

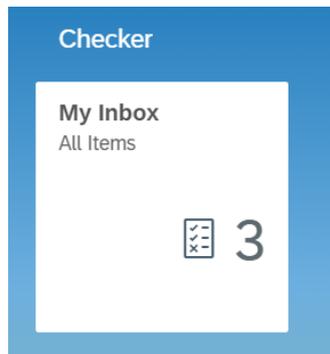


## My Inbox – Checker Only

**Note:-**

- A Checker is set up on behalf of a Manager to review Travel Claims and Travel Privilege Documentation
- A Checker reviews the Travel Claims and Travel Privilege documents and if all information submitted is correct then the item is sent to Manager for approval (Validated), for travel claims/documents which required updating they are sent back to the Employee.(Change Required)

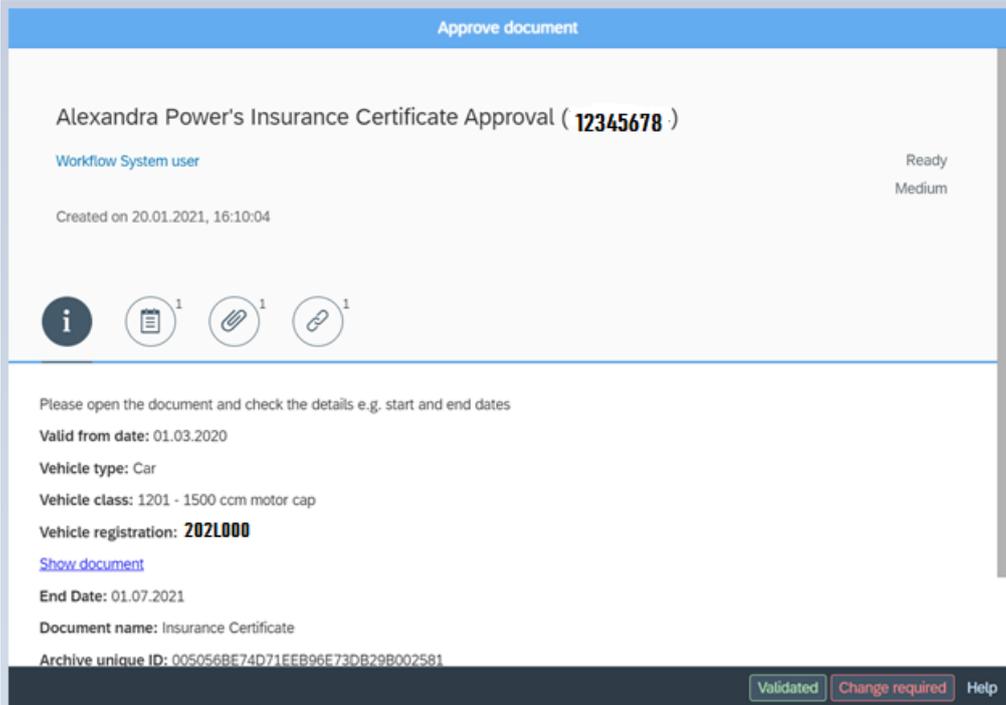
1. Logon with your user id which is your personnel number preceded by C
2. Click the “My Inbox” tile



**Note:** -Click on the filter icon – on the left hand side of the Inbox at the bottom.  Select Approve document and click on OK to view/review the Travel Documents or Approve Expenses to view/review the Travel Claims

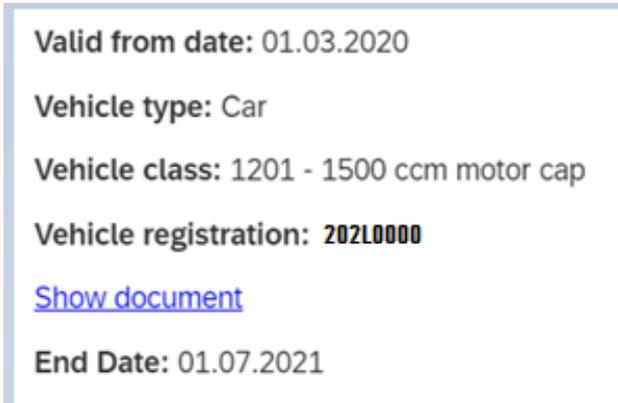


- To review Travel Documents – e.g. Insurance Certificate. Select [Show document](#) to view the document. This opens on the bottom left of your screen.



