

# User Guide

Claim

Supervisor Mode



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## 1 APPROVAL SCREEN



Figure 1.1

To perform a claim approval, please follow the steps below or follow as what has shown in Figure 1.1

Claim -> Approval

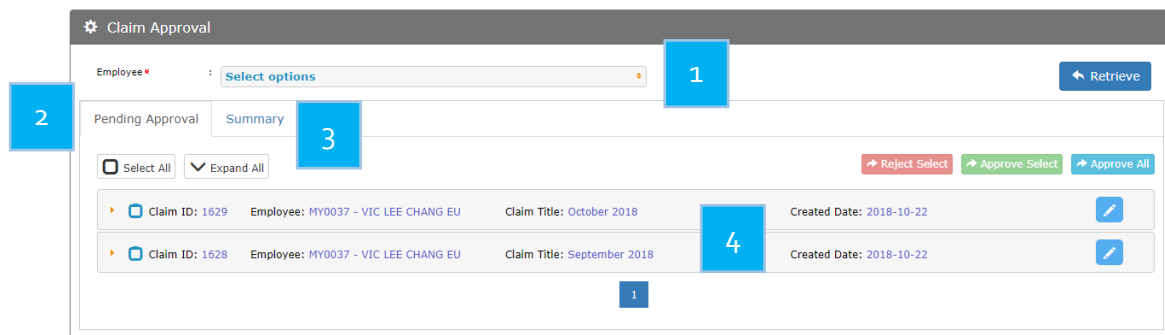


Figure 1.2

- 1 Employee selections
- 2 Pending Approval Tab

- 3 History Tab
- 4 Pending item list

## 2 APPROVAL

### 2.1 Approve or Reject Claim

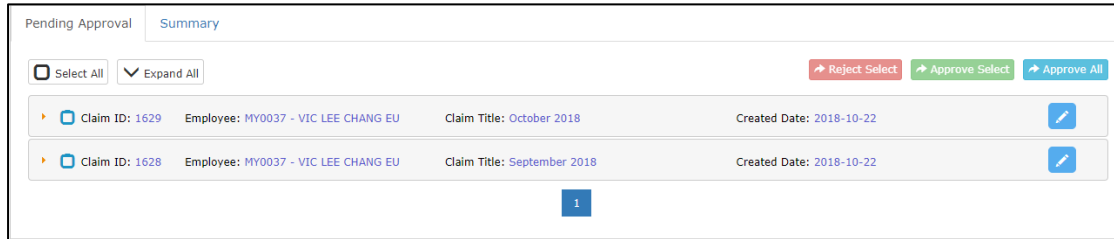


Figure 2.1

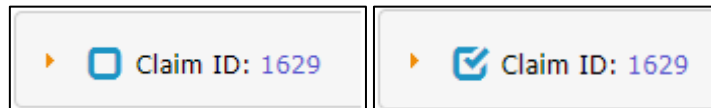


Figure 2.2

Figure 2.3

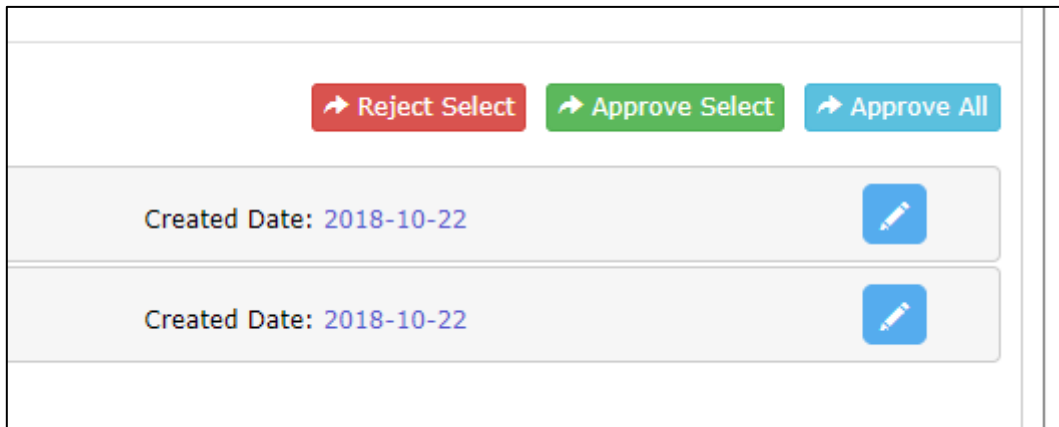


Figure 2.4

Follow the steps to approve a claim:

