

User Guide

Claim

Admin Mode



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1 SUBMISSION SCREEN

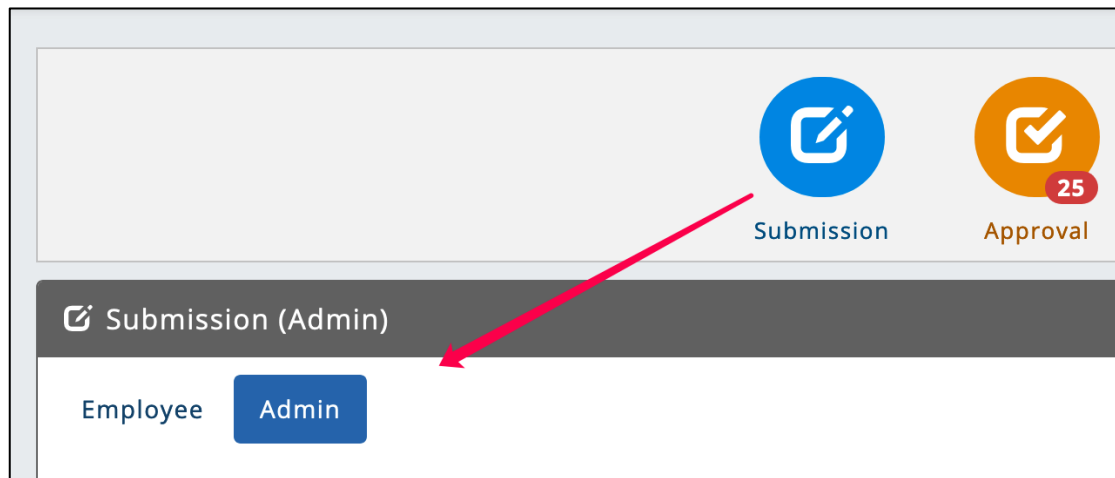


Figure 1.1

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

Claim -> Submission -> Admin

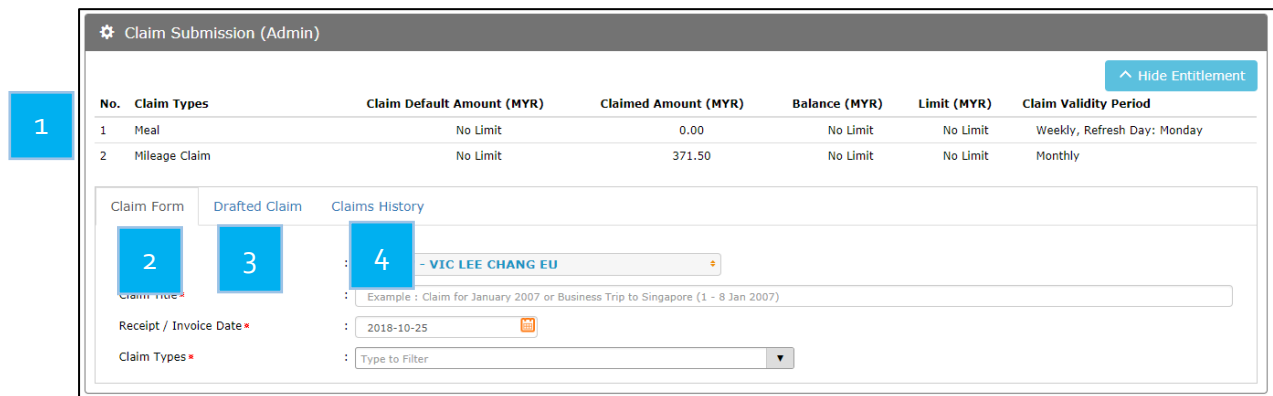


Figure 1.2

- | | |
|---|---|
| <div style="border: 1px solid blue; background-color: #007bff; color: white; padding: 2px; display: inline-block; margin-bottom: 5px;">1</div> Claim entitlement of the selected employee | <div style="border: 1px solid blue; background-color: #007bff; color: white; padding: 2px; display: inline-block; margin-bottom: 5px;">3</div> Drafted Claim, claim(s) yet to submit for approval |
| <div style="border: 1px solid blue; background-color: #007bff; color: white; padding: 2px; display: inline-block; margin-bottom: 5px;">2</div> Claim submission form | <div style="border: 1px solid blue; background-color: #007bff; color: white; padding: 2px; display: inline-block; margin-bottom: 5px;">4</div> Claims history, submitted claims |

