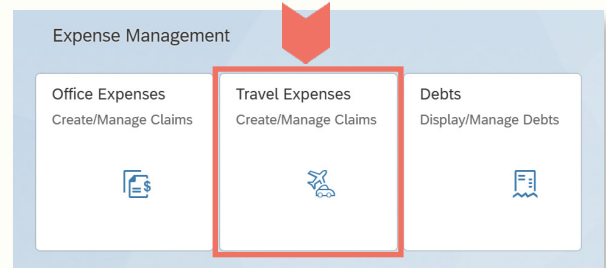


Filter travel expenses and save views in PEMS

1 Open the Travel Expenses tile

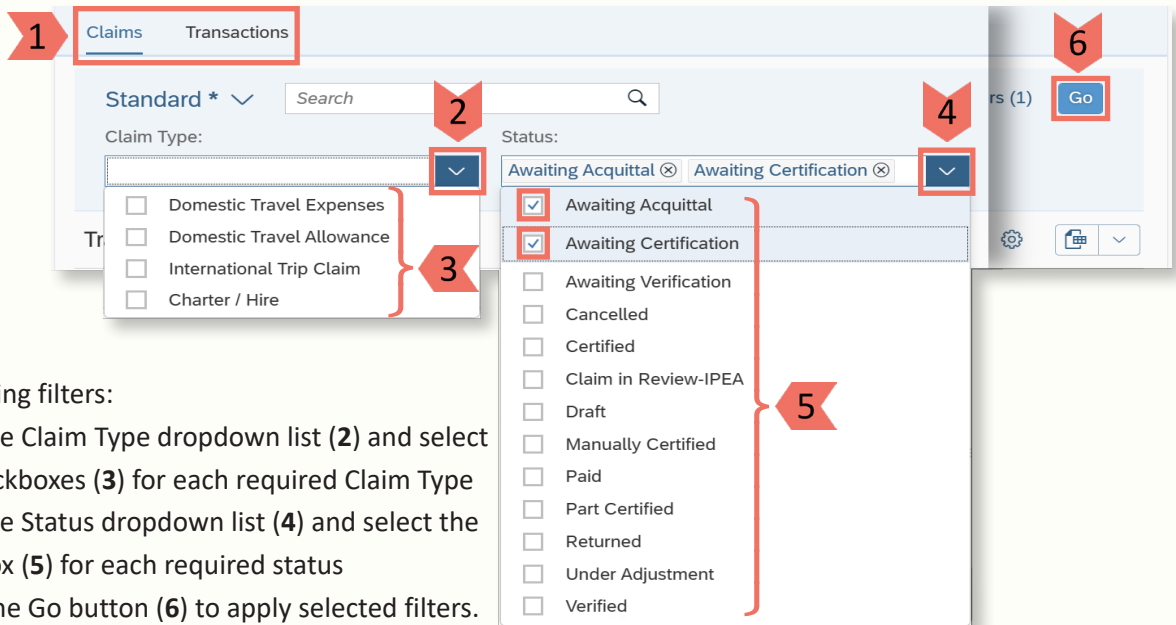
To access the filter and view controls:

- Log into PEMS
- Select the Travel Expenses tile.



2 Using the existing filters

Existing filters are available in the Claims and Transactions tabs (1) of the Travel Expenses tile. On the Claims tab, the existing filters are Claim Type (2) and Status (4). Existing filters can be applied individually or in a combination of filters.



To use the existing filters:

- Open the Claim Type dropdown list (2) and select the checkboxes (3) for each required Claim Type
- Open the Status dropdown list (4) and select the checkbox (5) for each required status
- Select the Go button (6) to apply selected filters.