1. Select whichever item to approve by ticking the ☐ which shown in Figure 2.2 it will become as shown in Figure 2.3
2. Click **Approve Select** as shown in Figure 2.4 to approve the ticked claim(s)
3. (Optional) Supervisor can expand the item to tick only certain items within the claim group to approve

Follow the steps to reject a claim

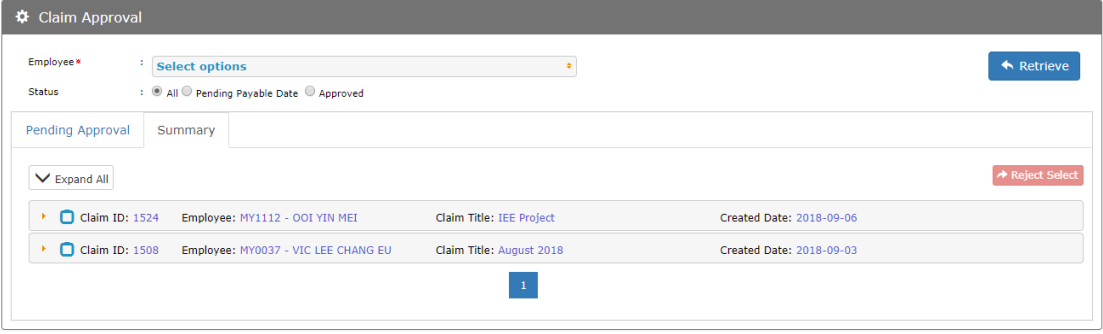
1. Select whichever item to approve by ticking the ☐ which shown in Figure 2.2 it will become as shown in Figure 2.3
2. Click **Reject Select** as shown in Figure 2.4 to approve the ticked claim(s)
3. (Optional) Supervisor can expand the item to tick only certain items within the claim group to reject

Alternatively, supervisor can click **Approve All** as shown in Figure 2.4 to approve all items straight away.

### 3 SUMMARY

#### 3.1 Reject Claim

Claim item(s) that is/are in the summary tab still be able to reject (to be provided the claim(s) has yet to be processed)



The screenshot shows the 'Claim Approval' interface with the 'Summary' tab selected. It includes filters for Employee (a dropdown menu) and Status (radio buttons for All, Pending Payable Date, and Approved). A 'Retrieve' button is in the top right. Below the filters, there are tabs for 'Pending Approval' and 'Summary'. An 'Expand All' button is on the left, and a 'Reject Select' button is on the right. A table lists two claims:

| Claim ID | Employee                  | Claim Title | Created Date |
|----------|---------------------------|-------------|--------------|
| 1524     | MY1112 - OOI YIN MEI      | IEE Project | 2018-09-06   |
| 1508     | MY0037 - VIC LEE CHANG EU | August 2018 | 2018-09-03   |

A pagination button '1' is at the bottom center.

Figure 3.1

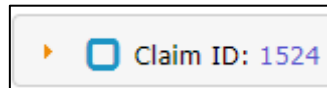


Figure 3.2

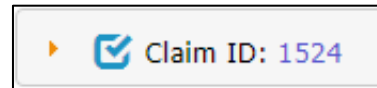



Figure 3.3



A close-up of the bottom right section of the interface. It features a red 'Reject Select' button with a right-pointing arrow. Below it are two rows of claim data, each showing the 'Created Date' in blue text: '2018-09-06' and '2018-09-03'.

Figure 3.4

Follow the steps to reject a claim

1. Select whichever item to approve by ticking the ☐ which shown in Figure 3.2 it will become as shown in Figure 3.3
2. Click **Reject Select** as shown in Figure 3.4 to approve the ticked claim(s)
3. (Optional) Supervisor can expand the item to tick only certain items within the claim group to reject

## 4 REPORT

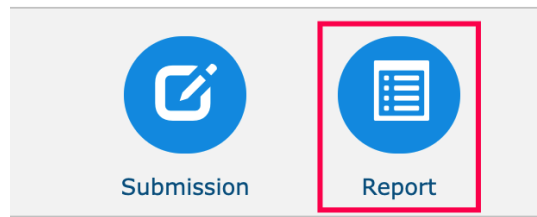


Figure 3.1

To view claim report, please follow the steps below or follow as what has shown in Figure 3.1

