amounts?**
      This is an official record that you as a manager have witnessed the receipts for the expenses being claimed and therefore you must take the time to view the receipts before ticking this box. You must view and validate the receipts for all items on the claim.
- The expense line on the summary screen will clearly identify whether this is a receipted expense or not by showing the words ‘Receipted Expense Type’ on the display line.
- If your organisation has opted to attached receipts to the system, then
    - To view the associated receipt, you must click on the ellipses at the end of the appropriate line, choose the option to ‘View details. The view will refresh showing all of the input details and there will be an ‘Actions’ button in the top right of the screen. Click on this and choose view receipt. A pop up will then appear in the bottom left hand corner of the screen, click on this to open, and view the receipt.
    - Once viewing is complete, click on the X in the top left of the screen to close and click on the back arrow to take you back to the full claim view.
    - If there is a valid reason for not reviewing the receipts before approval, then this must be captured in the ‘Why not?’ space under the question.
- If your organisation has opted to have paper submissions, then the employee should have provided the receipts to you in advance to be reviewed in paper format.
    - **I confirm that the above details are correct.**
    - Again, this acts as an official record that you have viewed and considered the content before approving the claim to be paid. This means that you have accepted the responsibility and confirmed that the content is correct and appropriate.
    - To approve simply click on the ‘Approve’ button on the bottom right of the screen.
- **How to view previous expenses for each employee in the team**

- A CoreInsight report is available to all managers to view previous expense claims for individual employees or everyone in the team. This can be accessed by going to CoreInsight and use the following [CoreInsight – My Team Expense Claim History manual]() for details on how to use this report.