

Entering Claim Details - Student

Entering an expense:

When you are ready to start adding lines, click on the **Add expense** button.

What did you spend?

<input type="checkbox"/>	Category	Expense date	Description
Add expense Copy expense Delete expense			

[Send for approval](#) [Save as draft](#) [View expenses](#) [Print](#) [Delete](#)

For each line of your claim, you will need to enter:

- The **Category** - this is a general description of the type of claim. A full list can be viewed by clicking on the drop-down on the right of the field or you can simply start typing and choose from the drop-down menu that comes up
- The **Date** - this will autofill with the date entered on the previous screen but can be overwritten with the date when expense incurred
- A **Description** - a more detailed description of the specific expense incurred
- **Currency** - this will default to GBP but can be overwritten with appropriate currency
- **Curr. amount** - the value of the line

UB Expenses 31/01/2018 x

Expenses > Expenses 31/01/2018

Expenses: Enter an Expense Claim (Staff)

What was the purpose?
Agresso Conference April 18 Date 31/01/2018

What did you spend?

Category	Expense date	Description	Currency	Curr. amount	Amount
Travel - Bus Ticket or Pass	31/01/2018	travel from Bath Spa to London Pa...	GBP	83.50	83.50
Meals, (Breakfast, Lun	31/01/2018	breakfast	GBP	5.65	5.65

You can view and amend additional GL information by clicking the drop-down arrow at the end of the line. Make sure your student number is filled in.

1 What did you spend?

Category	Expense date	Description	Currency	Curr. amount	Amount	
Travel - Bus Ticket or Pass	08/02/2018	Agresso Conference June 2018 - London	GBP	83.50	83.50	

ExchRate
1.00000000

Cost categories

Project code *	Student number *	Product Code *	Budget Category *
FINANCE OFFICE C CA-FN1GEN	<input type="text" value=""/>	Student Travel Arr P-TPA-00	General Expendit BR00

VAT Recovery status *

Partially recoverable
PR

[Apply to all](#) 

Tax code
No Tax

Tax system
No tax

On the right of the screen is an ongoing overview of your claim, showing all lines entered plus a running total.

Expense overview	
    	
Expenses	
08/02/2018	
Type	Amount
Agresso Conference June 2018 - London	83.50
Total	£ 83.50

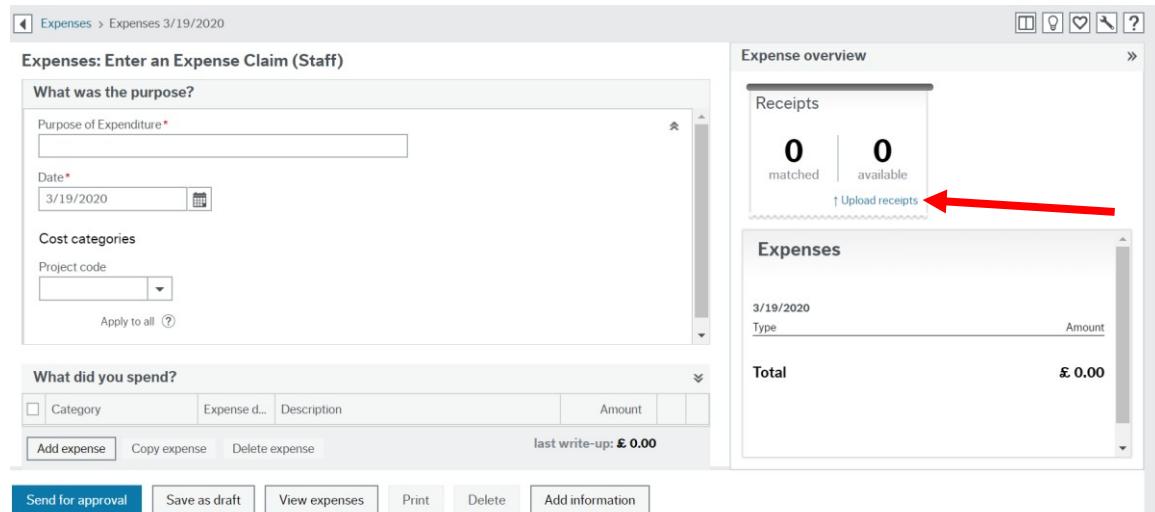
All expense claims must be supported by scanned or photo images of receipts, vouchers or equivalent evidence of the expense. These will be linked to the claim against the relevant line of expense and visible to the authorisers of your claim. Original copies of all supporting paperwork (e.g. hard copy receipts) must be retained by the claimant until the claim has been fully approved in Agresso and paid.

