Australian Government
Department of Finance
Independent Parliamentary Expenses Authority

PEMS

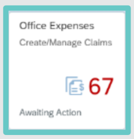
HELP GUIDE

Personalise my claims dashboard

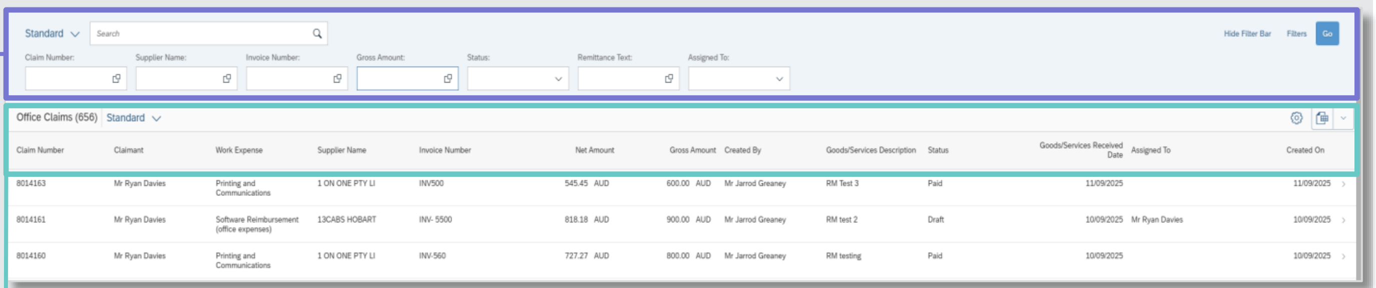
This guide explains how to customise your office expenses dashboard to manage office claims. You can tailor columns and filters to present the information you use most often, set a favourite view to display by default and export the claims list to Excel.

Overview of the Office Claims Dashboard

1. From the PEMS homepage, click the **Office Expenses** tile to open the office dashboard.



2. The dashboard contains two distinct sections:



The top section contains search and filter fields to help you find specific claim records.

- Using the **search field** will return records that contain your keyword in the Claim Number, Invoice Number, or Transaction Type fields.
- Using the **filter fields** will return records that match the specific value/s you enter in each field.

Type into the search or filter fields and click '**Go**' to display the results.

The lower section contains the claims list.

You can customise the displayed columns, the sort order and apply filters (see the *"Customising your claims list"* section for instructions).

There are also a number of pre-defined 'views' available with different columns and/or filters already applied to help you perform specific office tasks:

- **All draft claims (incomplete/staff review) -** Draft claims that are not yet complete or need review from another staff member.
- **Review for Certification -** Claims for your Parliamentarian to certify.
- **Claims Awaiting Action -** Claims at Draft, Awaiting Certification, or Returned.
- **Claims created by Department of Finance**
- **Claims created by My Office**

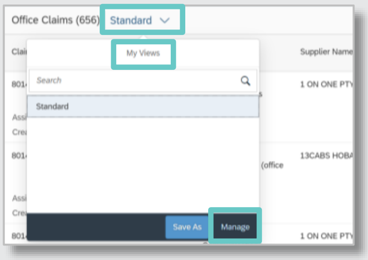
Note: You will need to favourite specific views for them to show in the 'My Views' drop-down. See the *"Add favourites to 'My Views' list"* section for instructions.

Add favourites to 'My Views' list

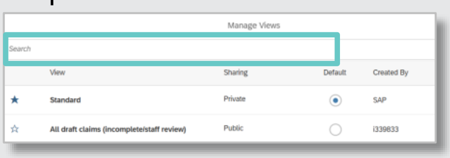
For fast access to views you use regularly, save them to the 'My Views' drop-down list.

1. The name of the view you are currently using appears in blue above the claims table.

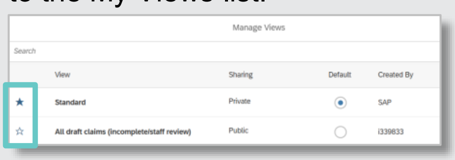
   Click the **down arrow** next to the view name to open the **My Views** drop-down list, then click **Manage**.



