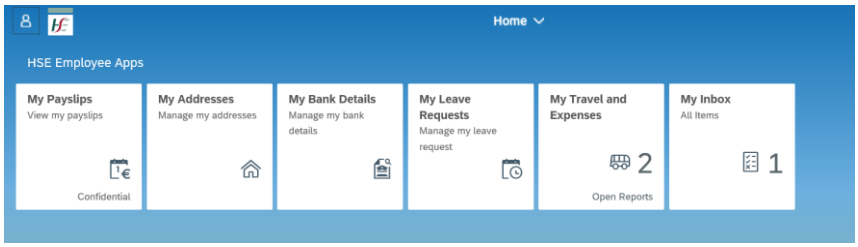
My Travel & Expenses

- To make a claim for one day only please click here
- To create a duplicate of an regular trip/journey please click here
- For an explanation of Errors and Warnings in My Travel & Expenses please click here

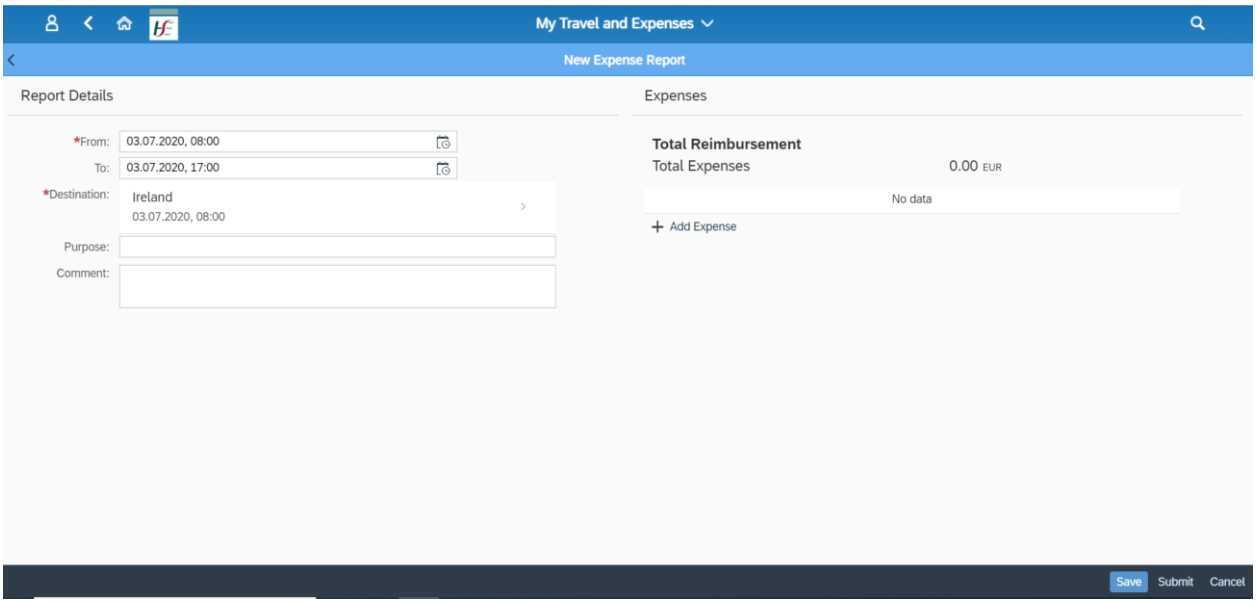
Submitting a Claim for One Day only

1. Enter Username and Password and click log on.
2. Click the "My Travel & Expenses" tile.



Note: If there is an "Error" showing on My Travel and Expenses this indicates that Travel Privileges need to be set up and approved before you can make a claim.

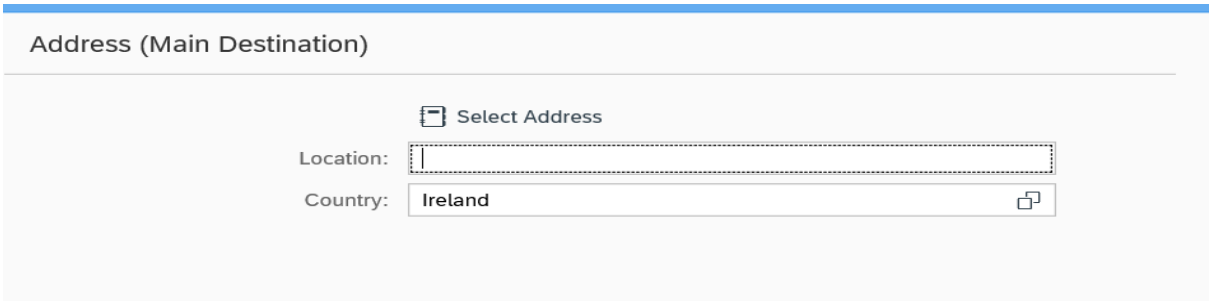
3. To create a new travel claim select + at the end of screen – the Create New Travel Expense screen opens and defaults to current date;



