My Travel & Expenses

1. Enter Username and Password and click log on.
2. Click the "My Travel & Expenses" tile.
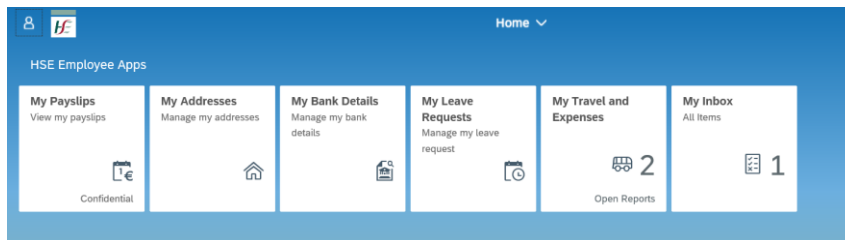
Note: If there is an Error showing on My Travel and Expenses this indicates that Travel Privileges have yet to be set up on your record. It will be necessary to have these updated before a travel claim is created.
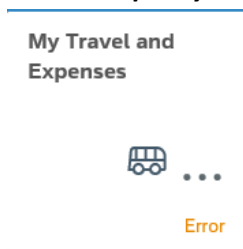
3. To create a new travel claim select at the end of screen (previous claims can be seen on the left of the screen).

4. The Create New Travel Expense screen opens (it defaults to the current date);

5. Select the "From" Date by picking ,choose appropriate date and press OK.

The "To" date updates to the same date as "From" (if it should be changed, it can be updated in the same way as the "From" date).

6. Select Destination and record the "Location" field enter where you travelled to;

7. Select " < " at the top of the screen to exit this screen.

*Destination: Naas, Ireland
              10.05.2019, 08:00   >

The date updates to the date of claim when details are entered and screen is exited.

8. You can add additional destinations if relevant by selecting the "Add Additional Destination" button (this can be used if you attend more than one location on a day).

+ Add Additional Destination

Select Address
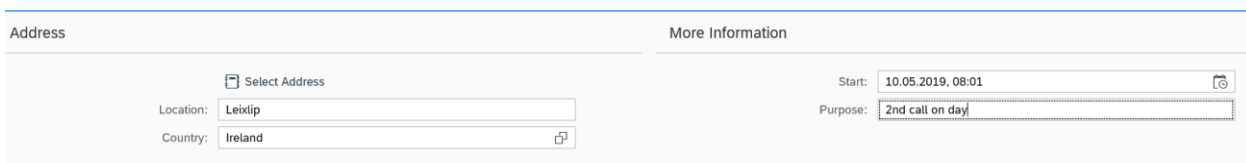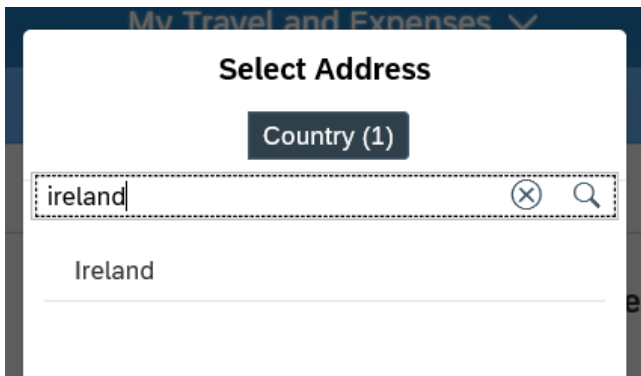
Country (206)