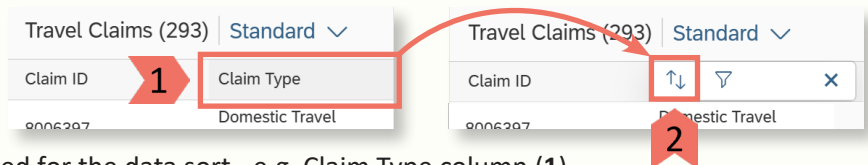
3 Filter by column heading

Expenses can be sorted and filtered using controls accessed from each column heading in the expense tile. Selecting a column heading reveals a Sort icon (↕), a Filter icon (🔍) and the Cancel icon (✕).

a. Sorting expense data

To sort the data displayed:

- Click once on the column to be used for the data sort - e.g. Claim Type column (1)
- Select the Up-Down Double Arrow sort icon (↕) (2) to sort the data in ascending (≡ A→Z, 1→10) order
- Select this icon again to sort data in descending (≡ Z→A, 10→1) order.



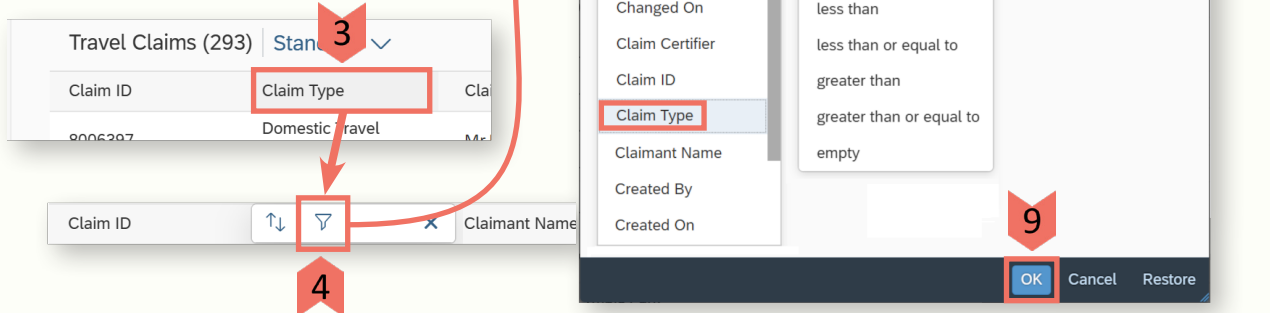
Filter travel expenses and save views in PEMS

b. Filtering expense data

Filters can be applied individually or in combination to refine the data you wish to display.

To filter data:

- Click once on a column heading (3)
- Select the Filter icon (4).



This opens the Define Filters screen. Filter options for the data to be included in your display are shown.

- Select the column heading from the dropdown list (5)
- Select the condition for your filter from the condition dropdown list (6) e.g. 'contains', 'equal to' etc
- Note:** 'equal to' is case sensitive.
- Type a word, phrase or select a date to filter the selected column data by (7) e.g. 'travel expense'.

To add further column filter conditions:

- Select the Plus icon (+) (8)
- Select the filter column (5), condition (6) and filter word, phrase or date (7) as required.

To accept the filter settings, select the OK button (9).

To edit or amend a filter, select the Filter icon (🔍) from any column heading to open the Define Filters screen.

Complete the above steps under the Exclude function to apply filters to exclude data from your display.

4 Add additional columns to your view

A range of columns are available to assist with viewing, sorting and filtering data. To add, hide, re-order, sort and group columns:

- Select the Cog icon (⚙️) (1).

This opens the View Setting screen.

- Select the Columns tab (2).