4. Select the “From” and “To” Dates by picking , choose appropriate date and press OK.

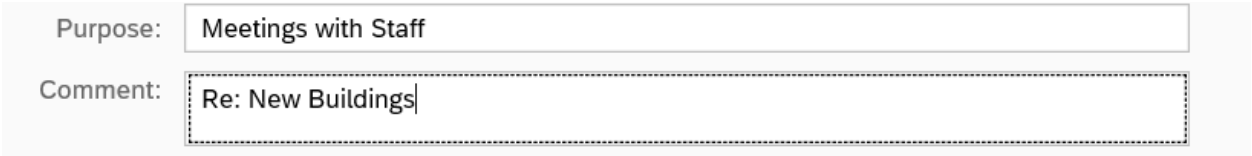
5. Select Destination and record the “Location” field enter where you travelled to;

**Date updates once you enter the Destination Details*



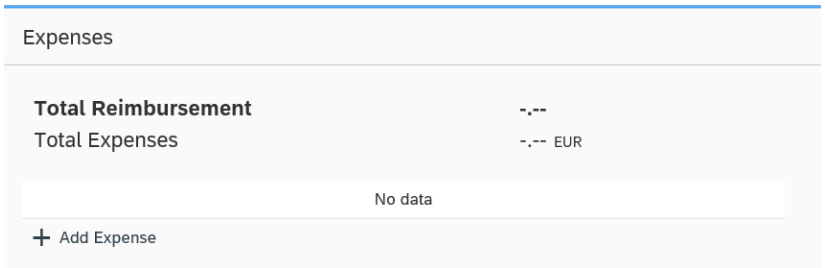
6. Select “ ” at the top of the screen to exit this screen.

7. The reason for travelling should be populated in the “Purpose” field and “Comments” may also be added (on the main screen).

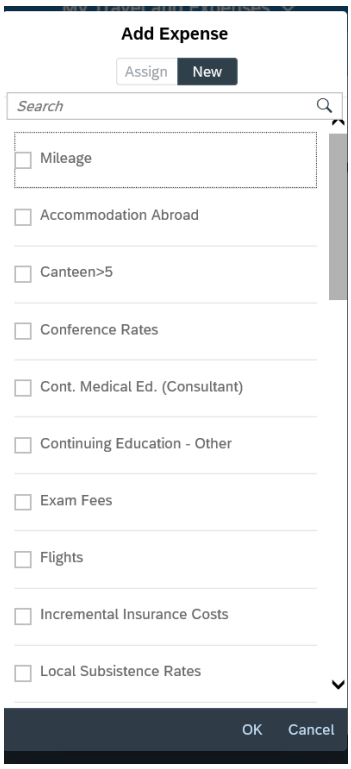


8. To add expenses select

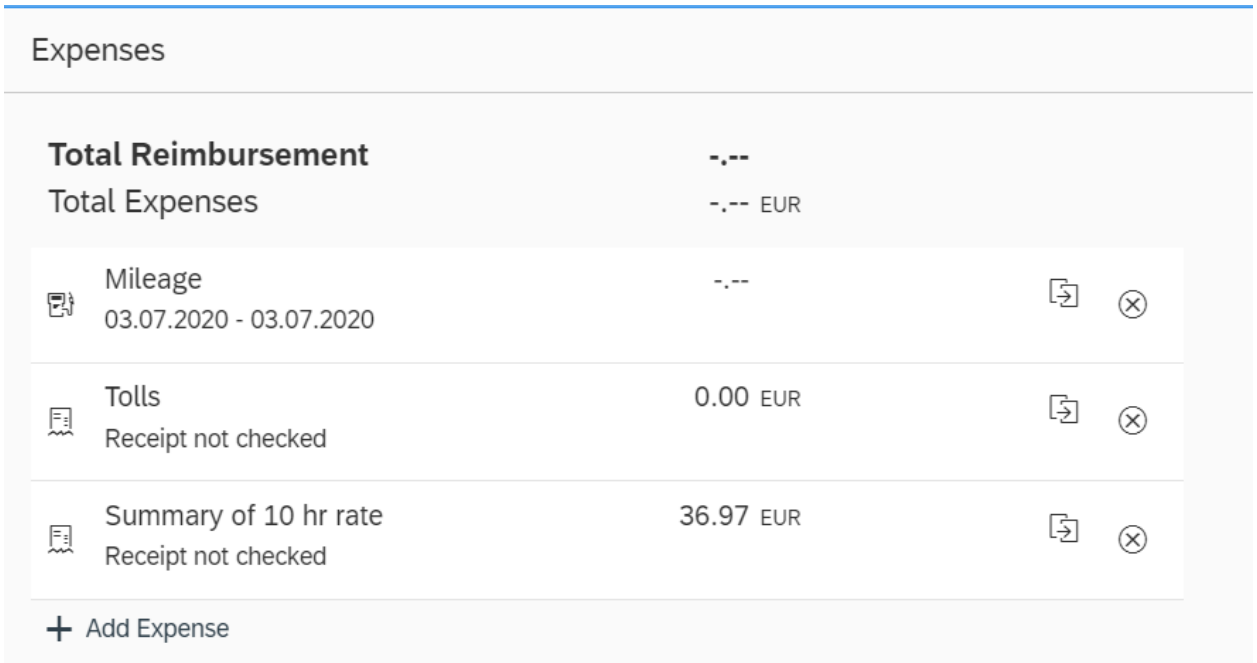
to the right of the screen.



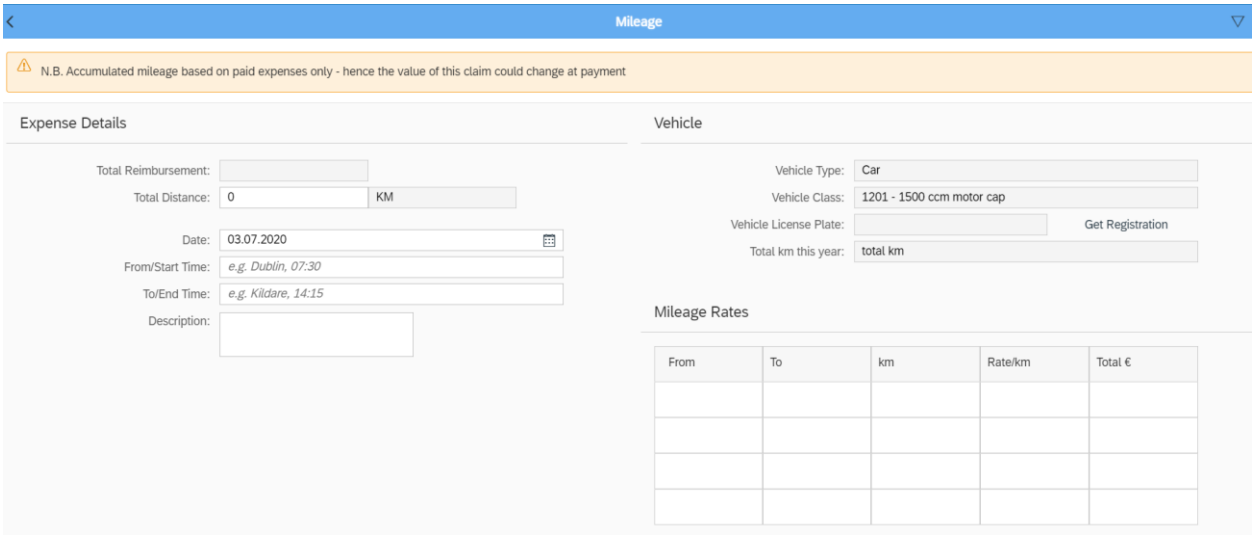
9. This presents a list of all expense types – scroll through the list selecting the relevant expenses by ticking the box next to the expense type you wish to choose;

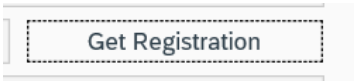


10. The expenses selected are presented in a list for update;

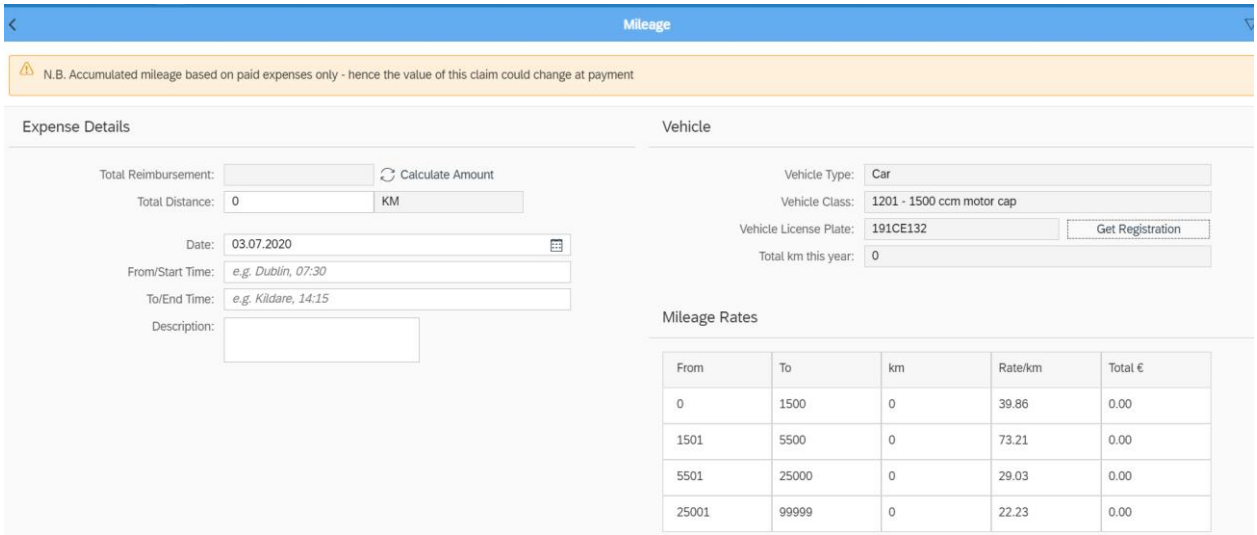


11. To enter Mileage: Click on Mileage from the list – the following screen presents;



12. Select the 

button to populate the Vehicle Details, Total KM this year and the Mileage Rates (shown below).



13. Enter the number of kilometres travelled in the Total Distance field and select "Calculate Amount", populate the From/Start Time, To/End Time and Description.

    Note: -

    Where there are a number of destinations/stops on one day it is possible to input these using the From/Start time, To/End Time and Description for the specific stops.

14. Press Save (bottom right of screen)

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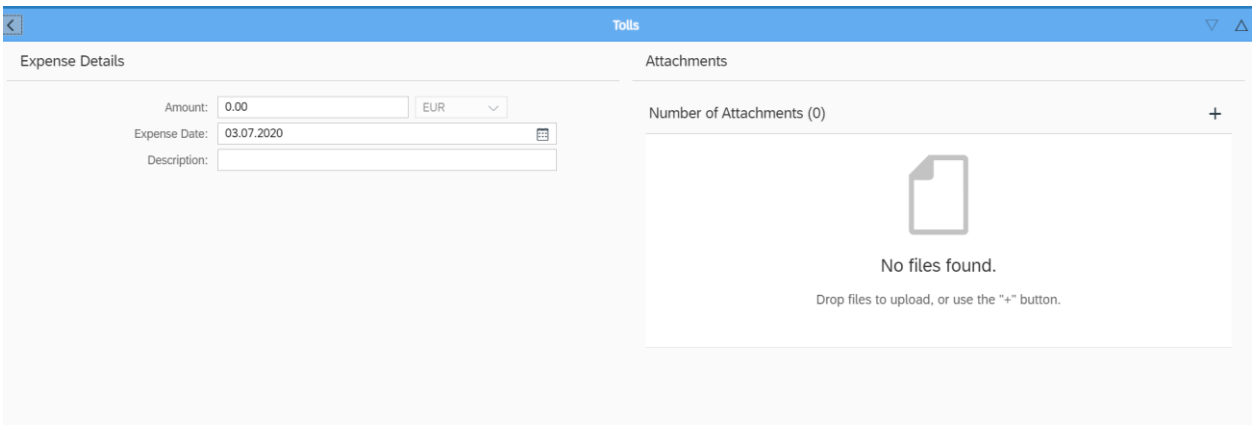
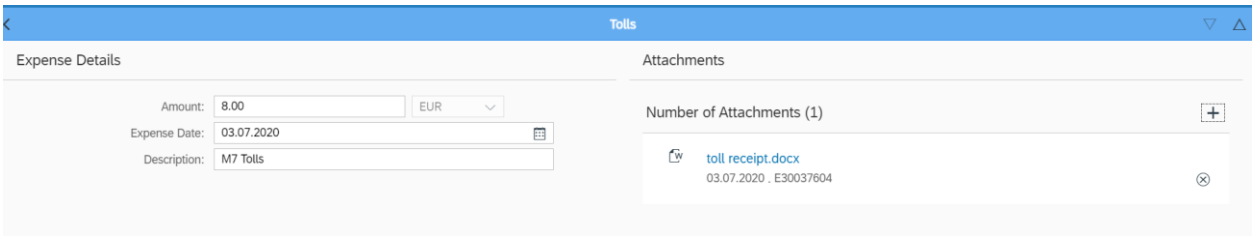
15. To update the next expense type, choose from the list – Tolls.

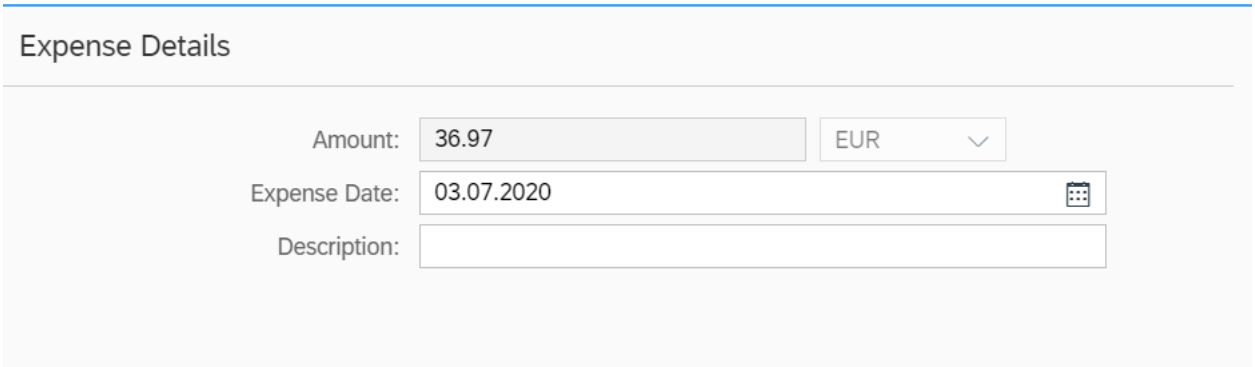


16. Enter the amount of the tolls/description (optional) and choose the + under Attachments to add receipt.



17. Press Save (bottom right of screen) Save.

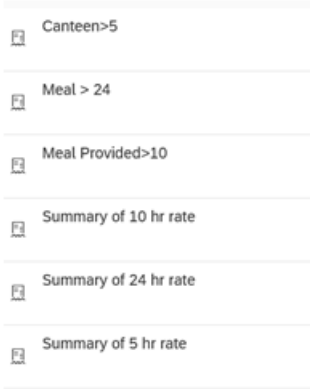
18. To update the next expense type, choose from the list – Summary of 10 hr rate.



19. The amount defaults, a description can be added (optional).

20. Press Save (bottom right of screen) Save.

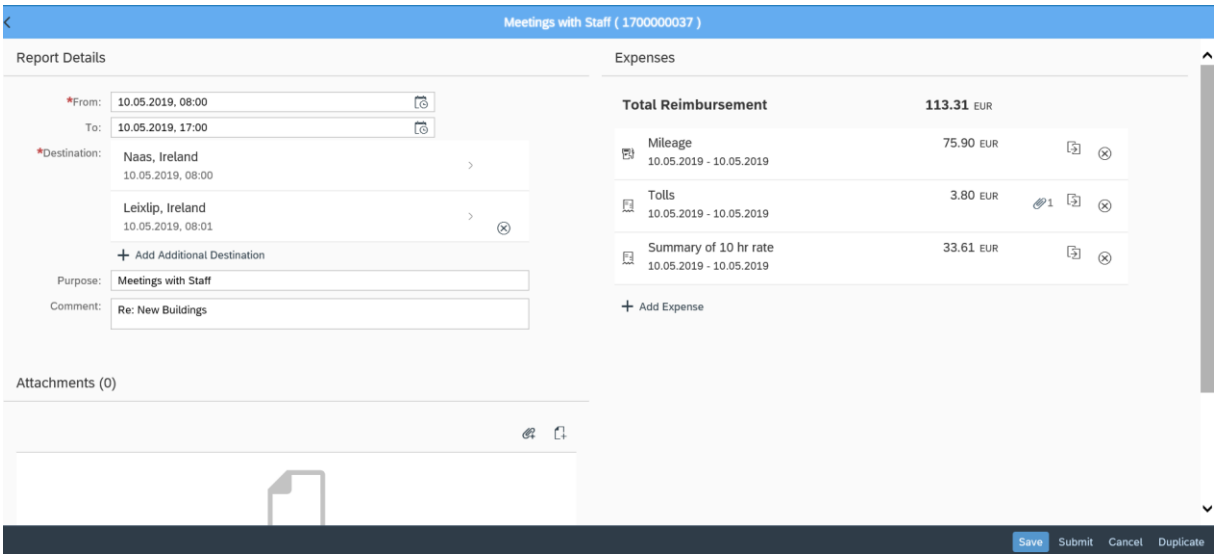
21. *The following expenses have a default value: (as per HSE Travel Rates)*