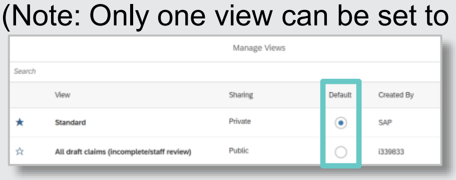
2. Browse the list or use the Search field to find a specific view.



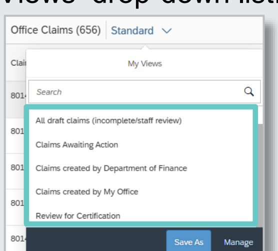
3. Click the **star icon** next to the view to add it to the My Views list.



4. If you would like this view to be used by default each time the office dashboard opens, select the radio button in the '**Default**' column. (Note: Only one view can be set to default.)



5. Click **Ok.** The view/s will appear in the 'My Views' drop-down list.

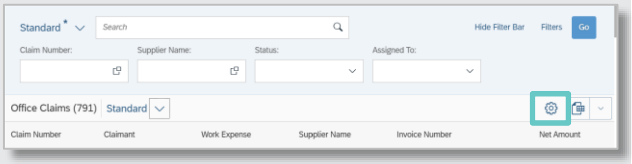


   Select the view from the drop-down to apply that view.

Customising your claims list

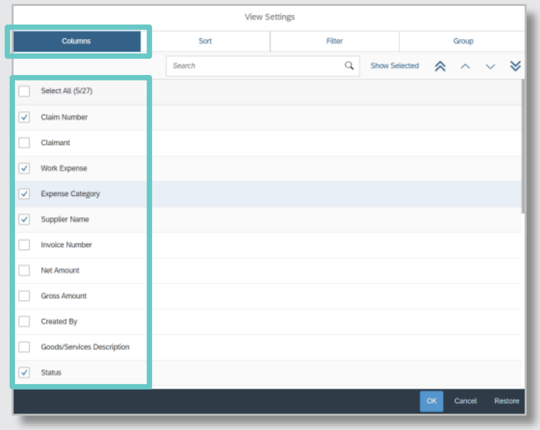
Add or remove columns, change the sort order or group information by a selected field.

1. Click the **cog icon** to open the View Settings window.

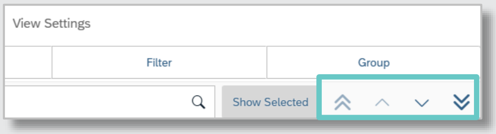


2. The '**Columns**' tab opens by default. The columns currently displayed are ticked.

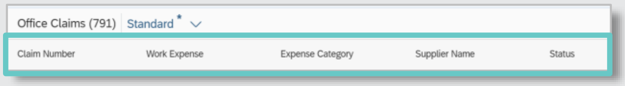
   Tick or un-tick the checkboxes to show or hide the columns.



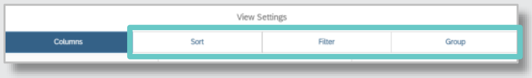
3. Use the **arrow buttons** to re-order the columns.



4. When finished editing, click **OK**. The selected columns will appear on the dashboard claims list in the order specified.



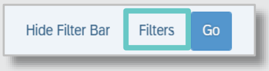
4. If desired, using the other **View Settings tabs** to change the **sort** order, **filter** values in/out, or **group** claims by a particular field.



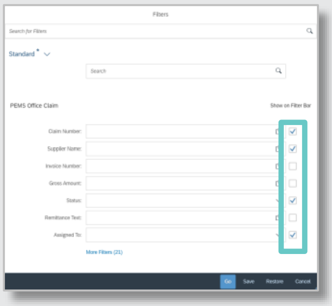
Customising dashboard filters

Add or remove filter fields that show in the top section of the dashboard.

