Core Expense Portal V28

User Guide for Manager Dashboard (approver)

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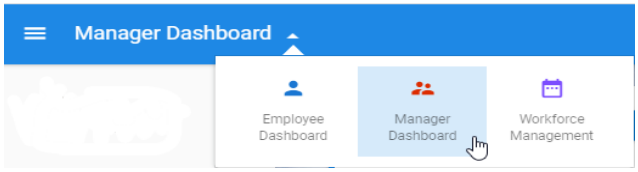
1 APPROVING IN CORE PORTAL

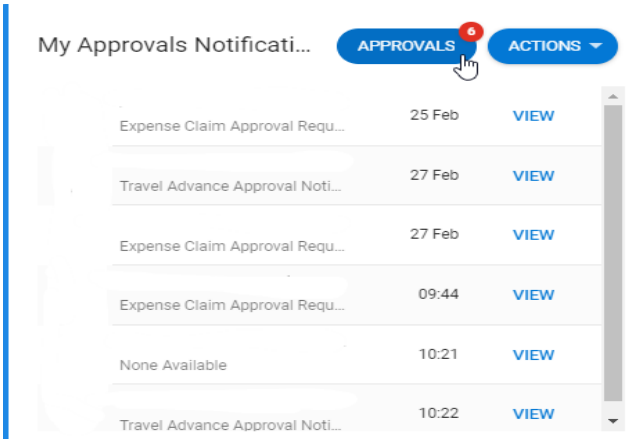
1.1 EXPENSE TRIP APPROVAL

Go to Manager Dashboard in Core Portal.