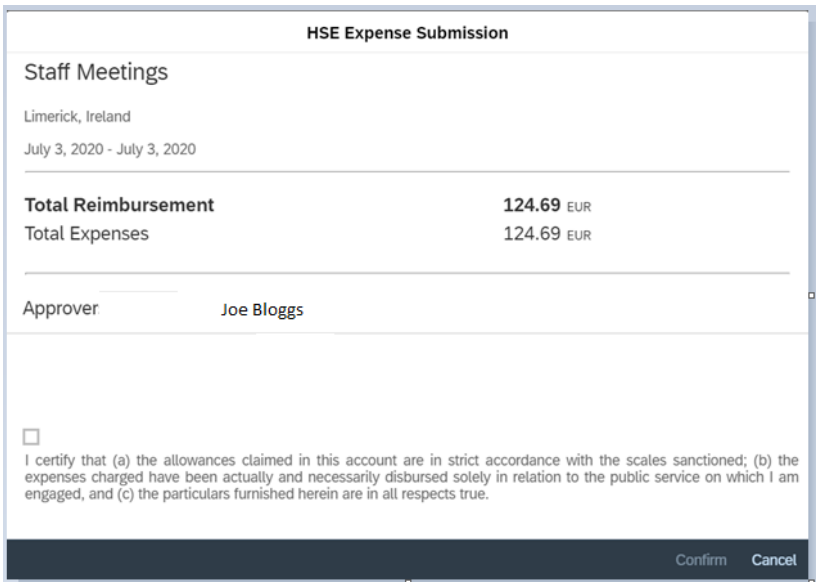
22. If any expenses have been added in error they can be deleted by selecting ⊗ from the list.

23. To save the claim select "Save" at the bottom of the main screen.

NB. Your claim has not been submitted to your manager for approval until the Submit icon is clicked.



24. Press the" Submit" button to send your claim to manager for approval and the following dialog box presents;



25. Check that your approver is correct, tick the box and select “Confirm”

26. Your Travel & Expenses have now been submitted to your manager for approval.

Info: The Travel and Expense Claims will have the following status:-

Open: Saved Only (this has NOT been submitted to your Manager)

Submitted: Submitted for approval to Manager

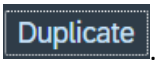
Approved: Approved by Manager

Reimbursed: Paid

27. To exit Travel and Expenses choose the Back arrow or Home Button .

<u>Duplicate Existing Trip</u>

Where a trip/journey is a regular occurrence – it is possible to duplicate this trip and update it with new dates.

Click on the relevant trip on the panel on the left and click on 

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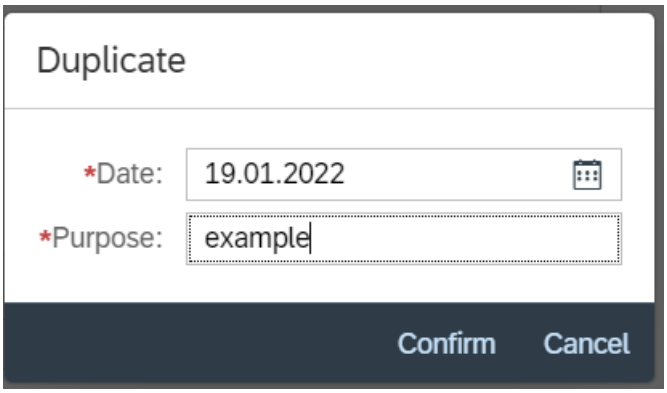
A screen will pop up with the current date.

Amend the date to the necessary trip date, update the Purpose and click on Confirm.



Review your Travel Claim/Trip and ensure that all necessary fields are updated, save and submit for approval.

Info: The Travel and Expense Claims will have the following status:-

Open: Saved Only (this has NOT been submitted to your Manager)

Submitted: Submitted for approval to Manager

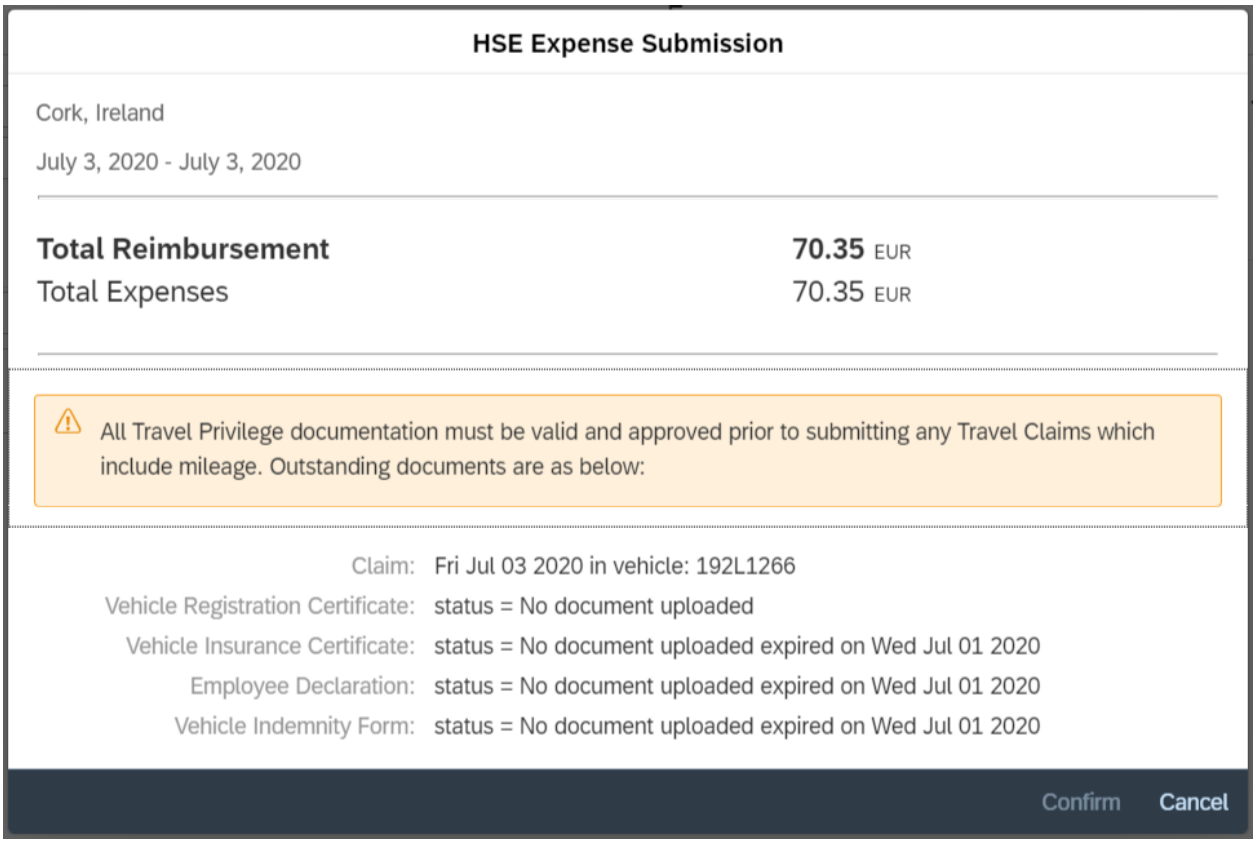
Approved: Approved by Manager

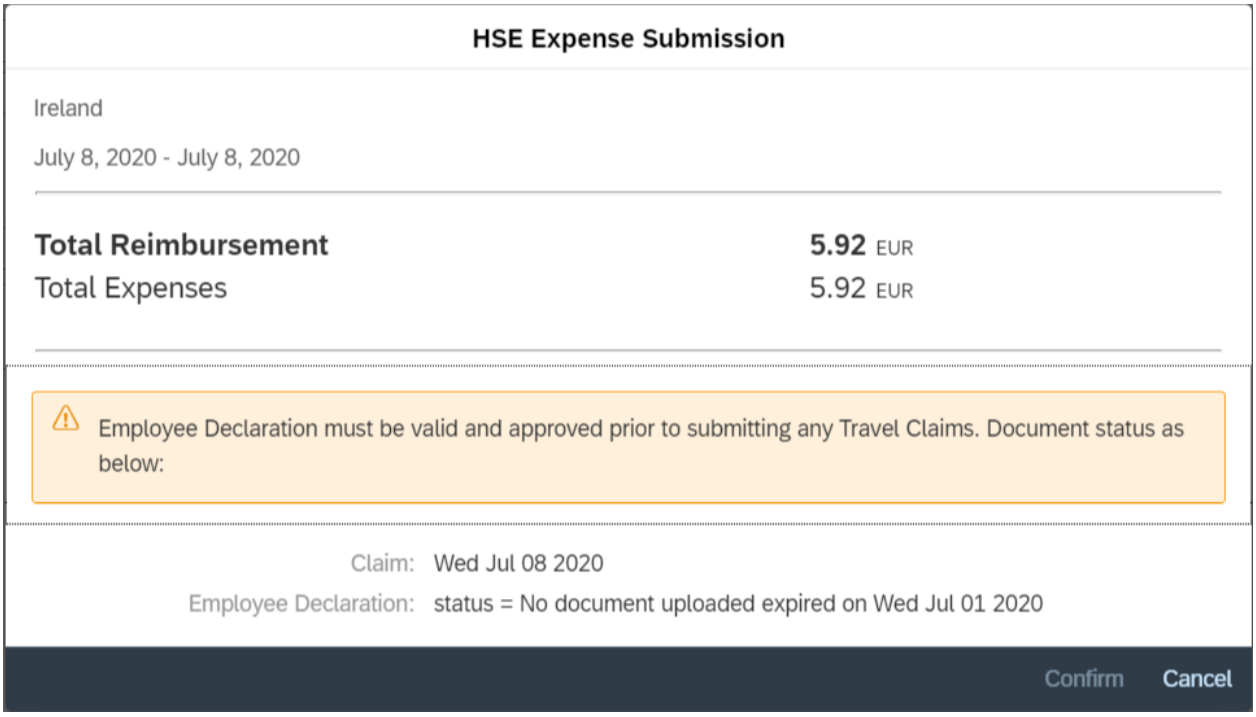
Reimbursed: Paid

Errors/Warning which may appear while inputting My Travel & Expenses

1. **Trying to submit a claim without the relevant approved documents in My Travel Privileges**