The maximum file size will be 10000KB and most file formats are acceptable including JPG, PNG, BMP, GIF, PDF, DOC.

The files will need to be available to the device you are logging into Business World (Agresso) on. An easy way to achieve this is to email them to yourself and download them. Alternatively, link your phone as an external drive to your computer.

Attaching receipts:

On the right-hand side under **Expense overview** there is now a **Receipts** box



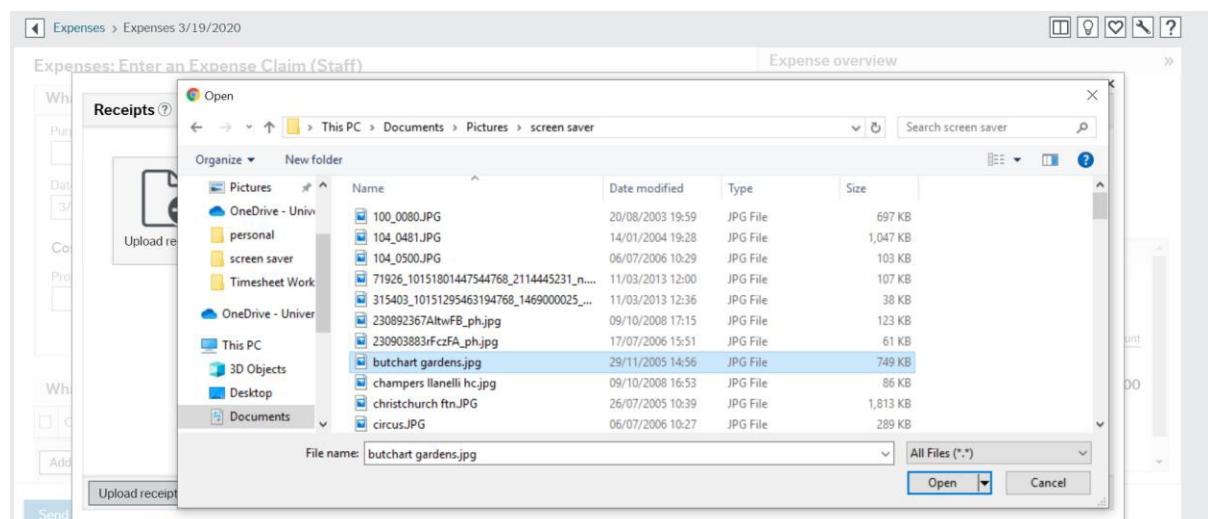
The screenshot shows the 'Expenses: Enter an Expense Claim (Staff)' screen. On the right, under 'Expense overview', there is a 'Receipts' section with '0 matched' and '0 available' receipts. Below it is an 'Expenses' section showing a total of £ 0.00. A red arrow points to the 'Upload receipts' button in the 'Receipts' section.

Click on **Upload receipts** and a pop-up screen will open



The screenshot shows a 'Receipts' pop-up window. It has a sidebar with filters like 'Pur', 'Date', 'Cost', 'Proj', 'Wh', 'Add', and 'Send'. The main area has a 'Upload receipts' button with a plus icon. At the bottom, there is another 'Upload receipts' button and a note '0 available receipts'.