2 SUBMIT CLAIM

2.1 Claim Form

2.1.1 Add claim as draft

The screenshot shows the 'Claim Submission (Admin)' interface. At the top, there is a table with columns: No., Claim Types, Claim Default Amount (MYR), Claimed Amount (MYR), Balance (MYR), Limit (MYR), and Claim Validity Period. The table lists two claim types: 'Meal' and 'Mileage Claim'. Below the table, there are tabs for 'Claim Form', 'Drafted Claim', and 'Claims History'. The 'Claim Form' tab is active, showing a form with fields for Employee (MY0037 - VIC LEE CHANG EU), Claim Title (Example: Claim for January 2007 or Business Trip to Singapore (1 - 8 Jan 2007)), Receipt / Invoice Date (2018-10-25), and Claim Types (Type to Filter). A '+ Add to list' button is visible in the top right corner of the form area.

No.	Claim Types	Claim Default Amount (MYR)	Claimed Amount (MYR)	Balance (MYR)	Limit (MYR)	Claim Validity Period
1	Meal	No Limit	0.00	No Limit	No Limit	Weekly, Refresh Day: Monday
2	Mileage Claim	No Limit	371.50	No Limit	No Limit	Monthly

Figure 2.1

Follow the steps to submit a claim:

- As the claim mode is admin mode, therefore admin required to select employee from the "Employee" dropdown.
- After admin has selected employee, key in the claim title for the claim form
- Select a receipt/ invoice date
- Select claim from "Claim Types"

The screenshot shows the 'Claim Form' interface. It includes fields for Employee (MY0037 - VIC LEE CHANG EU), Claim Title (Example: Claim for January 2007 or Business Trip to Singapore (1 - 8 Jan 2007)), Receipt / Invoice Date (2018-10-25), Claim Types (Meal), Convert currency from (FROM: Malaysian Ringgit (MYR), TO: Malaysian Ringgit (MYR)), Rate (0), Claim Amount (Balance: No Limit), Description, Receipt / Invoice Number, Vendor Name, and Attachment (with a 'Browse...' button). A '+ Add to list' button is visible in the top right corner. A note at the bottom states: 'Maximum file size per attachment is 3MB. Only .jpeg, .png, .gif & .pdf formats are allowed.'

Figure 2.2

As different claim types has a different settings and different fields to key in.

Fill up the compulsory field(s) which has the * indicator and click [+ Add to list](#), the claim will be added into a group at the same time the data will be saved into the system.

Claim Submission (Admin)

Hide Entitlement

No.	Claim Types	Claim Default Amount (MYR)	Claimed Amount (MYR)	Balance (MYR)	Limit (MYR)	Claim Validity Period
1	Meal	No Limit	0.00	No Limit	No Limit	Weekly, Refresh Day: Monday
2	Mileage Claim	No Limit	371.50	No Limit	No Limit	Monthly

Claim Form
Drafted Claim
Claims History

New

Submit

Employee * : MY0037 - VIC LEE CHANG EU

Claim Title * : October 2017 Claim

Receipt / Invoice Date * : 2018-10-25

Claim Types * : Type to Filter

Add to list :

Meal
Receipt / Invoice Date: 2018-10-25
Claim Amount (MYR): 29.00

Total Item: 1
Total Claim Amount (MYR): 29.00

Figure 2.3

To view click the item below “Add to list” to expand the to view the details as shown in Figure 2.4

Add to list :

Meal
Receipt / Invoice Date: 2018-10-25
Claim Amount (MYR): 29.00

Description : Lunch in KLIA2 McDonalds

Receipt / Invoice Number : -

Vendor Name : -

Total Item: 1
Total Claim Amount (MYR): 29.00

Figure 2.4

2.1.2 Add item in drafted claim

To add more things into the group, select claim type and follow back what have been done previously as shown in Figure 2.5

