

## Manager Self Service: View my employee's expenses/claims (including how to export)

This guide will help you use Manager Self Service to view your employee's expenses and claims history and export this information.

### View expenses/claims:

You can view all your current direct reports' expenses and claims that have been input and approved via Self Service. Click on 'View my employee's expenses' or 'View my employee's claims' from the Manager Self Service menu.

You will be taken to the Expenses Guidance & Home Page/My Employee's Claims summary screen. At the bottom of the screen will be a list of all of the claims made by your direct reports. 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;

- My Assignment No. - if **you** have multiple jobs (assignments) and are a manager for more than one of these assignments, you may only want to view expenses/claims related to a specific assignment (or team for example).
- Employee Name – if you only want to see a specific employee's claims.
- Employee Assignment No. – if you only want to see claims relating to an employee's specific assignment (if they have multiple assignments).
- 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.
- 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.

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' 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 your staff's 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.



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## Security:

When exporting data into Excel it is important to password protect any documents you may save or subsequently send. You should ensure documents are saved in a secure area in line with your School's/Trusts policy.