



HOW TO GUIDE

Setting up the Office Expenses Dashboard

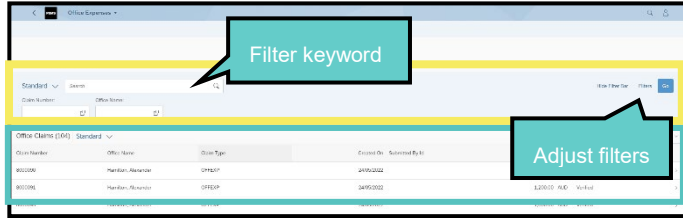
This guide explains how to set-up the office expenses dashboard in order to manage office claims. The dashboard columns can be tailored, and filters applied, to present the information you require most. These variations can be saved and shared with others, in addition to setting your favourite view as a default for future use.

1. Open the **Office Expenses** tile from the PEMS dashboard.



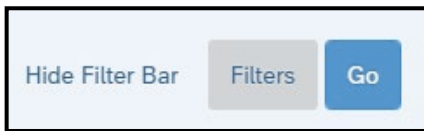
2. Upon opening the **Office Expenses** tile in PEMS, you will note two distinct sections where the view settings can be changed.

- The top section (in yellow) can be set to determine the filters for conducting searches.
- The lower section (in blue) can be set to determine the preferable columns that will present on your office expenses dashboard.

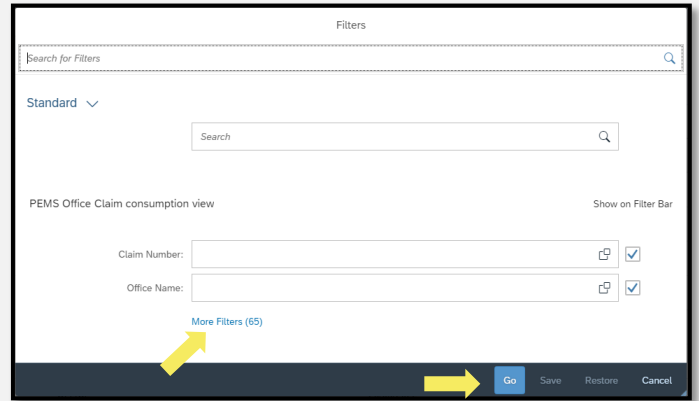


Adjust Filters

3. Select the **Filters** link (top right of the page).



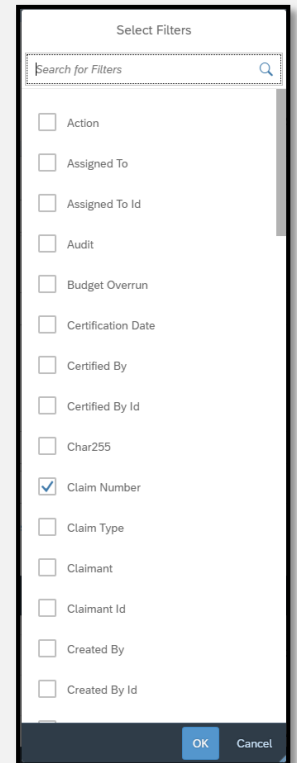
4. The Filters dialog box displays. Where applicable, you can see any current applied filters and their values here.



5. To add new filters, select **More Filters**.

6. Select the desired filter checkboxes and click **OK** when done.
 - Alternatively, you can un-check pre-selected filters and Select **Go**. The dashboard will present the filters you have adjusted.

Note: the **Save** option within the Filters dialog box will update the view that is currently applied e.g. in this case **Standard** (default view).



For further information or support:

MaPS

Non-travel related work expenses and HR services and advice.



IPEA

Travel related advice, travel claim or reporting enquiries relating to parliamentarians and their employees.





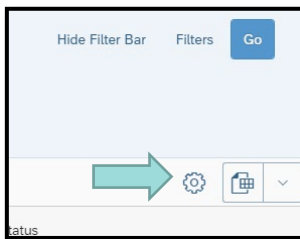
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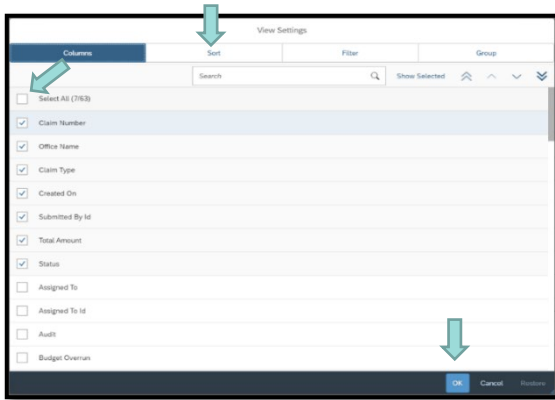
Customising how your dashboard columns are displayed

Where additional information is required, you can customise the columns in your dashboard. This allows you to add and remove columns, change the sort order or group by a selected field.