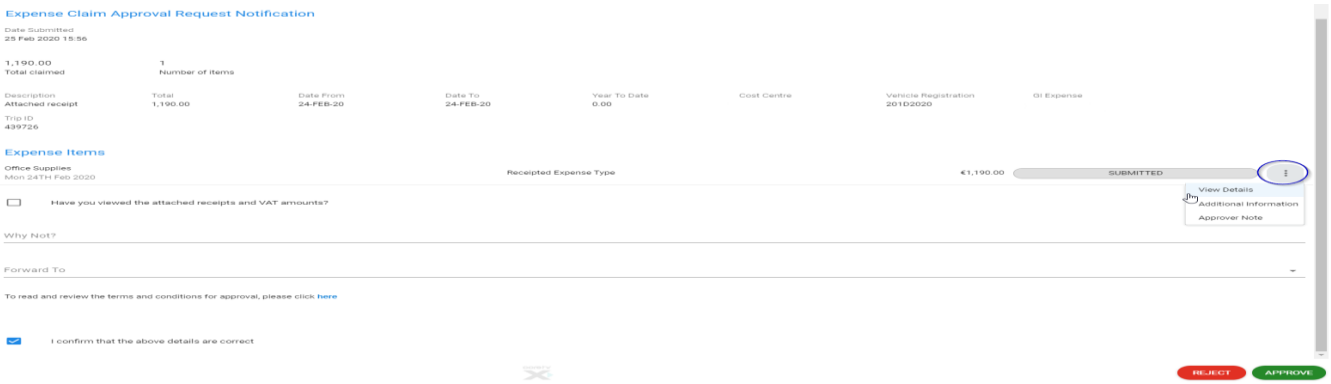


1.2 VIEWING OF ONLINE RECEIPT AND APPROVAL OF SUBMITTED CLAIM

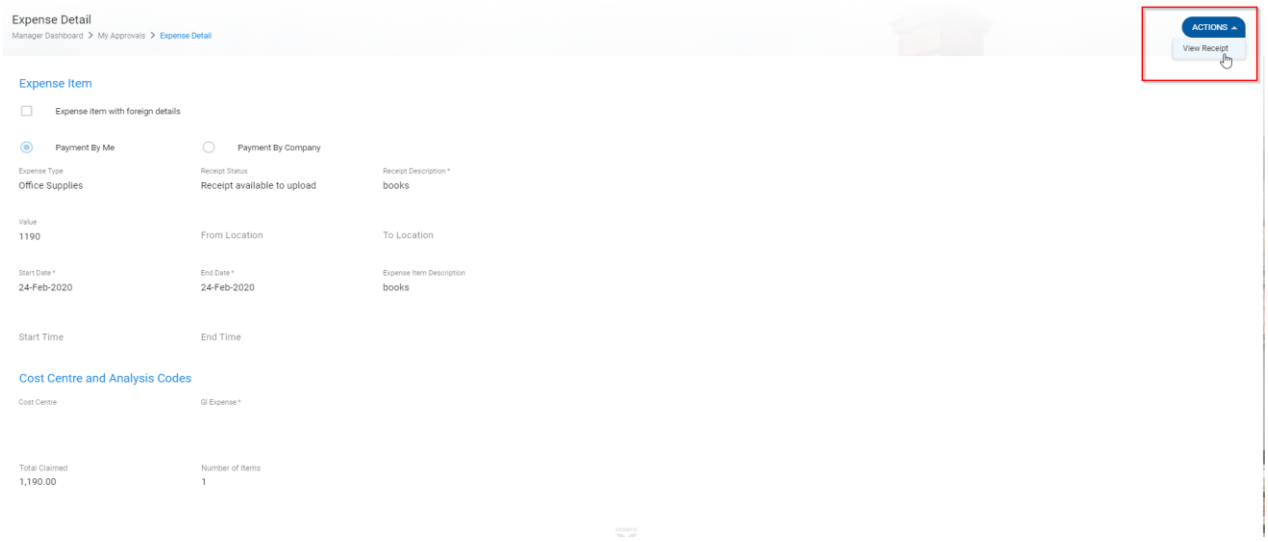
Click on “View” button for all Expense Trip information entered by the Claimant.



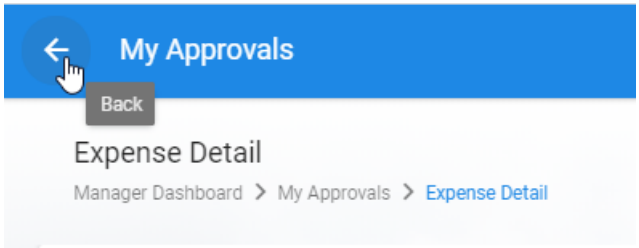
Then click in to the claim, a new window with claimant name and staff number will open, click on 3 dots button and view details.

