Proxy expense claim enquiry:

This enquiry will show all expense claims submitted by the Staff members you have proxy access to submit expense claims for, (please note this is not restricted to only the claims you have entered, if you have access to enter claims on behalf of 4 different members of staff this report will show all the claims of those 4 members of staff regardless of who submitted the claim originally)

Reports > Global Reports > Expenses > Proxy expense claim enquiry

You can either click on Search to retrieve all claims or restrict to a single member of staff by either resource ID or name.

If you wish to see payment dates for finished claims go to:

Reports > Global Reports > Expenses > Expenses payment date enquiry

(Claims showing as in workflow or in draft will not have any payment dates yet)

Enter the transaction number and click on Search.
To see receipts that have been added to claims:

Common > Document archive > Document archive enquiry

Enter the transaction number under Index 2 and click on Load

Top tip!

To prevent you having to go to different places on the menu for these different screens, the first time you use both the payment enquiry and the document archive enquiry click ‘Add to Shortcuts’ in the toolbar.

Doing this next time you go to the Proxy expense claim enquiry screen the payments enquiry and documents enquiry will be readily available from ‘Your shortcuts’ in the toolbar: