

Expense claim approval and viewing receipts

Accessing the system

You will need to access a web browser via VPN, Uniapps or Remote Desktop as Business World (Agresso) is not available externally.

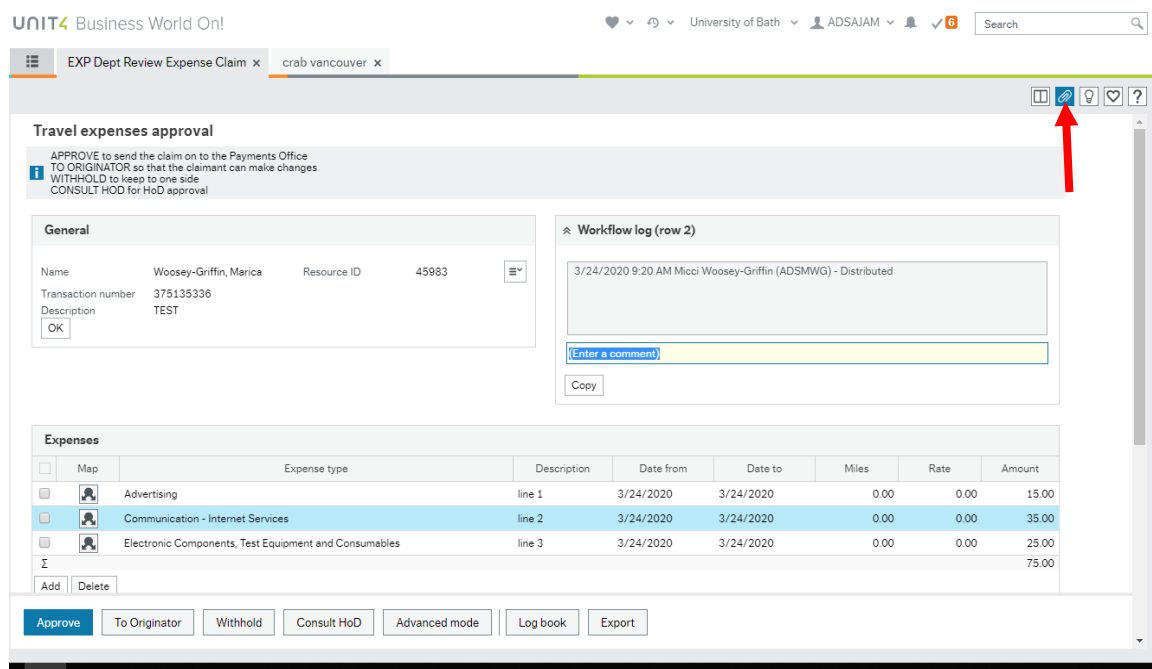
Guidance on how to do this is available in the **Working from home** section of the **Self Service Portal (TopDesk)** which can be found in the **Online Tools** section of the university website under **IT Services**.

Attaching Receipts

The system has been updated to enable users to upload scanned copies or photos of receipts. These will be linked to the claim and visible to you as authorisers of the claim. Original copies of all supporting paperwork (e.g. hard copy receipts) **must** be retained by the claimant. You will receive further guidance on what to do with them at a later date.

The claim approval process has not changed with the same options available

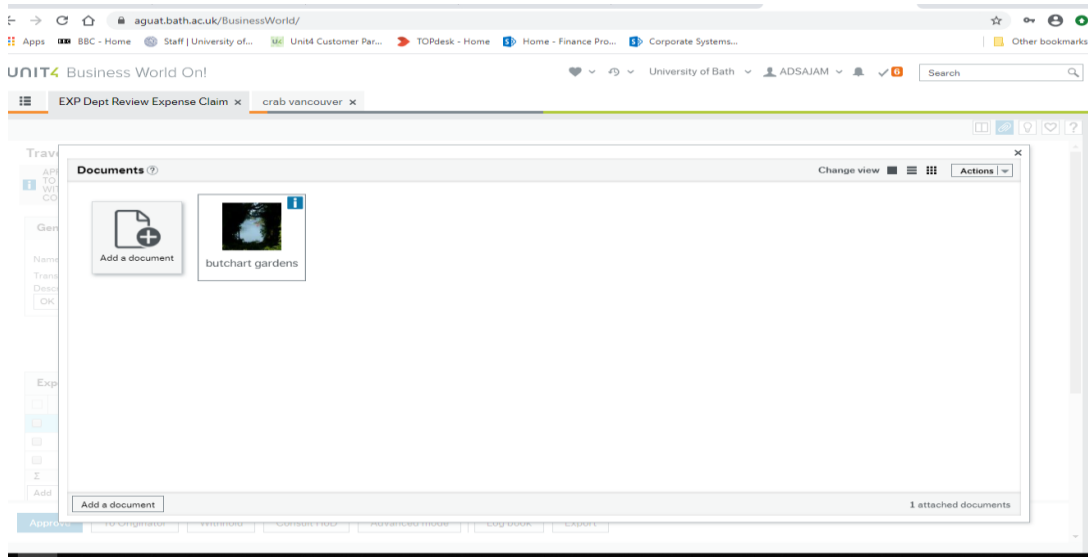
Open a task, the claim details will be visible.



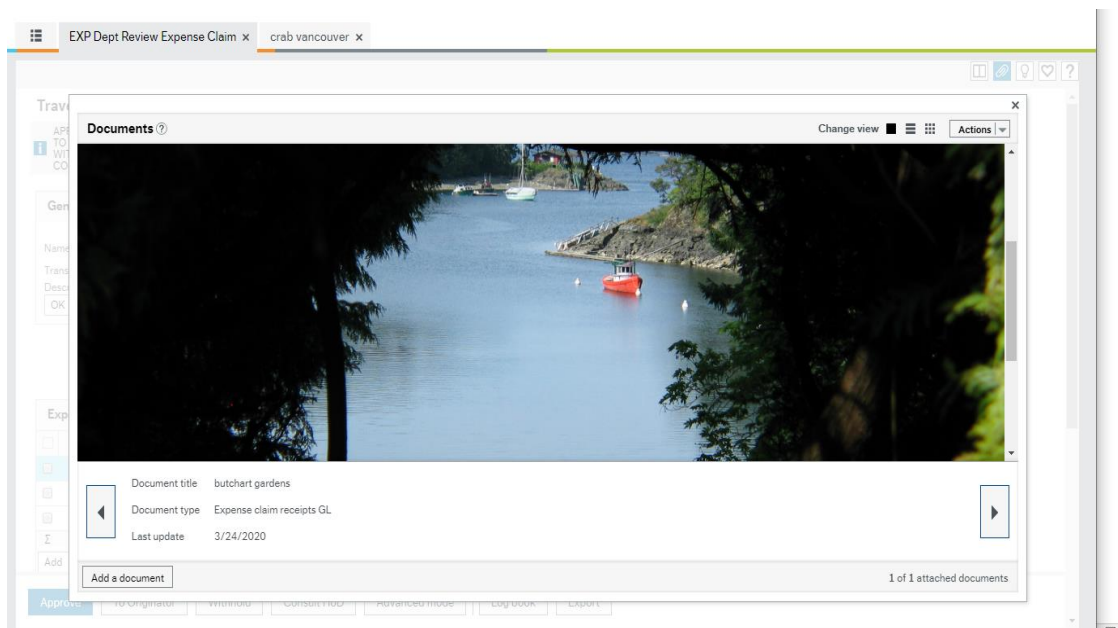
The screenshot shows the 'Business World On!' interface for an expense claim approval. The top navigation bar includes the UNiTA logo, user information (University of Bath, ADSAJAM), and a search bar. The main content area is titled 'Travel expenses approval' and contains a 'General' section with fields for Name, Transaction number, and Description. Below this is a 'Workflow log' section showing a log entry for 3/24/2020. The 'Expenses' section is a table with columns for Map, Expense type, Description, Date from, Date to, Miles, Rate, and Amount. The table lists three expense lines: Advertising (15.00), Communication - Internet Services (35.00), and Electronic Components, Test Equipment and Consumables (25.00). At the bottom, there are buttons for 'Approve', 'To Originator', 'Withhold', 'Consult HoD', 'Advanced mode', 'Log book', and 'Export'. A red arrow points to a paperclip icon in the top right corner of the interface.

To view the receipts attached, click on each line and the paperclip on the top right hand side will be highlighted in blue