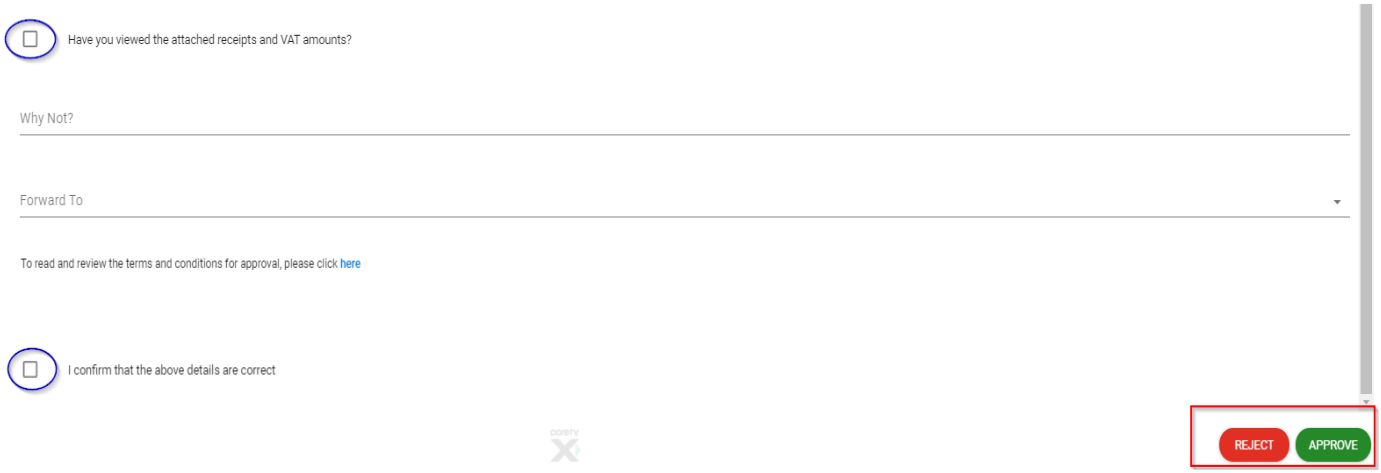


The Expense detail information of the claim will open on a new screen. To view attached receipts of the submitted claim, click on the blue button (Actions) and view receipt. Ensure the receipts are attached per claim. Depending on the format of attached receipts, the approver will be able to see the image (jpg) or have the option to download (pdf, jpg, jpeg, word, excel files)



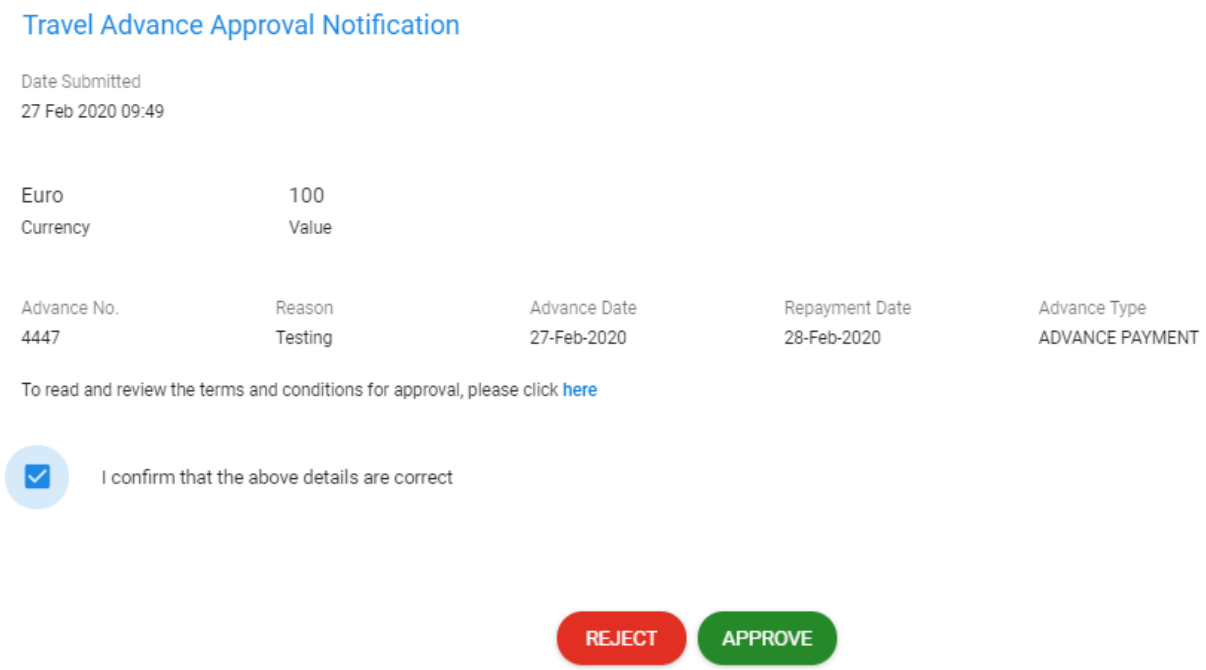
Then back to My Approvers, fill in the receipt data, confirm that you have checked the expense claim reported and press Approve if you are agreed or press Reject if expense details are incorrect or a receipt is not attached or the description is not clear and full.





1.3 APPROVING ADVANCES

For Advances the following pop up will appear and click on “View” button. Tick the “I confirm that the above details are correct” tick box and press Approve or press Reject and write the reason.



