# Agresso On-line Expenses – Quick Card

## Accessing Agresso Self Service

Agresso on-line expenses is access through ADFS (SSO).
Follow the steps below to access the system

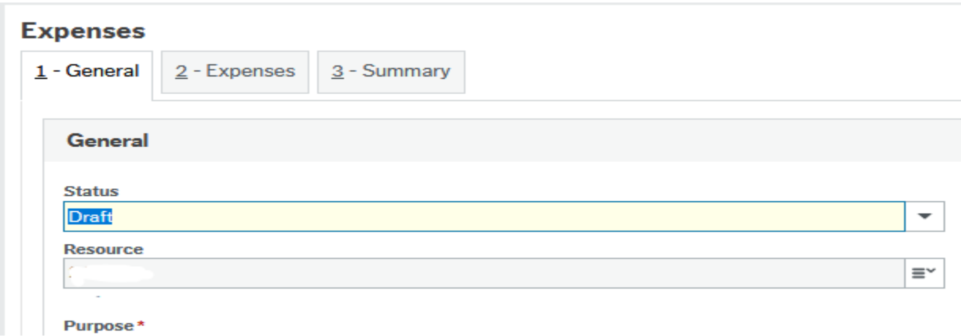
1. Click on 

 and from the menu choose **Expenses**

## Expenses

Expenses for travel and other out of pocket items are claimed electronically via Agresso Web.
To claim Expenses, follow the steps below:

1. Click on Expenses from the menu




2. Enter the required details as follows:

**Status**- The default is **Draft**. Leave as Draft until the expense claim details are complete and ready to be submitted to workflow for approval. Once all the details have been added change to **Ready**.

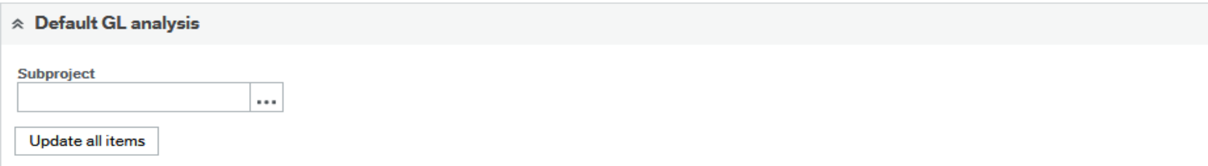
**Resource**- Name and resource ID is automatically populated based the user signed on via SSO

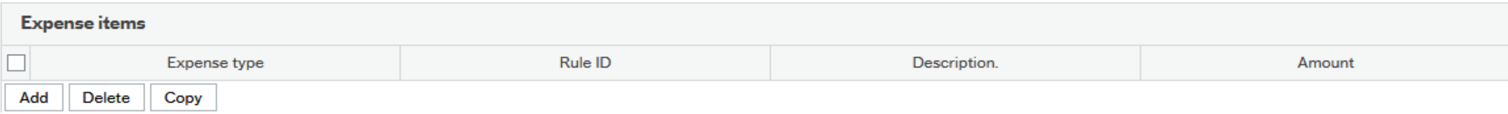
**Purpose**- Enter the reason for your claim/business trip details

**Additional Information**- Enter any other details you wish the approver to be aware of or any names if claiming staff entertainment/hospitality

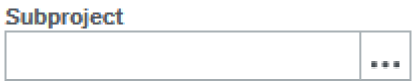
3. Click on Next step to move you to the Expenses tab

   If Agresso has not moved to the Expenses tab click on Next step again

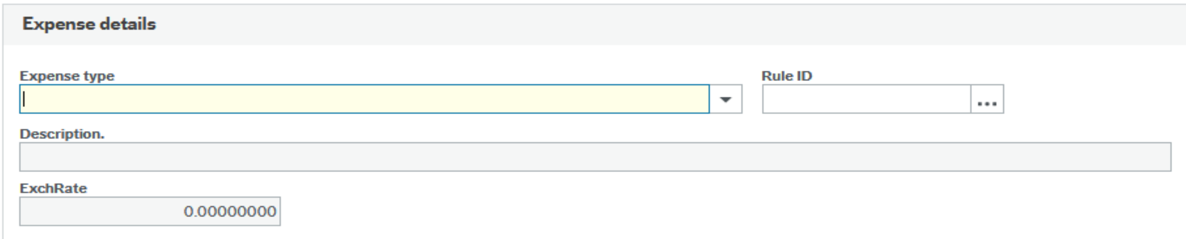


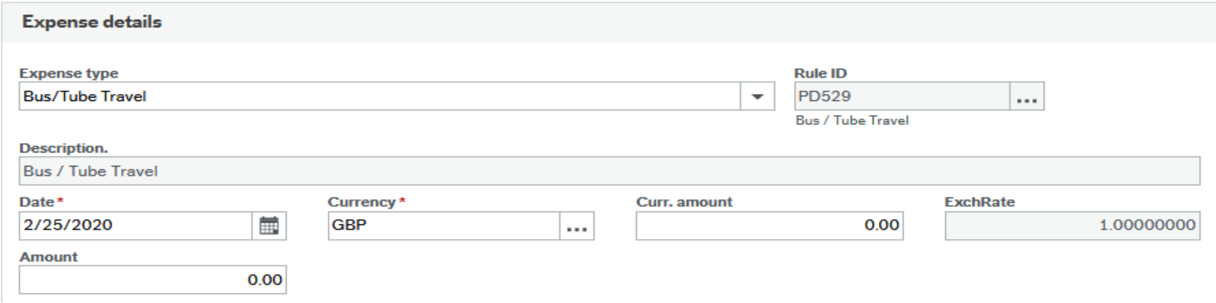

The **Expenses** tab is used to record expenditure type, reason for expense and the **Subproject** code to be charged.

