

Manager Self Service Delegated Access: View my employee's expenses/claims

This guide will help you use Manager Self Service Delegated Access to view employee expenses and claims history and export this information on behalf of a delegating manager.

Please ensure you have read the HR Self Service Privacy and Terms of Use document before exporting information, especially if accessing remotely.

View expenses/claims:

As a delegated user you can view expenses and claims that have been input and approved via Self Service. You will be able to view these for staff that are 1-3 levels below the delegating manager in the reporting hierarchy.

Click on 'View my employee's expenses' or 'View my employee's claims' from the Manager Self Service Delegated Access menu.

You will be taken to the Expenses Guidance & Home Page/My Employee's Claims summary screen. A list of the claims made by the staff will be listed at the bottom of the screen. 10 rows are displayed at a time, so you may need to click on the 'Next 10' button to display more rows.

Searching for a claim:

You are able to use the search parameters to search for specific claims or a group of claims. You can search by:

- Manager Name - restrict your search by a particular manager name if required.
- Manager Asg. No. - restrict your search by a manager's OAN if required.
- Expenses Reference (ERI)/Claim Reference (CRI) - if you know the Expense/Claim Reference Identifier (the unique number given to a claim) you can search for this.
- Employee Name - if you only want to see a specific employee's claims.
- Claim Period - search for the month the claim was for. Please note you will need to search for the month name (not abbreviated) and the year, e.g. January 2014.
- Employee Assignment No. - if you only want to see claims relating to an employee's specific assignment (if they have multiple assignments).

Once you have chosen your search parameters, click on 'Go' and the relevant claims will be displayed at the bottom of the screen.

When you wish to remove the search parameters and display all of the claim rows again, click on 'Reset All'.

View Claim Details:

In order to view the full details of a claim:

1. Click on the 'Select' circle for the relevant claim and then click on the 'View Claim Details' button.
2. You will be taken to the 'View Complete Employee Expense Claims/View Completed Employee Claim' screen, which will list the full details of the claim.
3. When you are finished, click on the 'Cancel' button to return to the summary screen.

Export Claim Details:

To export the full details of a claim to Excel:

1. Click on the 'Select' circle for the relevant claim and then click on the 'Export Claim Details' button.
2. A file download box will appear and you will need to select 'Open' or 'Save' depending on whether you want to view or save the claim details. Excel will then open the document containing all of the claim details.

Export Claim Summary:

To export a high level summary of all of the staff claims to Excel:

1. Click on the 'Export Claim Summary' button. Alternatively, you can narrow the claims exported by using the Search parameters outlined above and then select 'Export Claim Summary'.
2. A file download box will appear and you will need to select 'Open' or 'Save' depending on whether you want to view or save the claim details. Excel will then open the document containing the claim summary details.

Security:

When exporting data into Excel it is important to password protect any documents you may save or subsequently send. Documents should be saved in a secure area on KCC machines.

Exporting data when using Manager Self Service Delegated Access remotely is prohibited in any circumstance.

Help and Support:

If you have any additional queries or require further support, please raise a case on the ServiceNow portal.