

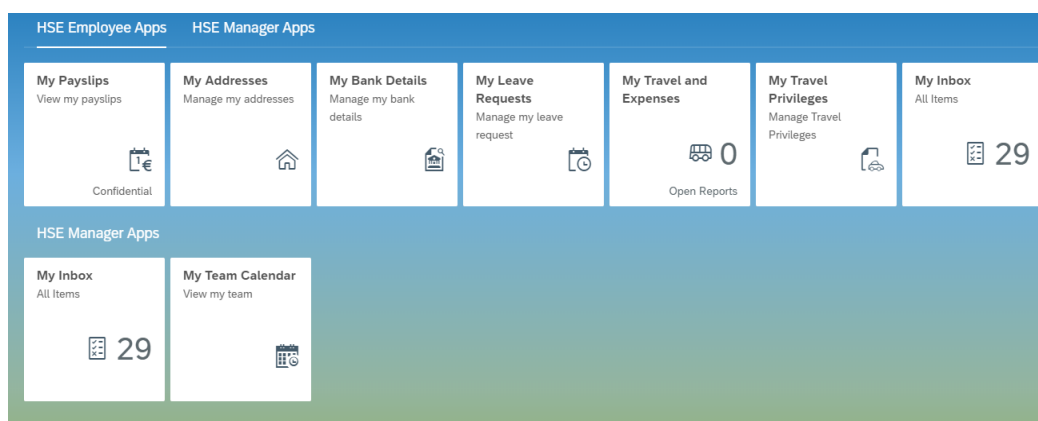



My Inbox – Approving Travel Privileges

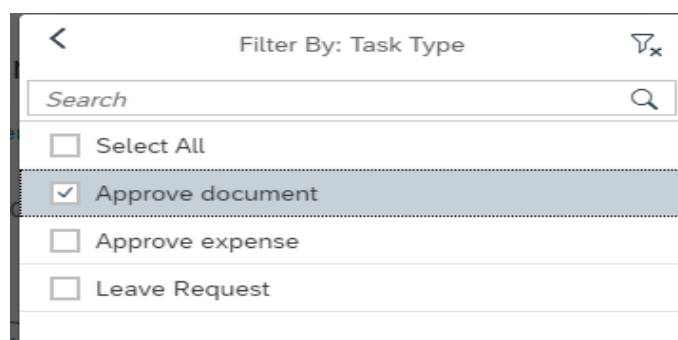
Note:-

- *If an employee wishes to claim Mileage and/or Expenses, it is essential that a Travel Privileges record exists*
- *If an employee changes his/her vehicle during the year, this will necessitate entering new travel privileges record – select a valid from date, attach a new licensing cert, vehicle insurance and indemnity. Include Passenger Indemnity where necessary – This document must be approved by a Manager.*
- *For an employee who claims expenses only they are required to submit an Employee Declaration for approval.*
- *If an employees’ car does not change, they are required to submit updated vehicle insurance, indemnity, employee declaration (passenger indemnity if required) as these documents expire.*

1. Logon as MXXXXXXXX
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 the Travel Documents.



3. Select the document for approval. For Example, Approve Vehicle licensing Certificate. Select [Show document](#) to view the document. This opens on the bottom left of your screen.

The screenshot shows a web application interface. On the left is a sidebar with a search bar and a list of documents filtered by 'Creation Date (Today)'. The selected document is 'Approve Vehicle Licensing Certificate of Eimear Regan', which is a 'Workflow System' with a 'Medium' priority. The main content area displays the document details: 'Approve Vehicle Licensing Certificate of Eimear Regan', 'Workflow System', 'Ready', 'Medium', and 'Created on 25.09.2019, 10:08:30'. Below this are icons for information, checklist, attachments, and comments. A message reads: 'Please open the document and check the details e.g. start and end dates'. The document details are: 'Valid from date: 01.10.2019', 'Vehicle type: Car', 'Vehicle class: 1501and above motor cap.', 'Vehicle registration: 192SO192', 'End Date: 31.12.9999', 'Document name: Vehicle Licensing Certificate', 'Archive unique ID: 005056AB89901ED9B7EE7ACB9DE75B09', and 'Document filename: Chrysanthemum.jpg'. At the bottom right are buttons for 'Approve', 'Reject', 'Show Log', and 'Claim'.