Claim Form
Drafted Claim
Claims History

New Claim Form

+ New Item

Submit

Employee * : MY0037 - VIC LEE CHANG EU

Claim Title * : October 2018

Add to list :

Meal
Receipt / Invoice Date: 2018-10-26
Claim Amount (MYR): 29.00

Total Item: 1
Total Claim Amount (MYR): 29.00

Figure 2.5

Claim Form Drafted Claim Claims History

[New Claim Form](#) [Add to list](#) [Submit](#)

Employee * : MY0037 - VIC LEE CHANG EU

Claim Title * : October 2018

Receipt / Invoice Date * : 2018-10-16

Claim Types * : Meal

Convert currency from * : FROM : Malaysian Ringgit (MYR) TO : Malaysian Ringgit (MYR)

Rate * : 0

Claim Amount * : (Balance: No Limit)

Description * :

Receipt / Invoice Number :

Vendor Name :

Attachment * : [Browse...](#)

Maximum file size per attachment is 3MB. Only .jpeg, .png, .gif & .pdf formats are allowed.

Figure 2.6

Claim Form Drafted Claim Claims History

[New Claim Form](#) [New Item](#) [Submit](#)

Employee * : MY0037 - VIC LEE CHANG EU

Claim Title * : October 2018

Add to list :

Meal	Receipt / Invoice Date: 2018-10-26	Claim Amount (MYR): 29.00	Add Edit Delete
------	------------------------------------	---------------------------	---

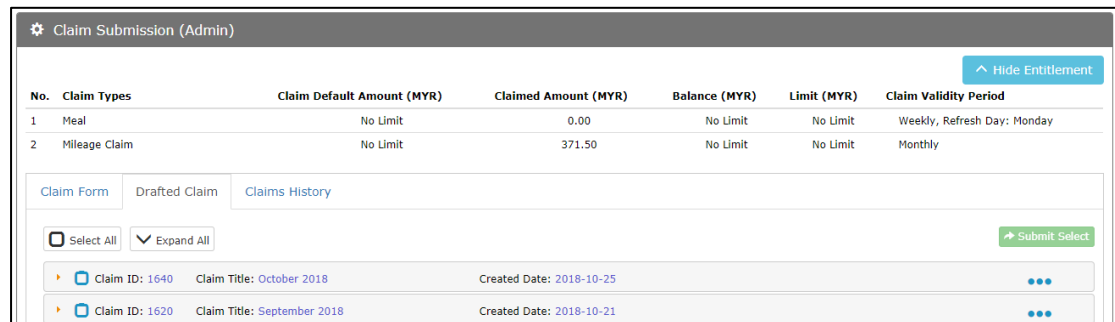
Total Item: 1 Total Claim Amount (MYR): 29.00

Figure 2.7

After everything has been finalized, click [Submit](#) as shown in Figure 2.7 to submit the claim to respective party based on the claim(s) setting(s).

2.2 Drafted Claim

2.2.1 Submit Drafted Claim



The screenshot shows the 'Claim Submission (Admin)' interface. At the top, there's a header with a gear icon and the text 'Claim Submission (Admin)'. Below it is a table with columns: No., Claim Types, Claim Default Amount (MYR), Claimed Amount (MYR), Balance (MYR), Limit (MYR), and Claim Validity Period. The table has two rows: 1. Meal, No Limit, 0.00, No Limit, No Limit, Weekly, Refresh Day: Monday; 2. Mileage Claim, No Limit, 371.50, No Limit, No Limit, Monthly. Below the table, there are tabs: Claim Form, Drafted Claim (selected), and Claims History. There are also buttons: Select All, Expand All, and Submit Select. Below these are two claim items: Claim ID: 1640, Claim Title: October 2018, Created Date: 2018-10-25; and Claim ID: 1620, Claim Title: September 2018, Created Date: 2018-10-21. Each item has a three-dot menu icon.