4. Enter the Subproject code for it to be charged to, or use the 

dots at the side for a look up window to appear.
5. To add details to the **Expenses** tab, click Add and the following **Expenses items** section will be displayed




6. Click on the at the end of the **Expenses type** field and choose the relevant type from the list (e.g. Bus/Tube Travel)




Once the **Expenses type** is chosen the associated fields that require completion will be displayed in the **Expenses details** section.

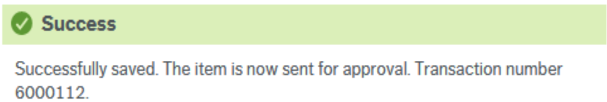
7. Enter the **Date** the expense relates to in the **Date** field
8. Enter the **Amount** in the Curr. Amount field and the Amount field will auto populate. NB. Mileage is number of miles, and price and number of nights for hotel
9. Attach copies of the receipts to back up your claim by clicking on at the top right-hand side
10. Repeat steps 4 to 9 until all expenses have been added.

***If ALL details have been added:***

11. Click on Next step to move you to the Expenses tab

    If Agresso has not moved to the Expenses tab click on Next step again

12. Click the at the end of the **Status** field and Choose **Ready** from the list
13. Click on Save to save the Expense Claim details, the following message will be displayed with a transaction number.




14. Make a note of the transaction number and submit your original receipts to payroll in a sealed envelope detailing the transaction number and your name on the front. NB No claims will be approved by payroll until the original receipts have been received.
15. To view the claim submitted click on Print preview

## Amending a Draft Expenses Claim

An Expenses claim can be added to at any time whilst in status **Draft**.
To amend a draft Expense claim, follow the steps below

1. Click on Expenses
2. Click on Open
3. Click on the **Transaction number** you saved.
4. Make any amendments following the **Expenses** section above

If the claim is now ready to be submitted follow the steps under the heading ***If All details have been added*** above.

If the claim isn't ready for submission, with more details to be added, save as a draft and follow the steps above as and when required.

Please remember to change to **Ready** when all complete.

## Travel Expenses/Workflow Enquiry

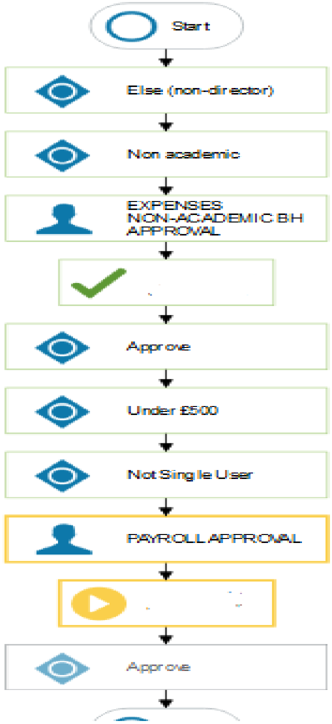
The travel expenses enquiry displays all electronic expenses claims and their workflow status

1. Click on Workflow enquiry - expenses
2. Your claims will be displayed

| | | | | |
|---|---|---|---|---|
| | Expense Claim Approval | CCM RIM Approval | 14 | Workflow in progress |
| | Expense Claim Approval | CCM RIM Approval | 14 | Workflow in progress |
| | Expense Claim Approval | Non-Director Expense Corrections | 14 | Rejected |
| | Expense Claim Approval | Non-Director Expense Corrections | 14 | Rejected |
| | Expense Claim Approval | Non-Director Expense Corrections | 14 | Rejected |
| | Expense Claim Approval | Non-Director Expense Corrections | 14 | Rejected |
| | Expense Claim Approval | Expenses non-academic BH Approval | 14 | Workflow in progress |

3. The results list the **Process, Step, Workflow state, Task owner, amount** and **ResID of claimant**

4. Click on to view the workflow map for the required row and the workflow map showing the current status of the expense will be displayed




## Payment of a claim

After the approval process is complete, claimants will be notified by email of the expected BACS payment date and amount. These will be paid separately from salary payments.

## Expenses enquiry reports

To check what expenses you have claimed for, a report is available that will allow you to view all past expenses in any 12-month period.

To view these

From the menu bar on the left-hand side,

Click on Reports


Click on My Expenses and then SGUL Expenses in past 12 months


## Expenses Contact

Should you have any queries, please contact [expenses@sgul.ac.uk](mailto:expenses@sgul.ac.uk)