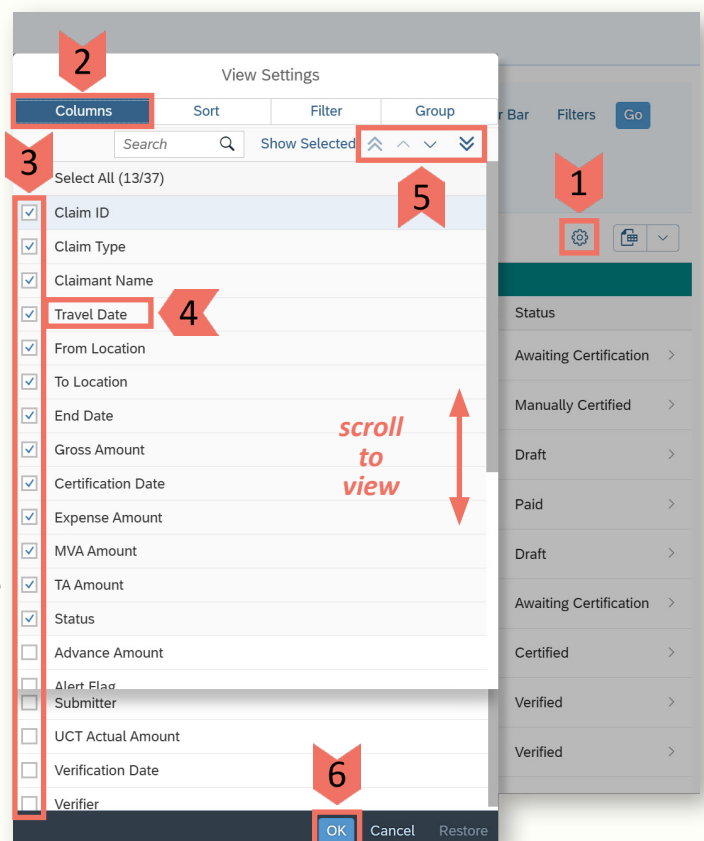
To add or remove a column from the data display:

- Select or deselect the required column checkbox (3).

To change the column order:

- Select a column by clicking on the column name e.g. Travel Date (4)
- Use the Up (^), Down (v), Beginning (⤴) or End (⤵) icons (5) to move the column position.

To close the View Settings screen and apply the above changes, select OK (6).



Filter travel expenses and save views in PEMS

5 Save and use custom views

Any custom view of expense data with added or changed filters or columns can be saved as a custom view. These custom views can be easily accessed later.

a. Save a custom view

To save a custom view:

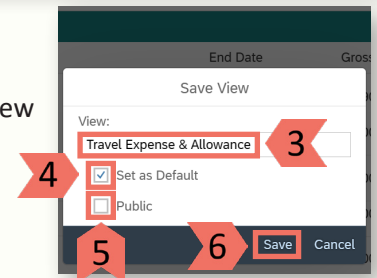
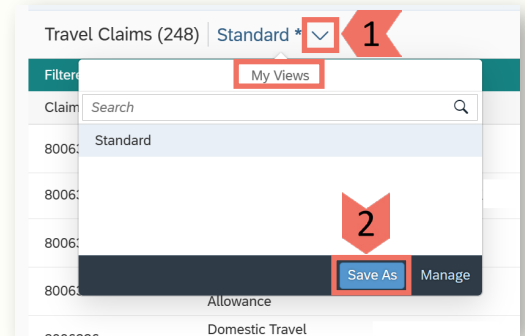
- Open the My Views menu by selecting the Down icon (∨) next to the view heading (1), e.g. Standard.

Note: An asterisk (*) will appear next to a custom view name when changes (new columns, filters etc) have been made and not saved.

- Select Save As (2).

This opens the Save View screen.

- Type a unique name for the custom view (3)
- As required, select the Set as Default checkbox (4) to have this view open as your default view
- As required, select the Public checkbox (5) to allow your view to be used by other users (See **Footnote****)
- Select the Save button (6).

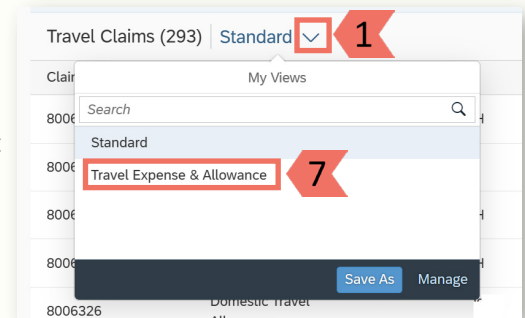


b. Selecting a custom view

To display a previously saved custom view:

- Open the My Views menu by selecting the Down icon (∨) next to the view heading (1)
- Select the required view from the My Views menu (7).