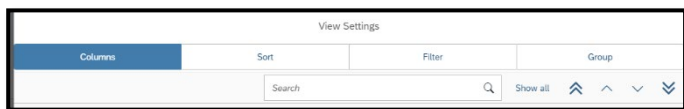
1. Select the **Setting** icon (Cog), located at the top-right corner of your screen.



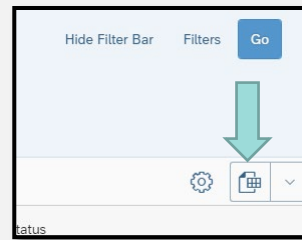
2. The **View Settings** screen displays. By default it shows the columns selection list. The columns currently displayed are ticked.



3. To show or hide the columns, tick or un-tick the checkboxes. Select **OK**.
4. To re-order selected columns on your dashboard, select the 'Up' or 'Down' arrows.

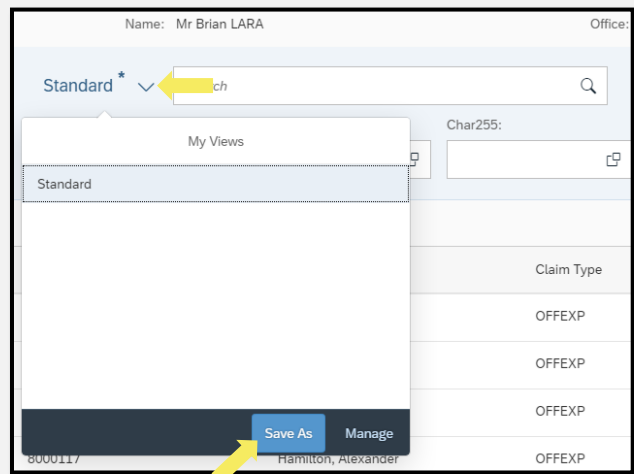


5. Back in the dashboard, you can save the column view you have created by following the steps from the **'Save Views'** section below.
6. To export dashboard extract data to a spreadsheet, select the **'Export to Spreadsheet'** icon, at the top-right corner of your screen.



Save Views

Anytime changes are made in the filter or column sections, you will notice an asterisk (*) next to the view name. This means that the changes are unsaved.



Changes can be saved in a few ways:

1. After selecting your desired filter and/or column choices (step 6), click on the drop-down arrow next to the view name and select **Save As**.
2. In the 'View' box, enter the desired name for the filter created.

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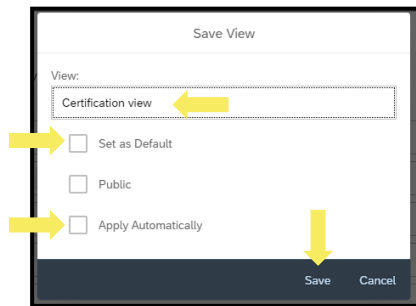




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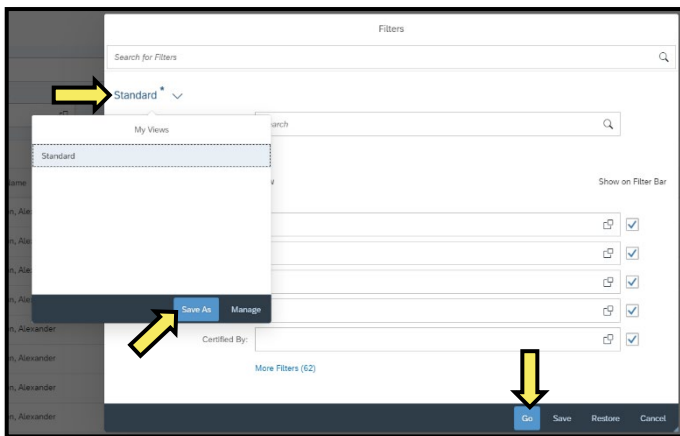
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3. Tick the relevant boxes if you would like the view to apply automatically and/or be your default view. Select **Save**.



Alternatively, if you are back at the Dashboard:

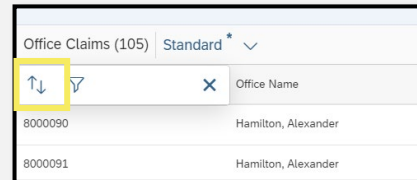
1. Select the drop-down next to the view name. This will open a drop-down called *My Views*. Select **Save As**.
2. In the 'View' box, enter the desired name for the filter created.
3. Tick the relevant boxes if you would like the view to apply automatically and/or be your default view. Select **Save** and then **Go**.



Sorting claims list order

The default settings present oldest claims at the top.

To view newest claims first, click on the column name e.g. *Claim Number* or *Created On* to open the options to sort or filter. This will enable you to reverse the display order.