No.	Claim Types	Claim Default Amount (MYR)	Claimed Amount (MYR)	Balance (MYR)	Limit (MYR)	Claim Validity Period
1	Meal	No Limit	0.00	No Limit	No Limit	Weekly, Refresh Day: Monday
2	Mileage Claim	No Limit	371.50	No Limit	No Limit	Monthly

Claim Form | Drafted Claim | Claims History

Select All | Expand All | Submit Select

Claim ID: 1640 | Claim Title: October 2018 | Created Date: 2018-10-25

Claim ID: 1620 | Claim Title: September 2018 | Created Date: 2018-10-21

Figure 2.8

To submit claim(s), tick the checkbox on the left hand side as shown in Figure 2.8 and Click **Submit Select** to submit selected claim(s)

2.2.2 Edit Drafted Claim

To edit, simply mouse over the **...** which shown in Figure 2.9 and click the "Click to Edit" to edit the claim item you wish to edit.

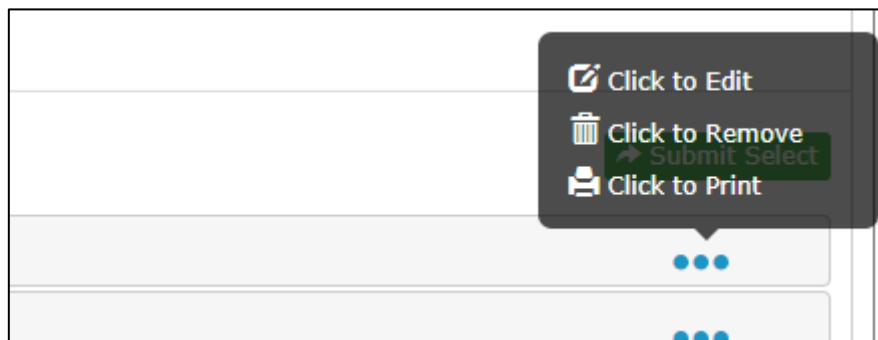
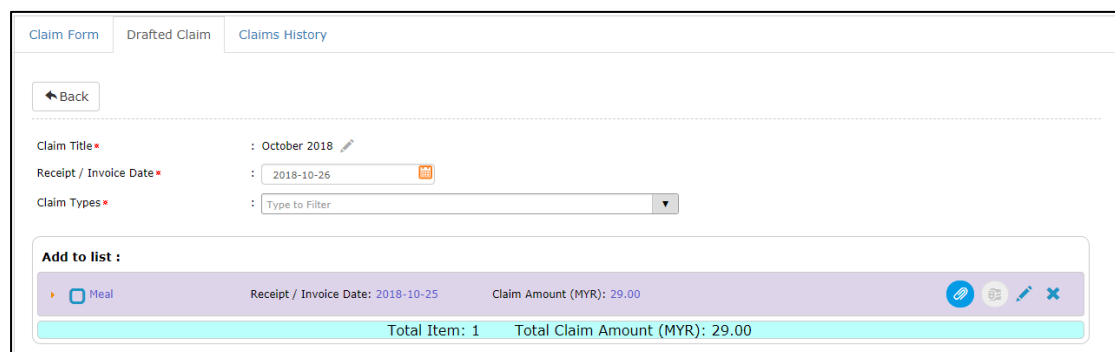


Figure 2.9

2.2.3 Add item in drafted claim



The screenshot shows the 'Drafted Claim' form. It has a header with tabs: Claim Form, Drafted Claim (selected), and Claims History. Below the tabs is a 'Back' button. The form has three main sections: Claim Title (with a dropdown menu showing 'October 2018'), Receipt / Invoice Date (with a date picker showing '2018-10-26'), and Claim Types (with a dropdown menu showing 'Type to Filter'). Below these is an 'Add to list' section. It contains a table with one row: Meal, Receipt / Invoice Date: 2018-10-25, Claim Amount (MYR): 29.00. At the bottom, there is a summary bar: Total Item: 1, Total Claim Amount (MYR): 29.00.