A pop message will present details of the required documents - No Vehicle requires Employee Declaration only, Vehicle requires the following Vehicle Registration, Insurance, Employee Declaration and Indemnity

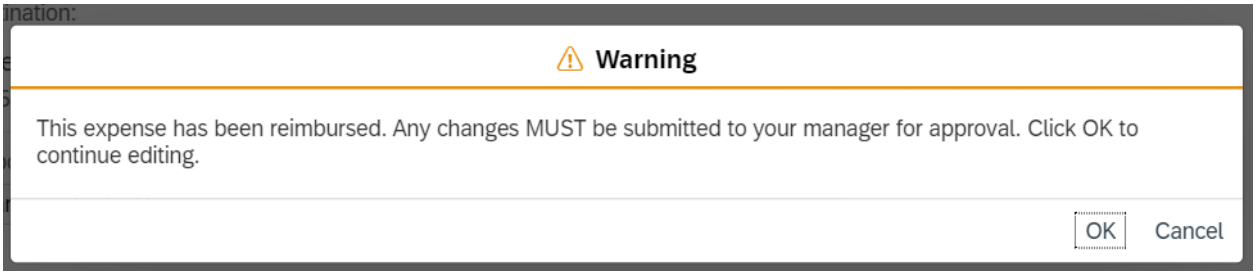




You cannot submit a claim until these documents are updated and approved by your Manager. You can save your travel claim and come back to it when Travel Privileges is corrected.

2. **Editing a Claim which has already been Reimbursed**

When you choose Edit and a Claim has already been Reimbursed/Paid the following warning presents;



Claims should only be Edited if updates are necessary and if updates are made the claim must be Re-submitted to your Manager for review/approval.