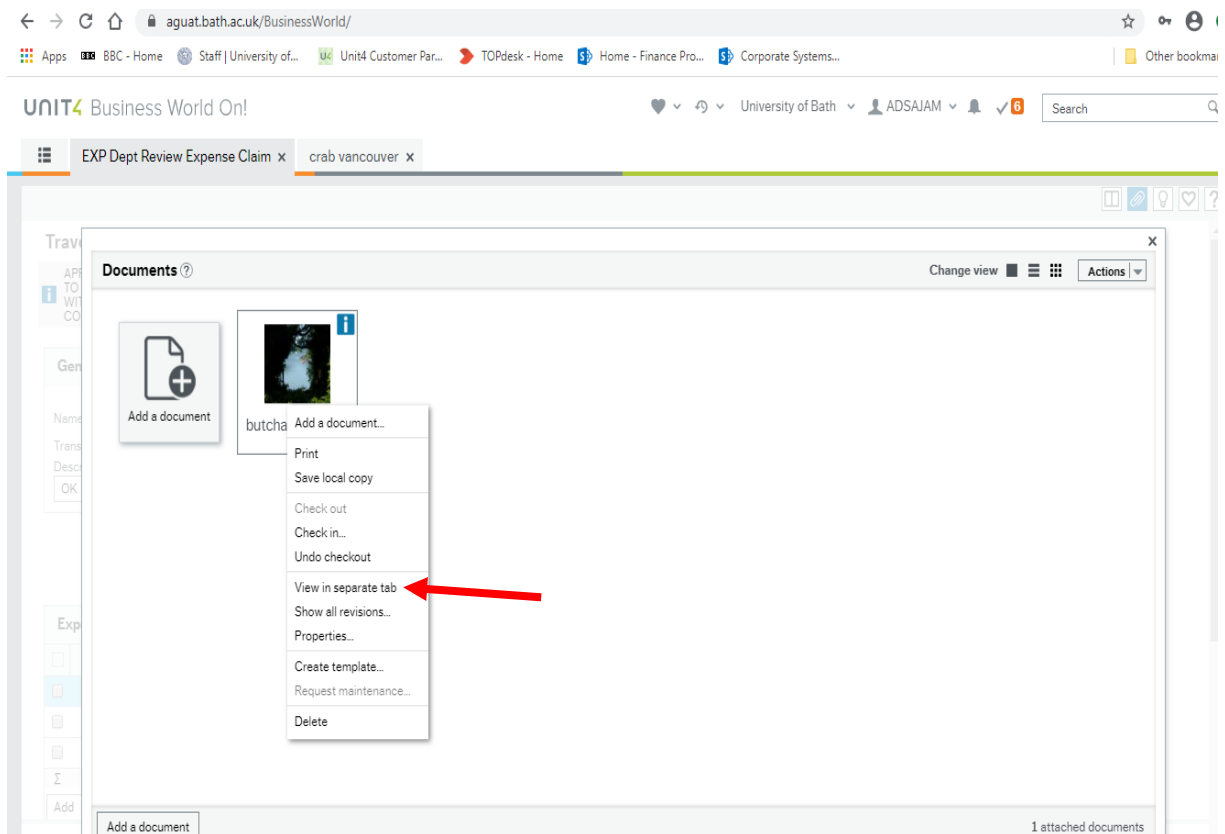
Click on the paperclip, this will open the **Documents** pop up screen with the receipt(s) for the line.



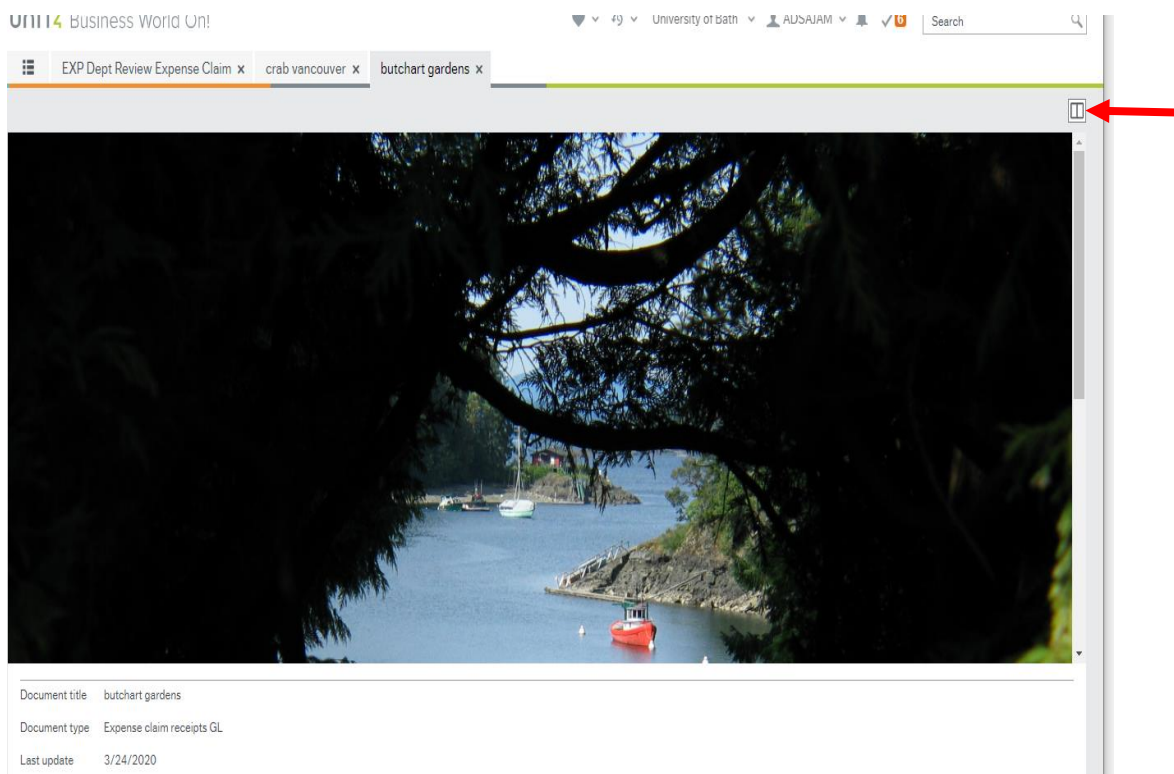
Click on the thumbnail to open the receipt in the Documents screen



To open the receipt in a separate tab, **right click** on the receipt and select **View in separate tab**



Another tab will open with the document enabling you to view both the image and the claim. Use the split screen option on the righthand side to see both simultaneously



Verify the receipt(s) against the claim line and repeat for all lines of the claim.

Process the claim using the standard task action buttons