Claim Form | Drafted Claim | Claims History

Back

Claim Title : October 2018

Receipt / Invoice Date : 2018-10-26

Claim Types : Type to Filter

Add to list :


	Receipt / Invoice Date	Claim Amount (MYR)
Meal	2018-10-25	29.00

Total Item: 1 Total Claim Amount (MYR): 29.00


Figure 2.10

To add more things into the group, select claim type and follow back what have been done previously as shown in 2.1.2 Add item in drafted claim, the same concept applicable here as shown in Figure 2.10

2.2.4 Delete drafted claim

To delete, simply mouse over the  which shown in Figure 2.9 and click the "Click to Remove" to delete the claim item you wish to delete.

2.2.5 Print claim

To print, simply mouse over the  which shown in Figure 2.9 and click the "Click to Print" to print the claim. A window will be popped up as shown in Figure 2.11



MYwave Release Testing Company 2
Claim Form

Claim ID : 109 Submission Date : 2019-10-17
Claim Title : Claim
Claim Form Status : 1 Approved | 1 Approved & Pending Payable
Charge Code : 604 Department/Division : Management
Employee No. : RMY0674 Employee Name : Employee Name
Supervisor Name : Supervisor Name Supervisor E-mail : supervisor@email.com

No.	Item	Remarks	Status	Receipt / Invoice Date	Total Amount (MYR)
1	Computer Hardware	1	Approved & Pending Payable	2019-10-11	1.00
Total Amount (MYR)					1.00

Item Summary

Item	Total Amount (MYR)
Computer Hardware	1.00

	REQUESTOR	APPROVAL	
		Manager / Director / VIP	MD / VP GM
Name	Requestor Name		
SIGNATURE			
Date	2019-11-29		

PROCESSED BY FINANCE	ACKNOWLEDGEMENT OF RECEIPT	SIGNATURE / CO.CHOP
FIN DIR / MGR / ACCOUNTANT	Name : E/N OR I/C :	

Figure 2.11

2.3 Claim History

Claim Form	Drafted Claim	Claims History	
Expand All ⓘ			
Claim ID: 150	Title: Hotel	Created Date: 2019-01-25	Status: 0 A 0 R 0 C 1 P 0 I 0 PP
Claim ID: 149	Title: Hotel Claim	Created Date: 2019-01-25	Status: 1 A 0 R 0 C 0 P 0 I 0 PP

Figure 2.12

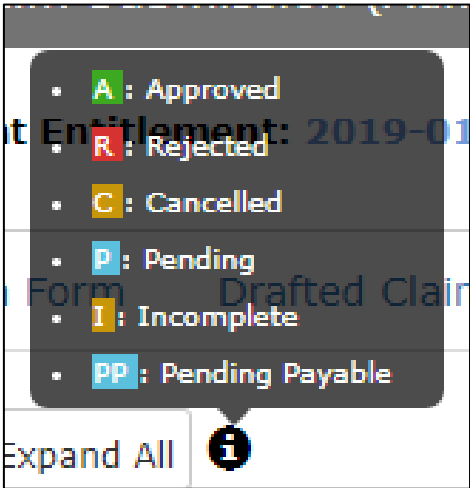


Figure 2.13

Status: 0 A 0 R 0 C 1 P 0 I 0 PP
--

Figure 2.14

A: Approved

R: Rejected

C: Cancelled

P: Pending

I: Incomplete

PP: Pending Payable

In claim history, admin able to view the previously submitted claim(s) is under which status, can print, cancel (if still pending) and claim(s) that was/were marked as “Incomplete” claim(s).

2.3.1 Submit Incomplete Claim

No.	Claim Types	Claim Default Amount (MYR)	Claimed Amount (MYR)	Balance (MYR)	Limit (MYR)	Claim Validity Period
1	Meal	No Limit	0.00	No Limit	No Limit	Weekly, Refresh Day: Monday
2	Mileage Claim	No Limit	371.50	No Limit	No Limit	Monthly

Claim Form | Drafted Claim | Claims History

☐ Select All ☐ Expand All [Submit Select](#)

Claim ID: 1640	Claim Title: October 2018	Created Date: 2018-10-25	...
Claim ID: 1620	Claim Title: September 2018	Created Date: 2018-10-21	...