Searching content

The asterisk (*) character can be used in the dashboard search bar. Adding * will search for any possible characters in place of the asterisk. This is useful when searching claims via vendor. Type in an asterisk either side of a key search term to display all claims with that term in their name.



E.g. *Australia Post* could be found using **Australia** in the Vendor Name search field.

Tip: Useful columns may include: Vendor Name, Status and Assigned To. For more examples refer to the **Dashboard display suggestions** section (last page).

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Dashboard display suggestions

Examples for useful columns in filtered dashboard:

[New Name] **dashboard** – for example, *'Optimal View'* or *'My view'* & etc.

- Created On
- Claim Number
- Invoice Number
- Vendor Name
- Status
- Assigned To
- Gross Amount
- Net Amount

[New Name] **dashboard** - for example, *'Returned'* or *'Return Reason'* & etc.

- Claim Number
- Created On
- Created By
- Vendor Name
- Net Amount*
- Total Amount
- Status**
- Return Reason
- Return date
- Created By

*Excluded GST amounts come off the budget

**filter set to *'Returned'*

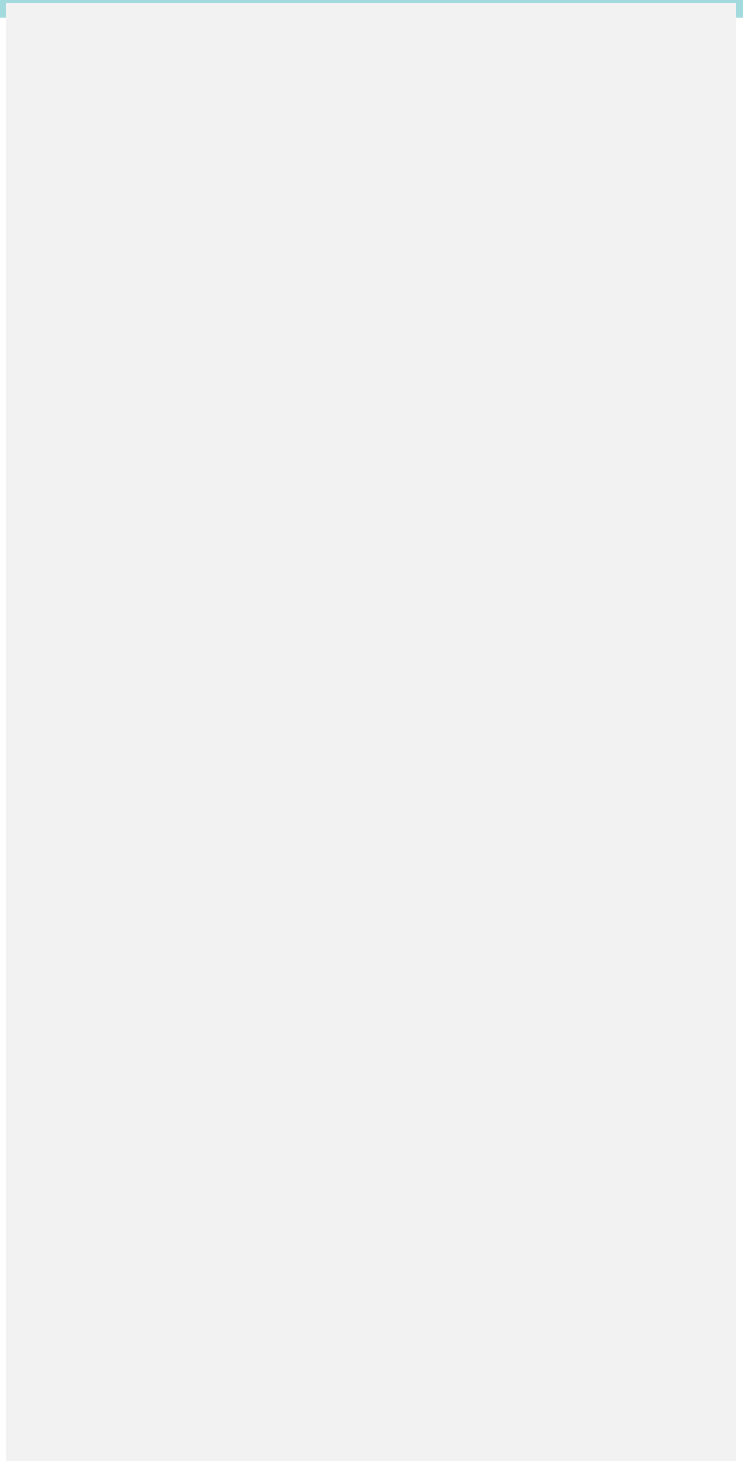
For Parliamentarians

[New Name] **dashboard** – for example, *'To be Certified'*

- Claim Number
- Expense Type
- Created On
- Assign To*
- Vendor Name
- Created By
- Status**
- Net Amount
- Total Amount

*filter set to *'Surname'*

**filter set to *'Draft'*



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