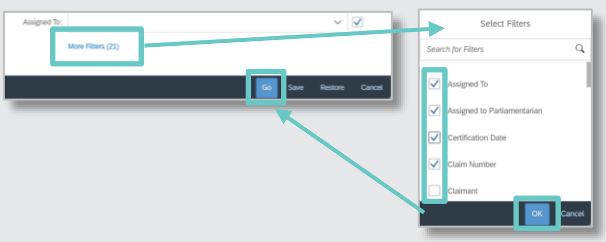
1. Click the **Filters** link at the top-right of the screen. The Filters window will open.



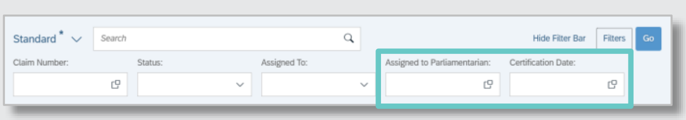
2. Any filters currently applied will show here. **Tick or un-tick** fields to show or hide them on the dashboard.



3. To add new filters, click on **More Filters** and **check or uncheck** fields to show/hide them. Click **OK** in the 'Select Filters' window, and **Go** in the 'Filters' window to apply the changes.



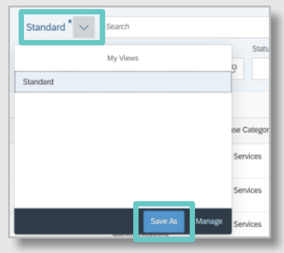
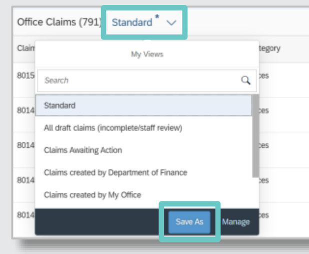
4. The dashboard will update with your selected filters.



Saving your custom views or filters

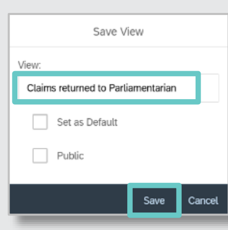
When changes are made to the claims list view or filter section, an asterisk (*) displays next to the view/filter name. This means that the changes are unsaved.
You can save your changes to use again at any time in the future.

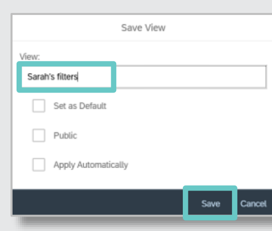
1. Select the drop-down arrow next to the view or filter name and click **Save As**.

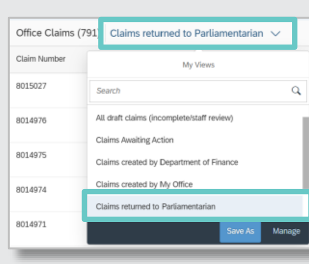
2. Enter a meaningful name.
   You can also select:
   - '**Set as Default**' if you want this to be your default view/filter display.
   - '**Public**' if you want other people to be able to use this view/filter as well.
     <u>Note</u>: Public views/filters are available to <u>all</u> PEMS users (not just other members of your office), however they can only see information from their own office's claims.
   - '**Apply Automatically**' (for filters only) if you want to run this filter by default as soon as the screen opens.

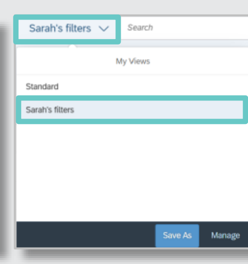
   Click **Save**.





3. Your custom view/filter will now appear in the list for future use.

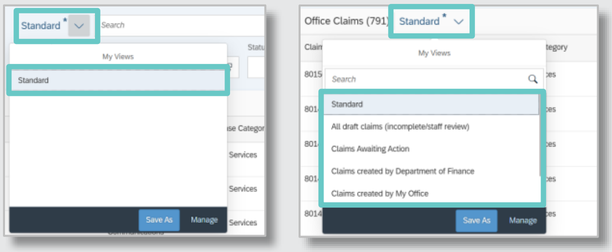




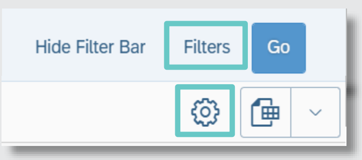
Edit a custom view/filter

Note: You can only edit views/filters which you created.