Figure 2.15

To submit claim(s), tick the checkbox on the left-hand side as shown in Figure 2.14 and Click [Submit Select](#) to submit selected claim(s)

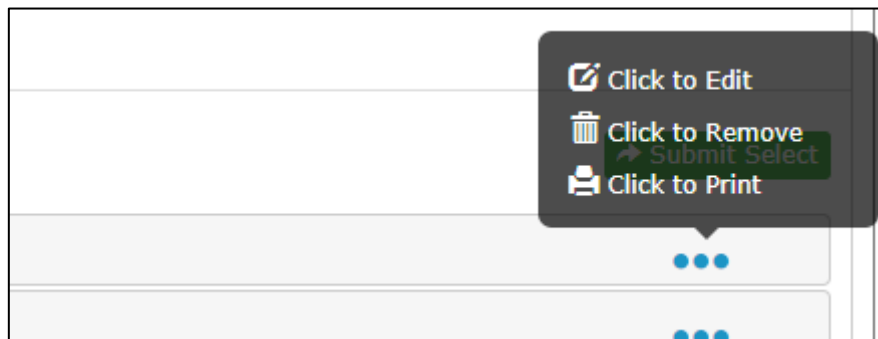


Figure 2.16

2.3.2 Edit Incomplete Claim

To edit, simply mouse over the ... which shown in Figure 2.13 and click the "Click to Edit" to edit the claim item you wish to edit.

2.3.3 Delete drafted claim

To delete, simply mouse over the ... which shown in Figure 2.15 and click the "Click to Remove" to delete the claim item you wish to delete.

2.3.4 Print claim

To print, simply mouse over the ... which shown in Figure 2.15 and click the "Click to Print" to print the claim. A window will be popped up as shown in Figure 2.11

