



## Manager Dashboard

### Manager Dashboard – Expenses Widget – Create Proxy Trip

21/09/2020

# Table of Contents

- Overview..... 3
- 1.Manager Dashboard ..... 4
  - 1.1 Expense Widget ..... 4
    - 1.1.1 Expense Widget – Create a Proxy Trip ..... 4



# Overview

The 'Expenses Widget' allows Managers to input expense claims on behalf of their employees. This acts as a proxy, however, please note that employees should input their own expenses apart from exceptional circumstances e.g. they are on sick leave etc

# 1. Manager Dashboard

## 1.1 Expense Widget

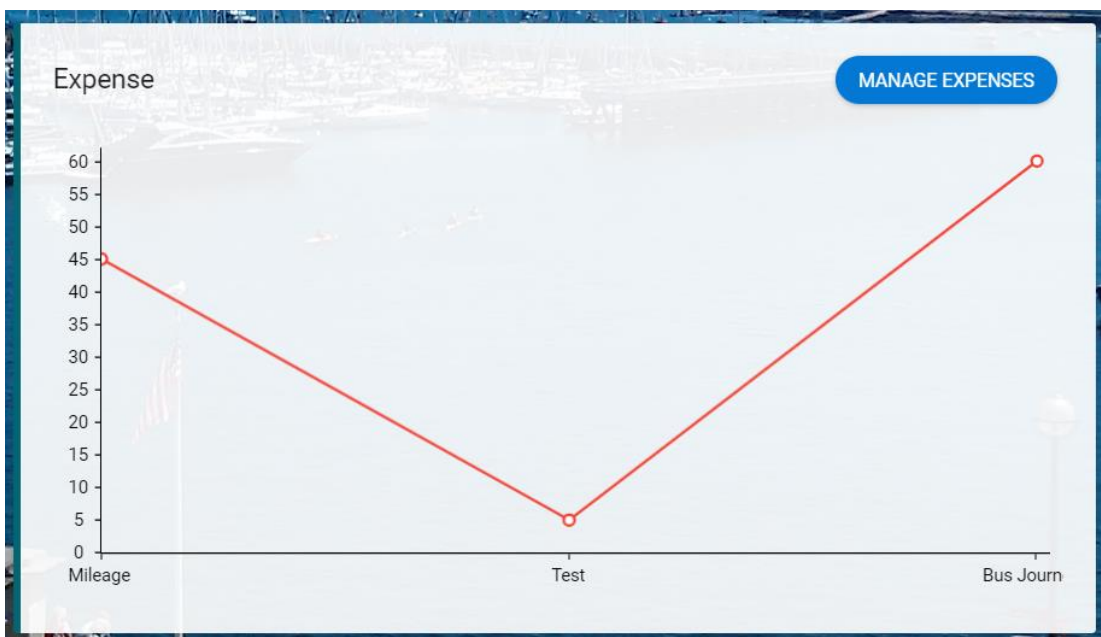
### 1.1.1 Expense Widget – Create a Proxy Trip

How to use the Expense Widget

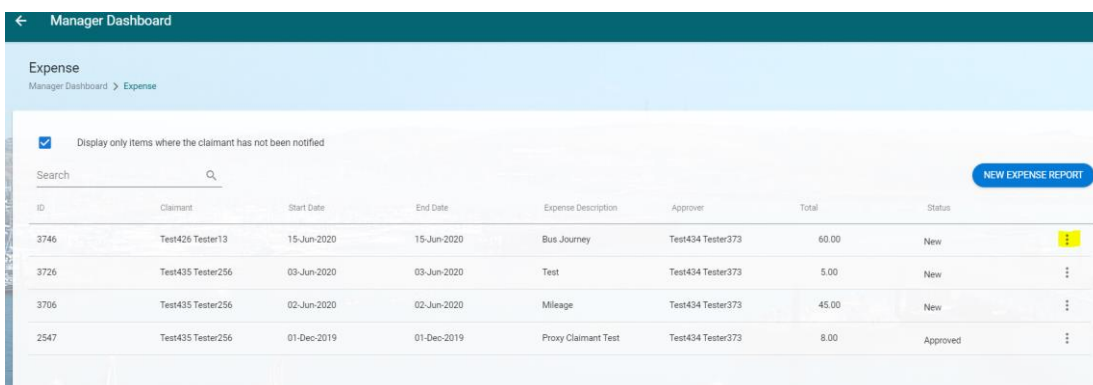
1. Go to the Manager Dashboard

You will see the Expense Widget

Click on the Manage Expenses Button



2. The Expense screen will open. This will list any claims the Manager has created on behalf of their Employees. The user can scroll through these to review and check the status (Approved; New; Paid etc).



The screenshot shows the 'Expense' screen with a table of claims. The table has columns for ID, Claimant, Start Date, End Date, Expense Description, Approver, Total, and Status. A search bar and a 'NEW EXPENSE REPORT' button are also visible.