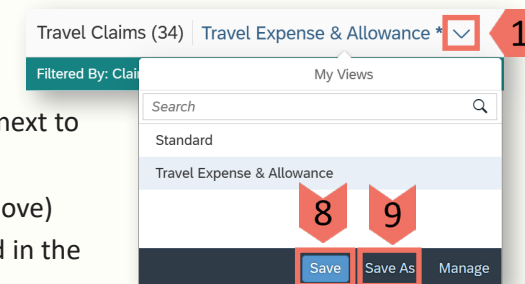
This displays the expenses screen with the selected view filter and column settings applied.



c. Modifying a custom view

To modify a custom view:

- Open the My Views menu by selecting the the Down icon (∨) next to the screen heading (1) e.g. Travel Expense & Allowance
- Select the view to be modified from the My Views menu (7 - above)
- Modify the filter, sorting and column configuration as described in the previous sections, then either:
 - Modify the original custom view by :
 - Selecting Save (8), or
 - Create a new view by :
 - Selecting Save As (9)
 - Name the new custom view, select the required checkboxes and select Save (3, 4, 5 & 6 - above).



Footnote: ** Creating a Public view allows **all** PEMS users (within and outside your office) with access to your view. While users that do not have access to your data cannot access your office's travel claims and transactions, users can see and use the filter and column settings of your view in their travel claims screen. If Public view is selected, IPEA recommends you use generic titles when naming your custom views and not include personal names.

Filter travel expenses and save views in PEMS

6

Managing views

To rename, delete or set a view as default:

- Open the My Views menu by selecting the the Down icon (∨) next to the view heading (1) e.g. Standard
- Select the Manage button (2).

This displays the Manage Views screen.

To choose those views that will appear in your My Views menu:

- Select or deselect the required Star icons (★)(3).

To choose your default view

- Select the Default radio button (⦿) for your preferred default view (4).

Note: The default view can also be selected from the Save View screen shown in Step 5a.

To rename your custom view/s:

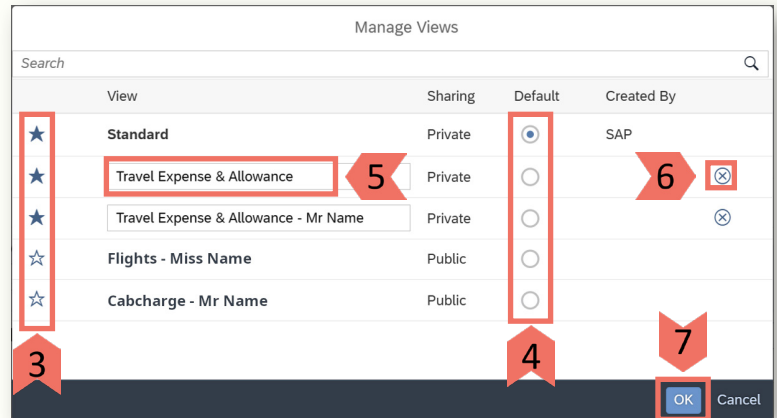
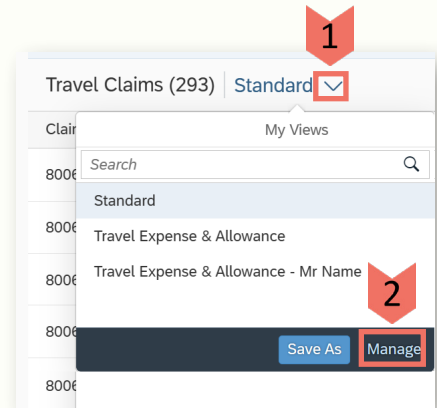
- Select the view's name textbox (5)
- Edit the text as required.

To remove a view:

- Select the Delete icon (⊗) for the custom view's row (6).

To save the changes you have made and exit the Manage Views screen

- Select OK (7).



The steps shown in this guide can be used when working with data in either the Claims or Transactions tabs of the Travel Expenses tile.