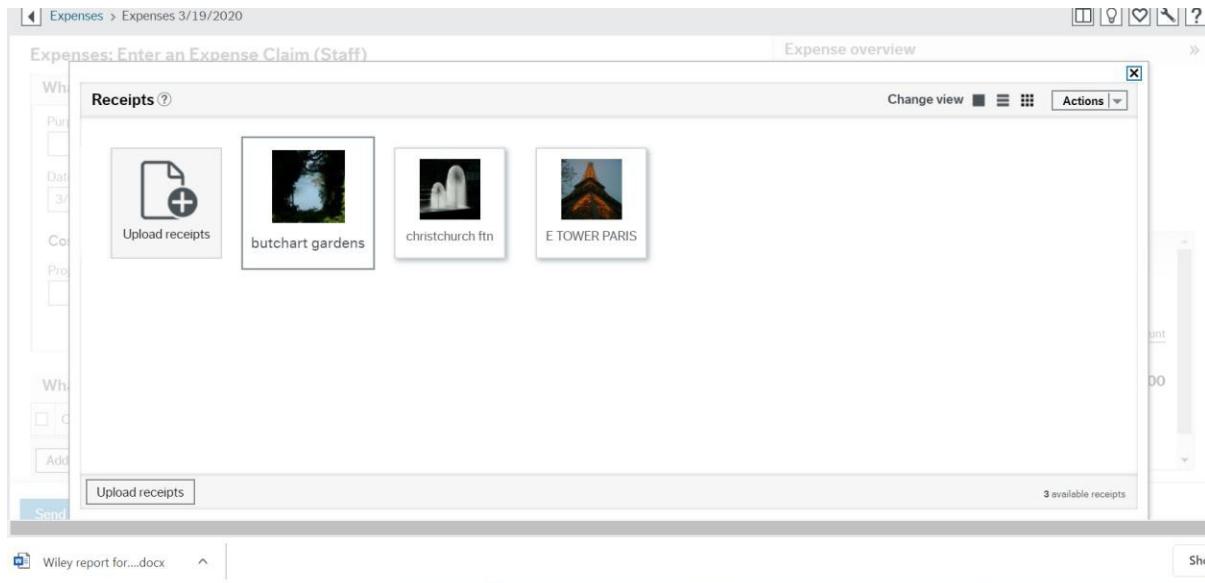
Click on **Upload receipts**. This will open another pop-up screen where you can search your device for files



The screenshot shows a 'Receipts' pop-up window with a sidebar and a main area containing a 'Upload receipts' button. Below it is a 'File name:' input field and a 'Open' button. An 'Open' file dialog is displayed, showing a list of files in the 'Pictures' folder of 'This PC'. The file 'butchart gardens.jpg' is selected. The dialog also includes a 'Cancel' button and a 'Search screen saver' search bar.

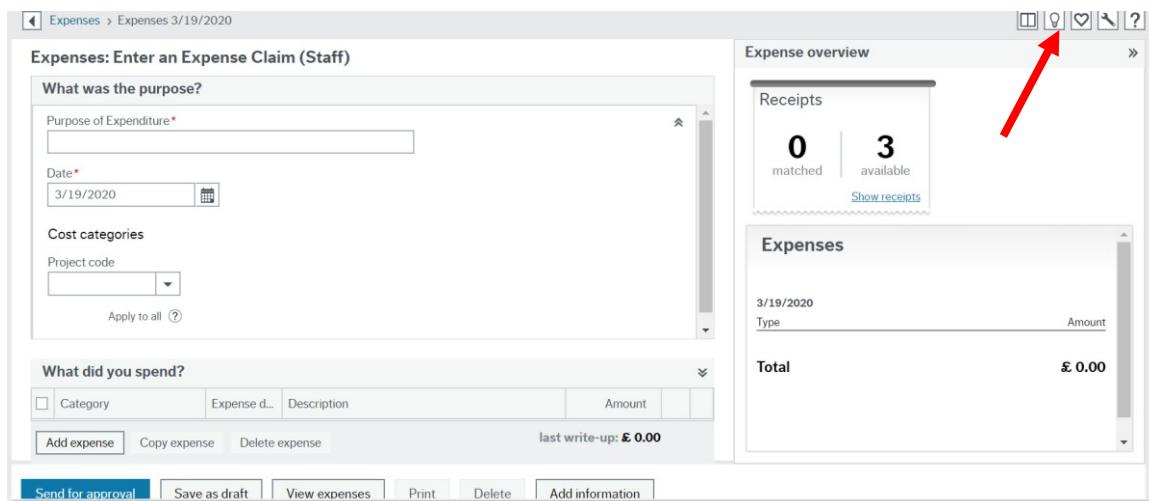
Click on the file you wish to add, this will appear in the File name at the bottom and **Open**
The file will be loaded onto the screen as an available receipt