ID	Claimant	Start Date	End Date	Expense Description	Approver	Total	Status
3746	Test426 Tester13	15-Jun-2020	15-Jun-2020	Bus Journey	Test434 Tester373	60.00	New
3726	Test435 Tester256	03-Jun-2020	03-Jun-2020	Test	Test434 Tester373	5.00	New
3706	Test435 Tester256	02-Jun-2020	02-Jun-2020	Mileage	Test434 Tester373	45.00	New
2547	Test435 Tester256	01-Dec-2019	01-Dec-2019	Proxy Claimant Test	Test434 Tester373	8.00	Approved

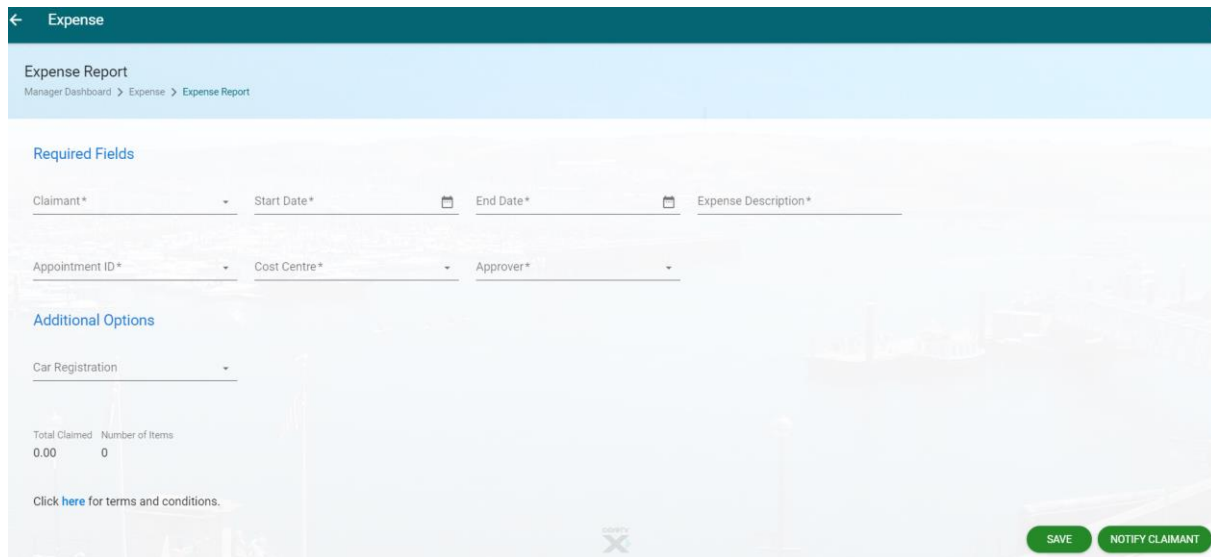
3. From this page the user can either

- Create a new Expense Report

Or

- Click on the ellipses at the end of the screen (highlighted above), and
- View/Update the Claim
- Notify Claimant
- Delete the Claim (dependent on its status, if it has been paid, you cannot delete it)

4. To create a new Expense Report, click the 'New Expense Report' button



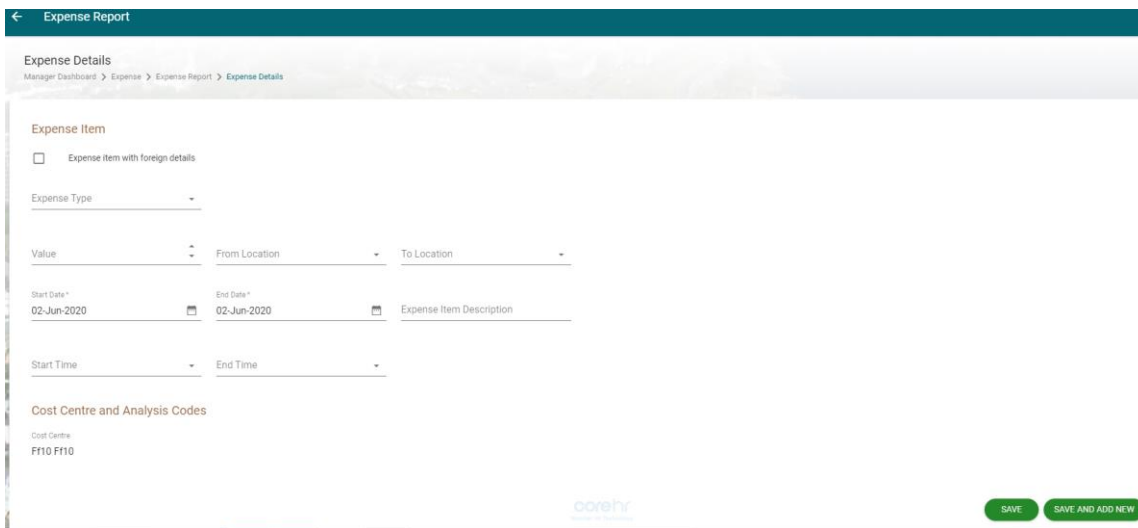
- Enter the following fields
  - Claimant Name (Employee)
  - Start Date
  - End Date
  - Expense Description
  - Appointment ID (Position employee is claiming for)
  - Cost Centre (Unless this is the Home Cost Centre, if so, leave blank)
  - Approver (enter your name as Manager)
  - If this is a mileage claim, you must enter the Car Registration (Please note if your employee does not have a vehicle registered in CoreHR, you will be unable to enter a claim. A Car would need to be registered prior to a claim being created.)
  - Press Save, if you do not save, an error message will appear, you need to save before you can move on to the next step
  - Once you have saved the following message will appear