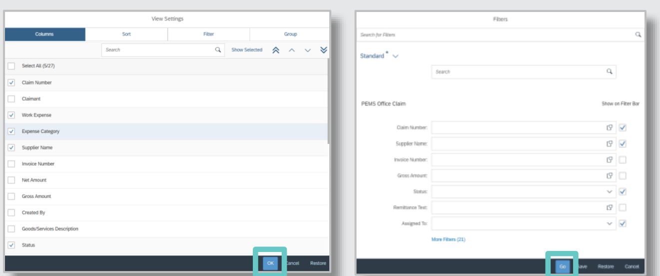
1. Click the **down arrow** next to the view/filter name select the view/filter to apply.



2. Open the settings by clicking the **cog icon** (for views) or **Filters** link (for filters)

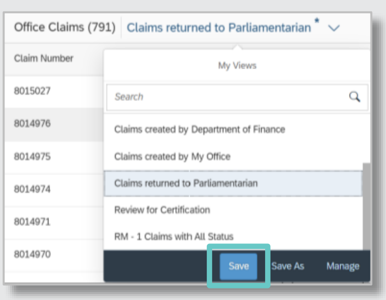


3. Make changes as desired and click **OK**.



You will notice an asterisk (*) next to the view/filter name to indicate unsaved changes.

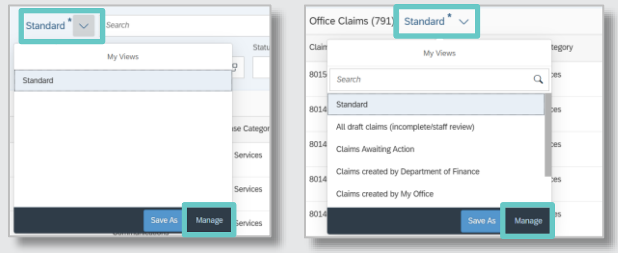
4. Click on the drop down next to the view/filter name and select **Save**.



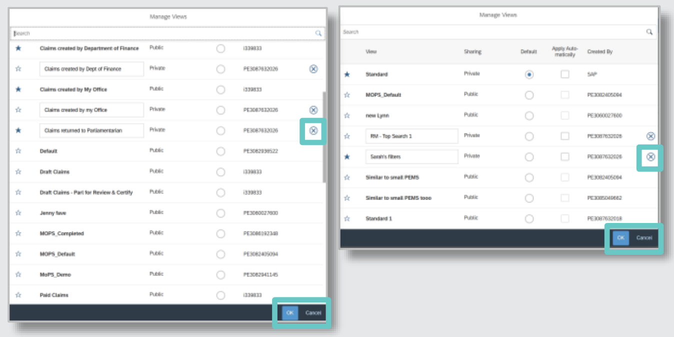
Delete a custom view/filter

Note: You can only delete views/filters which you created.

1. Click the **down arrow** next to the view/filter name and click **Manage**.

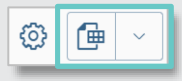


2. Find the view/filter to delete and click the **X** icon. Click **OK** to confirm or **Cancel** to undo the deletion.

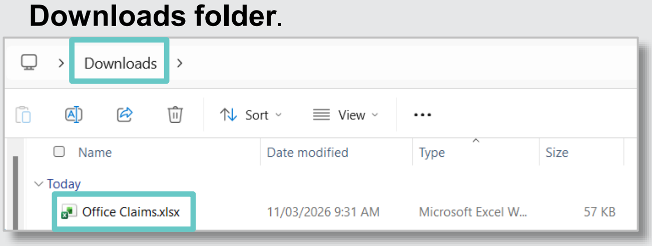


Export dashboard data

1. Click the **excel icon** above the claims table on the right-hand side to 'Export to Spreadsheet'.



2. The export will run. Once complete the spreadsheet will be available in your **Downloads folder**.



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For further information or support

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