Claim -> Report

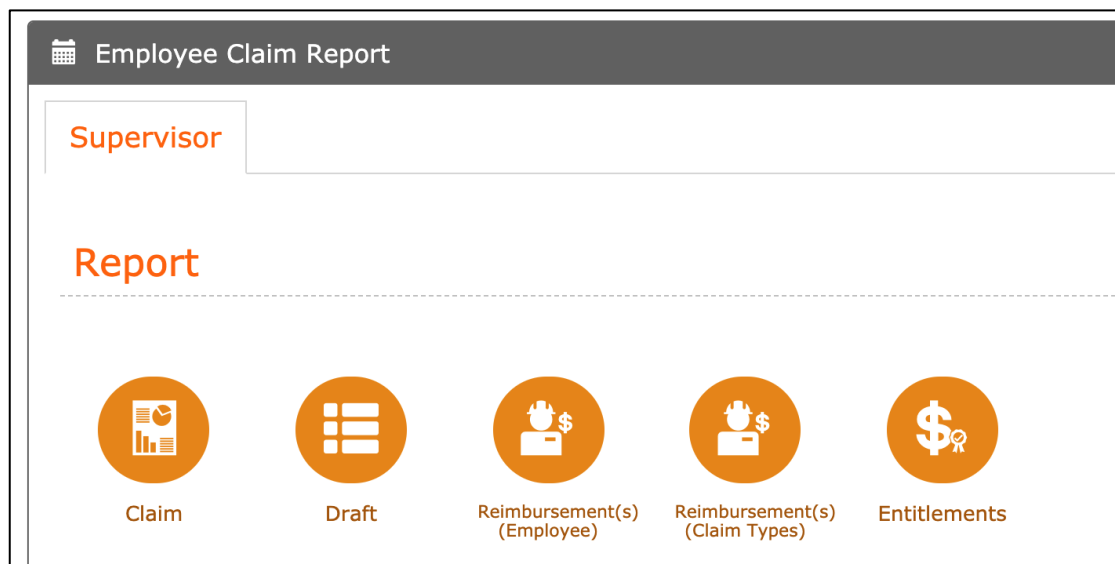


Figure 4.2

Click "Claim Report" as shown in Figure 4.2 then a new window will be popped up to show the report

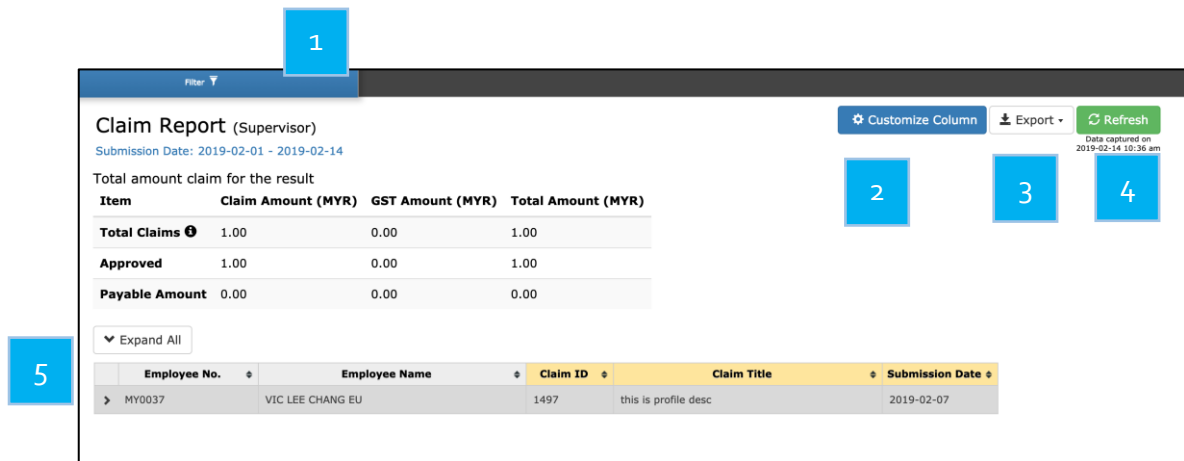


Figure 4.3

- 1 Filter option
- 2 Enable/disable column options
- 3 Export
- 4 Refresh to get latest data
- 5 Report content