Search

Afghanistan

Albania

Algeria

Andorra

Angola

Antarctic

Antigua/Barbuda

Argentina

Armenia

Aruba

Australia

Austria

Azerbaijan
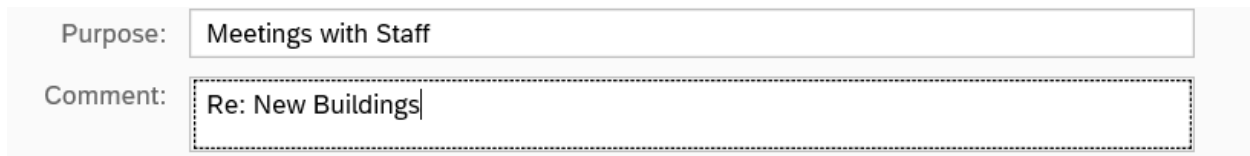
Bahamas

Bahrain

Bangladesh

Barbados

Cancel

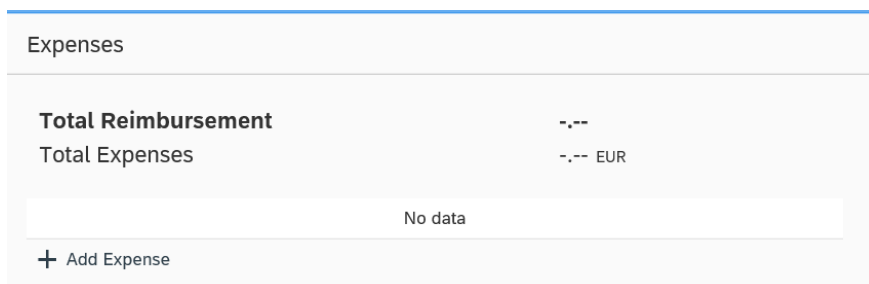9. Select appropriate country from the list – you can search for "Ireland" in the Search box (shown below).

10. Select " < " at the top of the screen to exit this screen.

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

12. To add expenses select "Add Expense" to the right of the screen.

13. 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;

Add Expense

Assign | New

Search 🔍

☐ Mileage

☐ Accommodation Abroad

☐ Canteen>5

☐ Conference Rates

☐ Cont. Medical Ed. (Consultant)

☐ Continuing Education - Other

☐ Exam Fees

☐ Flights

☐ Incremental Insurance Costs

☐ Local Subsistence Rates

OK   Cancel

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

Total Reimbursement   ↻ Calculate Amount

	Mileage 10.05.2019 - 10.05.2019	-.-- EUR	⤴	⊗
	Tolls Receipt not checked	0.00 EUR	⤴	⊗
	Summary of 10 hr rate 10.05.2019 - 10.05.2019	33.61 EUR	⤴	⊗

+ Add Expense

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

16. Select the

Get Registration

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

17. Enter the number of kilometres travelled in the Total Distance field and select "Calculate Amount".

18. Press Save (bottom right of screen) **Save** .
19. To update the next expense type, choose from the list – Tolls.

Tolls		▽ △
Expense Details		**Attachments**
Amount: 0.00 EUR ⌄		Number of Attachments (0) +
Expense Date: 10.05.2019 📅		
Description:		No files found.
		Drop files to upload, or use the "+" button.

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

Tolls		▽ △
Expense Details		**Attachments**
Amount: 0.00 EUR ⌄		Number of Attachments (1) ⊞
Expense Date: 10.05.2019 📅		📄 toll receipt.docx
Description:		18.05.2019 , E30920320 ⊗

21. Press Save (bottom right of screen).
22. To update the next expense type, choose from the list – Summary of 10 hr rate.

Summary of 10 hr rate
Expense Details
Amount: 33.61 EUR ⌄
Expense Date: 10.05.2019 📅
Description:

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

24. The following expenses have a default value:

🧾	Canteen>5	5.92 EUR
🧾	Meal > 24	132.99 EUR
🧾	Meal Provided>10	19.60 EUR
🧾	Summary of 10 hr rate	33.61 EUR
🧾	Summary of 24 hr rate	147.00 EUR
🧾	Summary of 5 hr rate	14.01 EUR

25. Press Save (bottom right of screen).

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

27. 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.

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

29. Tick the box and select "Confirm"
30. 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

Submitted: Submitted for approval to Manager

Approved: Approved by Manager

Reimbursed: Paid

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