

Claim Viewer

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Permissions

You will require an Access Role with the following permissions:

- User Management (Access Roles)

Overview

The Claim Viewer is a search feature that allows you to search for and view claims within Assure Expenses. If you have the correct permissions, you can view unsubmitted claims as well as both paid and unpaid submitted claims. This removes the need to login as a delegate when you want to quickly find a claim.

You may also be able to edit previous claims from the Claim Viewer if your organisation has enabled the 'Previous claims can be edited' General Option.

Implementation

1. Enable the Claim Viewer feature on the appropriate Access Roles. Any users which have been assigned an Access Role with this permission will then be able to use the Claim Viewer from homepage.

<input type="checkbox"/> Miscellaneous	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Add Expense For Employee via API	<input type="checkbox"/>	<input type="checkbox"/>	
Bank Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Vehicle Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Check & Pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Claim Viewer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. The claims that a user is permitted to search for is controlled by the Reports Access option on their Access Role. Set the appropriate permission to determine the level of data that they have access to view.

Reports Access

Select what data can be reported on by this access role

All data

Data from employees they approve

Data from the following access roles: [Set Access Roles](#)

Searching for a Claim

1. Navigate from the homepage to the **Claim Viewer**.
2. Search by claimant or by claim name. Relevant search results will be displayed as you type.

Claim Viewer

Search by Claimant

Claimant  

Search by Claim Name

Claim name 

- Alternatively, click  to view a list of claimants which you are permitted to view data for. You can then select the appropriate claimant by clicking 

Claimant Search

	Username	Title (Mr/Mrs/Dr)	First Name ▲	Surname	E-mail Address
	Ana	Ms	Ana	Organdjiska	ana.organdjiska@rldatix.com
	Antonio	Mr	Antonio	Krstevski	antonio.krstevski@rldatix.com
	Approver2	Mr	Approver	2	adam.bowler@selenity.com
	Approver3	Mr	Approver	3	adam.bowler@selenity.com
	Approver1	Mr	Approver	1	adam.bowler@selenity.com
	luketAzureNewEmployee	Mr	Azure	Azure	luket@selenity.com
	Chris.Hammersley	Mr	Chris Hammersley	Chris Hammersley	Chris.Hammersley@rldatix.com
	claimant	Mr	claimant	claimant	adam.bowler@selenity.com
	KieronClaimant	Mr	Claimant	Syke3	kieron.sykes@selenity.com
	corry	Mr	Corry	Littlefair	testers@selenity.com

- Click **Search**. This will display any matching claims based on your search criteria.
- Click the claim name to view more details about the claim. This will display the Claim Details page outlining all key information about the claim.

Note: Claims can be edited post-approval if the 'Previous claims can be edited' General Option is enabled. Any changes made will be displayed in the Claim History. This is particularly useful for updating information such as Cost Codes for approved claims if they are no longer applicable.