**Apply Filter**

Retrieve Clear Filter

Date Type: Submission Date

From: 2019-06-01 To: 2019-06-12

Employment Status: 2 selected

Job Class: Select options

Claim Group: Select options

Claim Type: Select options

Department: Select options

Claim ID: Select options

Cash Advance: Select options

Employee: Select options

Location: Select options

Division: Select options

Sub Department: Select options

Charge Code: Select options

Status: Select options

Claim Amount: From to

Claim Total Amount: From to

Invoice Date From: Invoice Date To:

Approval Date From: Approval Date To:

Payable Date From: Payable Date To:

Figure 4.4

To filter click the “Filter” at the top-left side which shown in Figure 4.3 and filter options will expand out as shown Figure 4.4. After filtration has been made, click **Retrieve** to retrieve the data based on filtration.

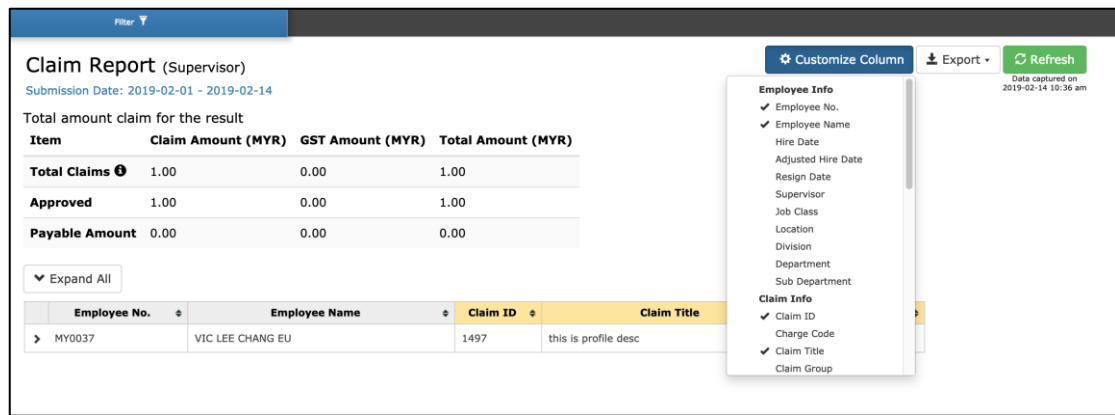


Figure 4.5

To enable/disable the column(s) to show in the report content, click **Customize Column** as shown in Figure 4.5 and a list of column names will be displayed. Enable/disable based on the report you prefer.

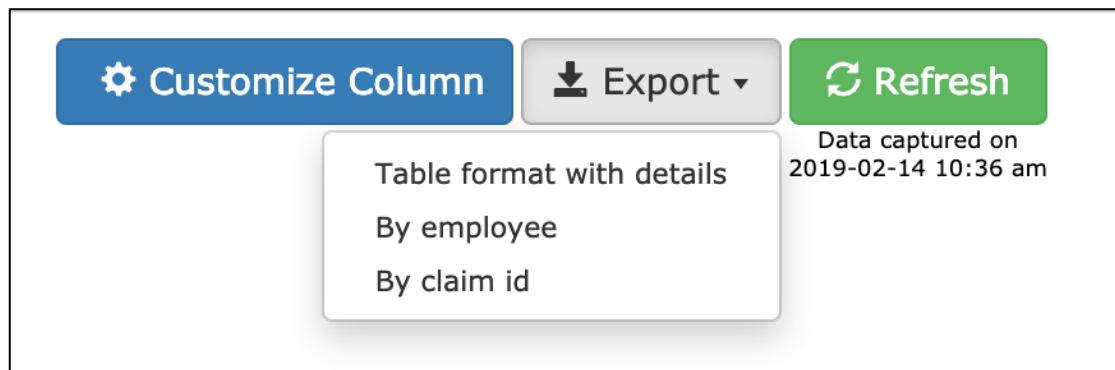


Figure 4.6

To export click the **Export** as shown in Figure 4.6, a list of option will be shown as shown in Figure 4.6 to export out the format of the report that you want.

The exported report will be based on the "Customize Column" options.