Expense successfully created, proceed to add expense items

You are now ready to enter the expense details

Click on the 'New Expense Item' Button


NEW EXPENSE ITEM



You now need to complete the following details – Please note that all fields with a \* are mandatory


- Tick the box if the Expense item has foreign details
- Enter the Expense Type
- Air Fares
- Bus Fares
- Car Parking (No Vat Receipt)
- Car Parking (With Vat Receipt)
- Car Rental Costs
- Eye Spectacles – Contact Lens
- Eye Test
- Fuel Cost
- Mileage
- Passenger Miles
- Receipt Information (you need to ensure you select the correct receipt item from the list, if you do not, you will get an error message)
- Receipt Available to Upload
- No Receipt Available
- Submit Paper receipt separately to our expense administrator
- Enter the Value for the Claim
- From Location
- To Location
- Start Date\*
- End Date\*

- Expense Item Description
- Start Time
- End Time

Next Save your claim. Click on the  button. You can come back to this later if you need to amend it.

Or

Click Save and Add New  to create another claim

You now must Notify Claimant, by clicking this button, the employee (claimant) will be notified that you have input their expenses claim on their behalf 



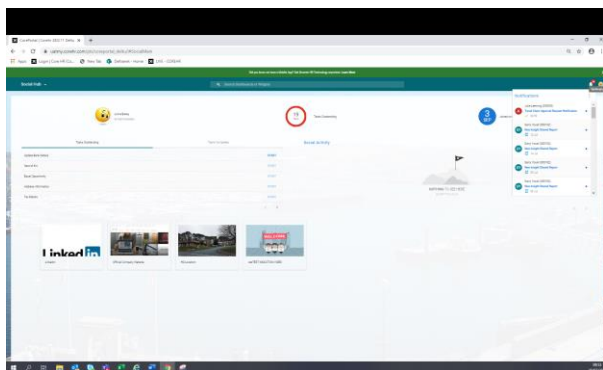
The screenshot shows a web form for entering an expense claim. At the top, there is a dropdown menu for 'Car Registration' with 'TEST1' selected. Below this, a summary row shows 'Total Claimed' as 5.00 and 'Number of Items' as 1. A link is provided to 'Click here for terms and conditions.' The main section is titled 'Expense Items' and contains a table with the following data:

Expense Type	Start Date	End Date	From	To	Units	Value	
Bus Fares	03-Jun-2020	03-Jun-2020	Plymouth	Windsor House		5.00	

At the bottom right of the form, there are two buttons: 'SAVE' and 'NOTIFY CLAIMANT'.

The Employee will receive a notification that the claim has been entered on their behalf and they will then need to follow the correct process to submit the claim for payment.

Once the Employee has logged into their Employee Dashboard, and submitted the claim, the Manager will receive a notification advising that the employee has submitted the expense claim.



Click the necessary buttons highlighted below and click the Approve button.

**Manager Dashboard**

**My Approvals**  
 Manage Dashboard > My Approvals

**Julie Leeming**  
000003

**Travel Claim Approval Request Notification**

Date Submitted: 28 Jul 2022 09:30

265.00 Total claimed    1 Number of Items

Description	Total	Date From	Date To	New To Date	Cost Centre	Appointm.	Vehicle Registration	Trp ID
Flights London	265.00	28-Jul-20	28-Jul-20	0:00	1714 1714	302198-15	W934-634	296

**Expense Items**

Air Fares  
Tue 28<sup>th</sup> Jul 2022    Received Expense Type    £265.00    SUBMITTED

Have you covered the attached receipts and VAT amounts?

Why Not?

Please review the T&Cs that relate to this request.

I confirm that the above details are correct

**Expense**    **MANAGE EXPENSES**

Category	Expense Amount
1bike Mileage T	0
Mileage Test	30
Flight To Lor	265