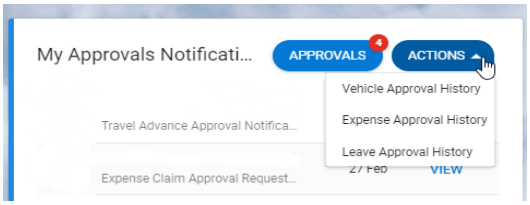
1.4 APPROVING CLAIMANT CARS

For Claimant Car Approval, the following pop up will appear and click on “View” button to view all Car information entered by the Claimant.

Click the “I confirm that the above details are correct” tick box and press Approve or press Reject if car details are not filled fully.

1.5 APPROVING HISTORY

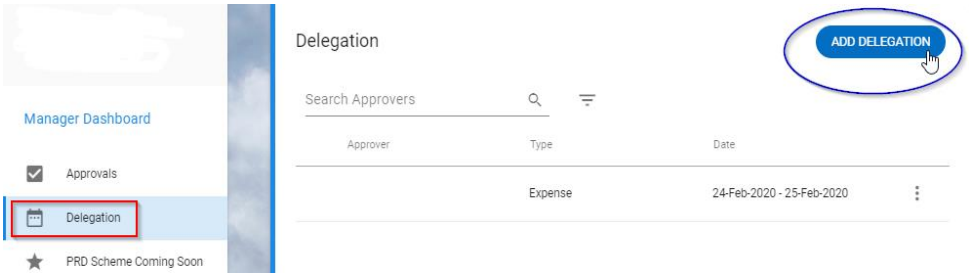
The approved expenses, cars, advances can view or print in History. Click on Actions and choose the necessary history.



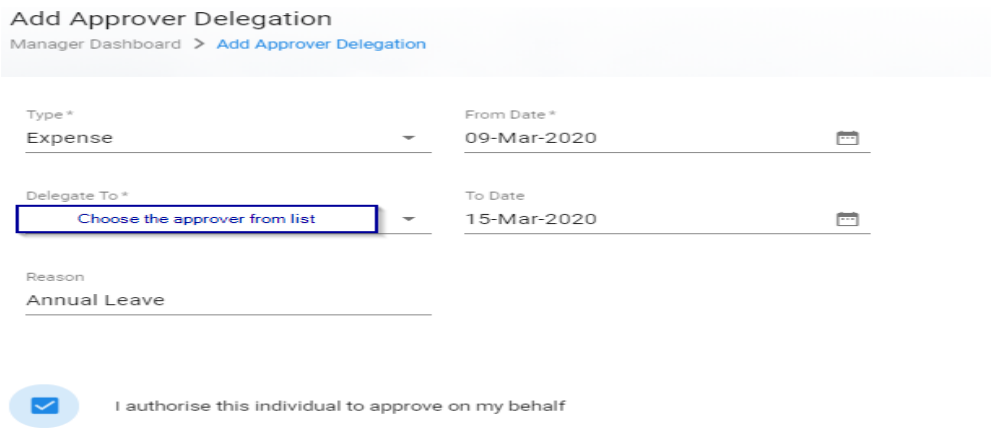
2 DELEGATION OF APPROVAL

When going on annual leave or extended leave an approver has the option to delegate their approvals to a colleague (same level or higher level than themselves). To do so they need to navigate to the Manager's Dashboard; here they will see the Delegation section. The next step is to click "Add Delegation" the following screenshot will appear.