The screenshot shows a web interface titled "Approve document". The main heading is "Alexandra Power's Insurance Certificate Approval ( 12345678 )". Below this, it indicates the user is "Workflow System user" and the document was "Created on 20.01.2021, 16:10:04". On the right side, the status is "Ready" and the priority is "Medium". There are four circular icons in a row: an information icon (i), a calendar icon with a '1', a paperclip icon with a '1', and another paperclip icon with a '1'. Below the icons, a message says "Please open the document and check the details e.g. start and end dates". The document details listed are: "Valid from date: 01.03.2020", "Vehicle type: Car", "Vehicle class: 1201 - 1500 ccm motor cap", "Vehicle registration: 202L000", and a blue link "Show document". Other details include "End Date: 01.07.2021", "Document name: Insurance Certificate", and "Archive unique ID: 005056BE74D71EEB96E73DB29B002581". At the bottom right, there are three buttons: "Validated" (green), "Change required" (red), and "Help" (grey).

- Ensure that the information listed matches what is on the document. Example below;



The example shows a list of document details to be verified against the actual document. The details are: "Valid from date: 01.03.2020", "Vehicle type: Car", "Vehicle class: 1201 - 1500 ccm motor cap", "Vehicle registration: 202L0000", a blue link "Show document", and "End Date: 01.07.2021".

5. To forward the document to a Manager for approval select the **Validated** button at end of the screen – the following pop up box presents. (Do not enter comment as approval comments are not visible to the Manager.)

**Submit Decision**

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You have selected "Validated".

Add comment (optional)

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Submit    Cancel

6. If updates are required to the information relating to documents select the **Change required** button at end of the screen – the following pop up box presents

**Submit Decision**

---

You have selected "Change required".

Add comment (required)

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Submit    Cancel

***Reason for decision must be populated to inform the employee of the reason for rejection of the attached document/travel claim.***

7. To review Travel Expenses – click on the claim

Approve expense

Kirsty O'Neil

INFORMATION
EXPENSES
COST ASSIGNMENT

Trip Number: 1700202250  
 Total Cost of Trip: **184,80** EUR  
 Amount to be Reimbursed: **184,80** EUR  
 Destination: Ireland, Donegal  
 Start Date: 14.12.2020, 08:00  
 End Date: 14.12.2020, 17:00  
 Reason: Travel for Meetings  
 Note to Approver: Meeting with Snr Management.

**EXPENSES**

Date	Category	Amount	
14.12.2020	Mileage	132,83 EUR	>
14.12.2020	Summary of 10 hr rate	36,97 EUR	>
14.12.2020	Tolls	15,00 EUR	>

Validated
Change required
Help

8. Review the dates and reasons for travel and review each Expense Type by clicking on each line;

### Mileage

 N.B. Accumulated mileage based on paid expenses only - hence the value of this claim could change at payment

Details

Amount: **132,83** EUR  
Expense Date: 14.12.2020  
From/Start Time: Limerick, 07:30  
To/End Time: Donegal, 22:35  
Distance: **350** KM  
Description: Travel by Car for Meetings

[Close](#)

### Summary of 10 hr rate

Details

Amount:  
**36,97** EUR

Expense Date:  
14.12.2020

Description:  
Subs for Meetings

[Close](#)

### Tolls

Details

Amount:  
**15,00** EUR

Expense Date:  
14.12.2020

Description:  
Tolls on M7 and M1

Attachments

[Show document](#)

[Close](#)

**\*Select [Show document](#) to view the receipt attached to an expense type. This opens on the bottom left of your screen.**

9. Continue this process until all Travel Documents/Claims have been reviewed and Validated (Sent to Manager) or sent for a Change Required (Returned to Employee).