3 REPORT

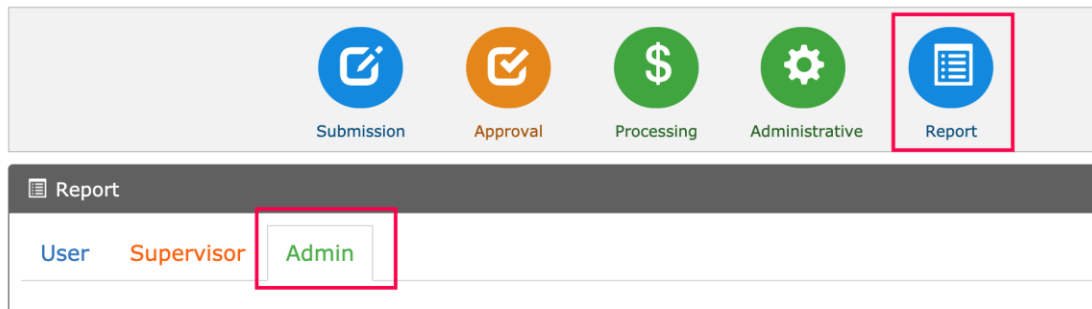


Figure 3.1

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

Report -> Admin

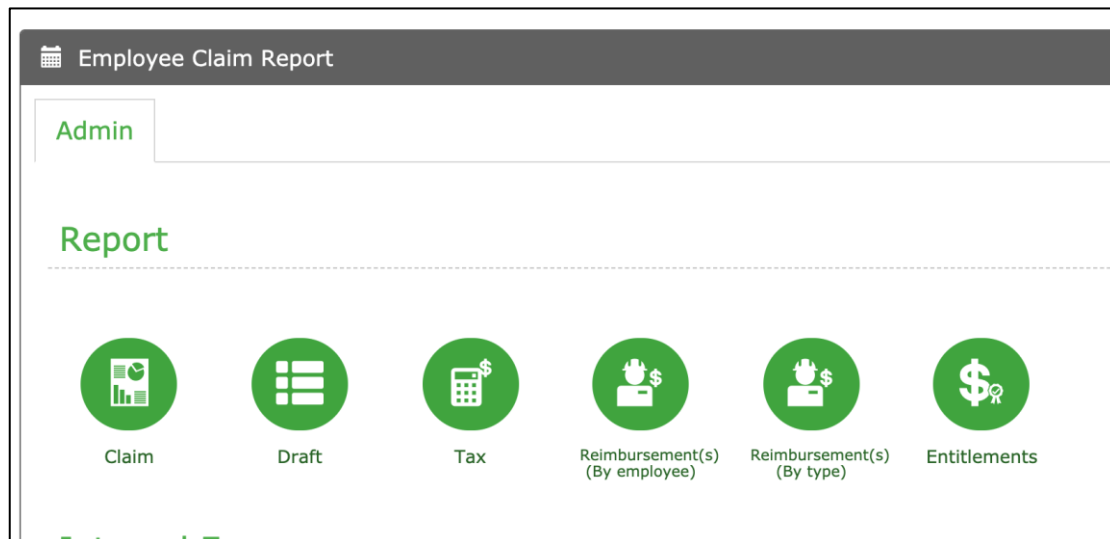


Figure 3.2

Click "Claim" to show the transactional information as shown in Figure 3.2 then a new window will be popped up to show the report

Click "Draft" to show the drafted claim(s) that include all claims that employee(s) drafted as shown in Figure 3.2 then a new window will be popped up to show the report

Click "Tax" to show the taxed claim(s) such as GST as shown in Figure 3.2 then a new window will be popped up to show the report

Click "Total Claim (Employee)" to show the total claim amount by each employee as shown in Figure 3.2 then a new window will be popped up to show the report

Click "Total Claim (Claim Types)" to show the total claim amount by each claim type as shown in Figure 3.2 then a new window will be popped up to show the report

Click "Entitlement" to show the entitlement claim(s) that include all claims that employee(s) entitled as shown in Figure 3.2 then a new window will be popped up to show the report

3.1 Report Navigation

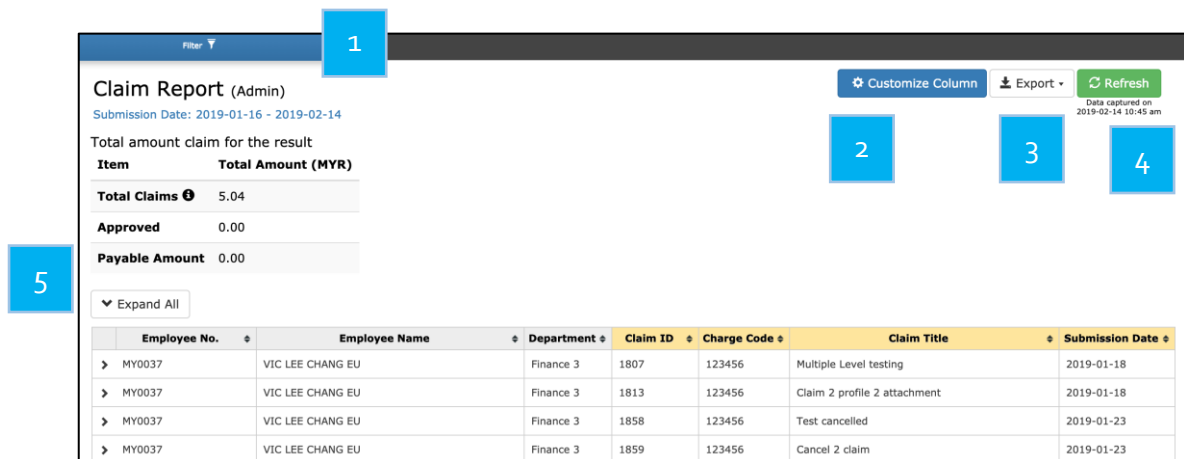
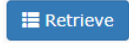


Figure 3.3

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

The 'Apply Filter' dialog box is shown, allowing users to filter data based on various criteria. It includes sections for Date Type (Submission Date), Employment Status (2 selected), Supervisor, Location, Claim Type, Department, Claim ID, Cash Advance, Claim Amount, Claim Total Amount, Invoice Date, Approval Date, and Payable Date. Each section has a 'Select options' button or input field. At the top right, there are 'Retrieve' and 'Clear Filter' buttons.