Repeat this step for all files you wish to load



Click on the **X** (above Actions) to close the pop-up screen

The number of files loaded should show as the number of available receipts



Enter your expense claim. Guidance on how to complete an expense claim is available within Business World (Agresso) as a Knowly (click on the lightbulb icon) or go to <http://www.bath.ac.uk/agresso.bho/expenses/index.html>

Once you have entered all your claim line(s) click on **Show receipts** in the **Receipts** Box

Expenses: Enter an Expense Claim (Staff)

What was the purpose?
demo for attaching receipts Date 3/19/2020

What did you spend?

Category	Expense d...	Description	Currency	Curr. amount	Amount
		3/19/2020 test book 1	GBP	25.00	25.00
Com	3/19/2020	test line 2	GBP	33.00	33.00

Add expense Copy expense Delete expense last write-up: £ 58.00

Send for approval Save as draft View expenses Print Delete Add information

Receipts
0 matched 3 available Show receipts

Expenses
demo for attaching receipts 3/19/2020
Type test book 1 25.00
test line 2 33.00
Total £ 58.00

A pop-up screen will open

Receipts

Select the expense that matches your receipt.

Date	Category	Description	Curr...	Curr. amount	Amount
3/19/2020	(Catering use onl...	test book 1	GBP	25.00	25.00
3/19/2020	Communication -...	test line 2	GBP	33.00	33.00

Upload receipts Match to receipt 1 of 3 available receipts

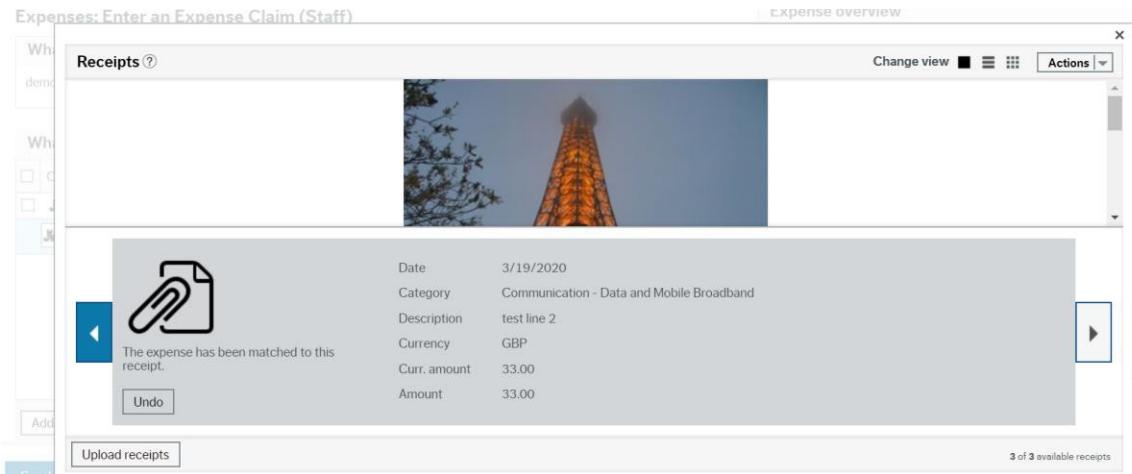
The first file will now be visible along with a box with the claim lines available to match that receipt to.

Tick the box on the left-hand side of the claim line you wish to match that receipt to and click on **Match to receipt**.

The next file will then appear. Repeat the match process above until all files you wish to link to the claim are matched

It is possible to match more than one receipt to a claim line.

The blue arrows can be used to move back and forward through the files



If you match a receipt incorrectly, please click on the receipt you wish to edit, using the arrows to move between receipts if needed. Use the **Undo** option to unlink it from the claim line

Once you have matched all receipts click on the X above **Actions** in the pop-up screen to close it

The **Receipts** box will be updated to show your receipts as matched

When you are happy with your claim, you can choose to either **Send for approval** (thus completing the claim) or **Save as draft** using the buttons at the bottom of the screen.

