

Administration & Reports Training



Using **expenses** effectively can help maximise the control and compliance you have over your employee expenses.

“ We learnt a fair few tricks throughout the day, and the hospitality was legendary! ”

Day 1 - Administration

Topics Covered

Administration: Policy Information. An overview of the **expenses** policy information making the system unique for your organisation.

- Company Policy
- Broadcast Messages
- Flags & Limits
- FAQs

Administration: Base Information. An overview of **expenses** base information governing the system.

- Cost Codes
- Currencies
- Countries
- Locations
- Expense Categories
- Expense Items
- Allowances
- Reasons
- Project Codes
- Departments
- P11D Categories
- Pool Cars
- Home to Base Rules

Administration: User Management. An overview of creating new users, and understanding the access that can be given.

- Access Roles
- Item Roles
- Employees
- Teams
- Budget Holders
- Signoff Groups

Administration: Tailoring. An overview of **expenses** tailoring including how to switch on and off specific options, change the look and feel of the system and creating company specific fields.

- Print-out
- Default View
- Default Print View
- Colours
- Company Logo
- E-mail Messages
- Company Details
- General Options
- User Defined Fields
- New Expenses
- Filter Rules
- Tooltips

Administration: Additional Information. An overview of any additional administrative options that can be changed.

- Password Options
- E-Mail Server
- Main Administrator
- Regional Settings
- Audit Log

Day 2 – Reports

Topics Covered

Report Categories

- Personal Report Category
- Global Report Category

Creating Reports

- Expense Report
- Paid Claims

Filtering

- Employee Directory by Department

Report Templates

- Create an Expenses Claim Report Template
- Create a Claim Current Stage Report
- Create a Claims by Date Report

Static and Calculated Columns

- Creating a Report with a Static Column
- Creating a Report with a Calculated Column

Sum, Average, Max and Min

- Using Sum, Average, Max and Min

Cost

This course is available at a cost of £750 +VAT for the full event; this will cover the cost of lunch and training material.

Location

The event is held at the excellent conference and training facilities at Software Europe's head office, Lincoln UK.

[Click here for directions](#)

One-to-One

Whilst our training aims to ensure that each attendee does receive the attention they need and get all they require out of the event; we will be happy to offer training on a one-to-one basis throughout the day. One-to-one sessions can be requested in advance.

Editing a Report

- Editing a Report and Hiding a Column
- Edit a Report and Sorting a Column
- Editing a Report and Grouping by a Column

Temporary Changes

- Grouping and Sorting a Column at Runtime
- Grouping by a Column using 'Column Change'
- Adding a New/Extra Column to the Report
- Changing the Report Filter

Export

- Export Options
- Exporting a Report to an Excel Spreadsheet
- Scheduling an Emailed Copy of the Report as a Spreadsheet