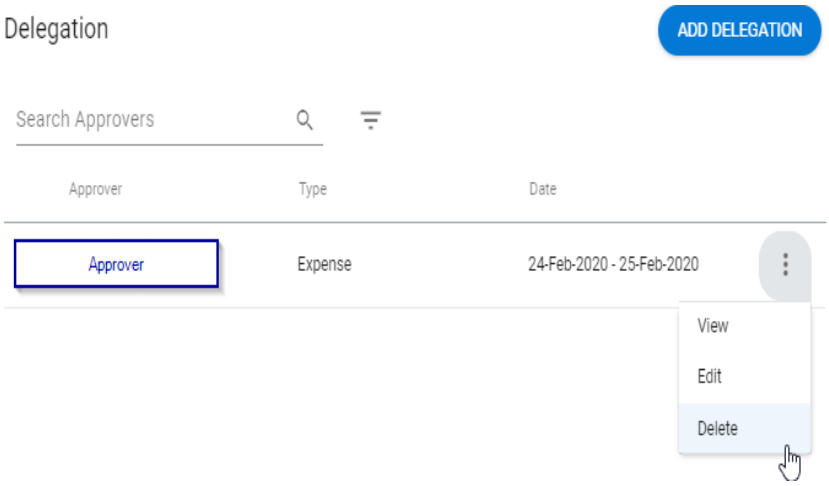
2.1 NEW DELEGATION

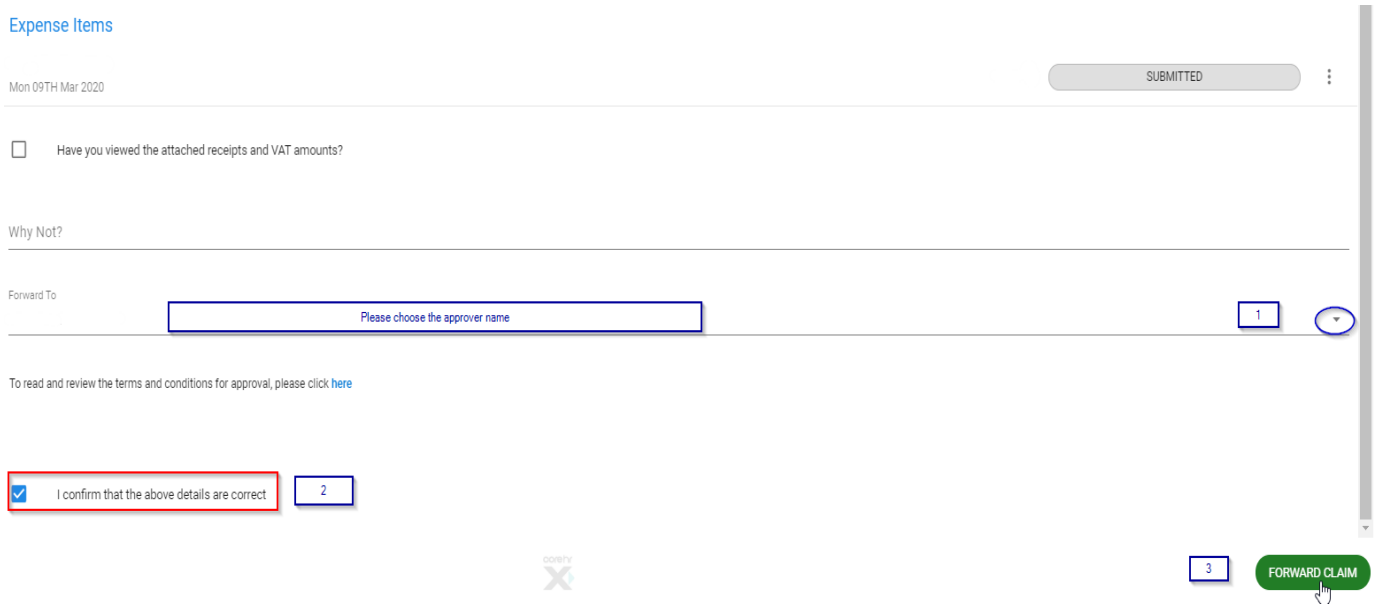
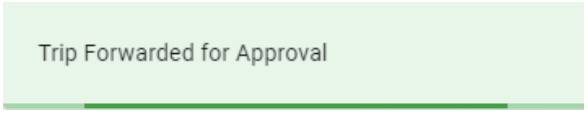


The approver must then select who they want to delegate to, for what dates, complete the reason for the delegation, tick that they agree to the declaration and press Save.



Delegating approval means that for the specified period every expense claim, advance or car approval that is sent to that approver for approval will be forwarded on to the selected delegated approver instead for approval. Also the approver can choose, edit or delete the delegation approver/s from delegation list.



2.2 FORWARD TO

If the approver would like to forward the claim to different approver. Please go to Approvals section, click "View", choose the necessary approver, tick the confirmation and click "forward claim".