4. Ensure that the information listed matches what is on the document.

Valid from date: 01.10.2019

Vehicle type: Car

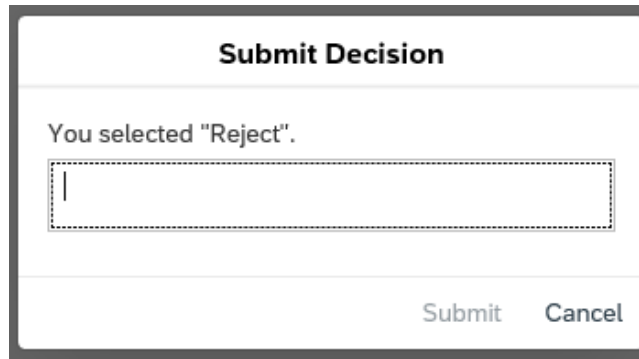
Vehicle class: 1501and above motor cap.

Vehicle registration: 192SO192

5. To Approve the travel document select the **Approve** button at end of screen – the following pop up box presents. Do not enter comment as approval comments are not visible to the employee.

The screenshot shows a 'Submit Decision' dialog box. It has a title bar 'Submit Decision' and a message 'You selected "Approve".'. Below the message is a text input field with a dashed border. At the bottom right are two buttons: 'Submit' and 'Cancel'.

6. To Reject the travel documents select the **Reject** button at end of the screen – the following pop up box presents

A dialog box titled "Submit Decision" with a light gray background. The text "You selected 'Reject'." is displayed in the center. Below the text is a rectangular text input field with a dashed border. At the bottom right of the dialog box are two buttons: "Submit" and "Cancel".

Submit Decision

You selected "Reject".

Submit Cancel

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

7. Continue this process until all documents have been Approved/ Rejected.

The following documents require manager approval and must be approved and valid (in date) for Mileage to the claimed:-

- a) Employee Declaration- required when setting up travel privileges or when previous document expires
- b) Vehicle Licensing Certificate – Uploaded by employee when car details have changed
- c) Vehicle Insurance Certificate - Uploaded by employee when insurance is renewed or vehicle has changed
- d) Letter of Indemnity - Uploaded by employee when insurance is renewed or vehicle has changed
- e) Passenger Indemnity (where necessary) – Uploaded by employee when insurance is renewed or vehicle has changed

Once items are approved or rejected they will be removed from the Manager's Inbox

Items listed from Employee who do not report to you

1. If a Manager finds leave/travel requests or documents that relate to an employee that does not report to them there is an option to forward the item to the OM Admin person in their specific area. The OM Administrator will move the requests for approval to relevant manager and will amend the relationship to the correct manager to ensure that this is rectified going forward.

The screenshot shows a 'My Inbox' interface with a search bar and a list of tasks. The selected task is 'Patricia Monahan's Leave Request'. The details for this request are as follows:

Task Name	Workflow System user	Priority	Date Requested	Status
Approve trip of Kristen Murphy	Workflow System user	Medium	02.08.2019	Overdue
Patricia Monahan's Leave Request	Workflow System user	Medium	06.08.2019	Overdue
Approve trip of Kristen Murphy	Workflow System user	Medium	01.09.2019	Overdue



The detailed view of the 'Patricia Monahan's Leave Request' shows the following information:

Field	Value
Personnel No.:	30707228
Date(s) Requested:	06.08.2019
Leave Type:	Annual Leave
Requested:	1 day
Available Balance:	-80.35 hours
Total Deduction:	7.20 hours

At the bottom of the interface, there are buttons for 'Approve', 'Reject', 'Show Log', 'Claim', and 'Forward'.

Click on Forward and input OM Admin in the search and select accordingly.

The screenshot shows a dialog box titled 'Forward selected task to...'. The search bar contains the text 'OM Admin'. Below the search bar, the results show 'No recipients found'.

2. To exit My Inbox choose the Back arrow  or Home Button .