Figure 3.4

To filter click the "Filter" at the top-left side which shown in Figure 3.3 and filter options will expand out as shown Figure 3.4. After filtration has been made, click  to retrieve the data based on filtration.

Filter ▼

Claim Report (Admin)

Submission Date: 2019-01-16 - 2019-02-14

Total amount claim for the result

Item	Total Amount (MYR)
Total Claims ①	5.04
Approved	0.00
Payable Amount	0.00

▼ Expand All

Employee No. ⚡	Employee Name ⚡	Department ⚡	Claim ID ⚡	Charge Code ⚡	Submission Date ⚡
▶ MY0037	VIC LEE CHANG EU	Finance 3	1807	123456	2019-01-18
▶ MY0037	VIC LEE CHANG EU	Finance 3	1813	123456	2019-01-18
▶ MY0037	VIC LEE CHANG EU	Finance 3	1858	123456	2019-01-23

Customize Column

Export ▼

Refresh

Data captured on 2019-02-14 10:45 am

Employee Info

☒ Employee No.
☒ Employee Name
☐ Hire Date
☐ Adjusted Hire Date
☐ Resign Date
☐ Supervisor
☐ Job Class
☐ Location
☐ Division
☒ Department
☐ Sub Department

Claim Info

☒ Claim ID
☒ Charge Code
☒ Claim Title
☐ Claim Group

Figure 3.5

To enable/disable the column(s) to show in the report content, click [Customize Column](#) as shown in Figure 3.5 and a list of column names will be displayed. Enable/disable based on the report you prefer.

Customize Column

Export ▼

Refresh

Data captured on 2019-02-14 10:45 am

Table format with details

By employee

By claim id

Figure 3.6

To export click the [Export ▼](#) as shown in Figure 3.6, a list of option will be shown as shown in Figure 3.6 to export out the format of the report that you want.


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

	Employee No. ⚡	Employee Name ⚡	Supervisor ⚡	Location ⚡	Division ⚡
▶	JN001	CLAYTON HERNANDEZ DIAZ	JOSEF TIOU HONG		R&D
▶	JN001	CLAYTON HERNANDEZ DIAZ	JOSEF TIOU HONG		R&D
▶	JN056	CLAYTON HERNANDEZ DIAZ	CLAYTON HERNANDEZ DIAZ		
▶	JN056	CLAYTON HERNANDEZ DIAZ	CLAYTON HERNANDEZ DIAZ		
▶	JN056	CLAYTON HERNANDEZ DIAZ	CLAYTON HERNANDEZ DIAZ		
▶	JN056	CLAYTON HERNANDEZ DIAZ	CLAYTON HERNANDEZ DIAZ		
▶	JN056	CLAYTON HERNANDEZ DIAZ	CLAYTON HERNANDEZ DIAZ		
▶	JN056	CLAYTON HERNANDEZ DIAZ	CLAYTON HERNANDEZ DIAZ		

Figure 3.7

Employee No. ⚙		Employee Name ⚙		Supervisor ⚙		Location ⚙	Division ⚙	Department ⚙	Sub Department ⚙
JN001		SANTHA DEVIKUMAR SRI		SANTHA DEVIKUMAR SRI			R&D		
No	Claim Types	Description / Purpose	Participant	Currency	Claim Total Amount	Receipt / Invoice Number	Invoice Date	Status	Approval Status
1	Petrol	100	-	MYR	100.00	-	2019-04-24	Pending Approval	1. Pending
2	Toll	100	-	MYR	300.00 (AUD 100.00)	-	2019-04-24	Pending Approval	1. Pending
Grand Total (MYR)									
Total Claim Amount		400.00							
Total Approved Amount		0.00							
Total Payable Amount		0.00							

Figure 3.8

To view more detail of the claim, click the  as shown in Figure 3.7. The detail of the claim will show below the row as shown in Figure 3.8