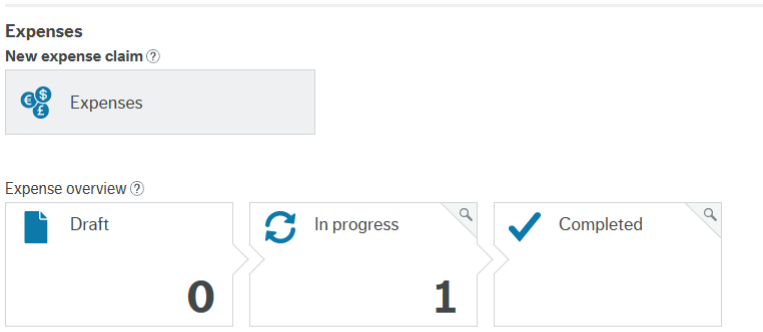
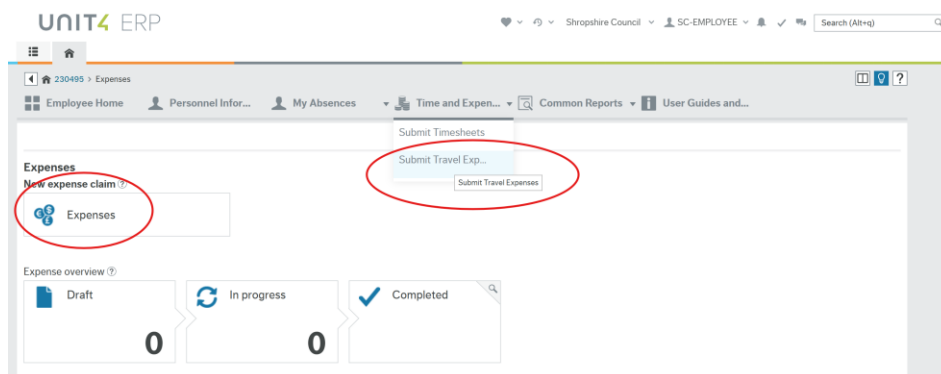


How to claim expenses (including mileage) in the ERP

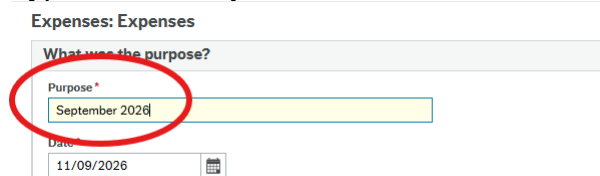
		Last Updated
1	Scope: This guidance is to show you how to claim expenses (including mileage) in the ERP as well as how to check and approve as the authorising manager.	11.09.2026
2	Introduction: In certain circumstances where it has been agreed that a member of staff needs to claim expenses including	11.09.2026
3	Navigate to Home Dashboard > Time and Expenses > Submit Travel Expenses or Main Menu > Your employment > Expenses	11.09.2026
4	Step by step process	
4.1	<u>Completing an Expense Claim</u> Navigate to Submit Travel Expenses from the Home Dashboard. In the Expense overview, to continue completing a saved expense claim, click on the Draft box; to view, amend or delete an expense claim that has not yet been approved, click on the In Progress box; to view an expense claim that has been approved, click on the Completed box. 	02.10.2026



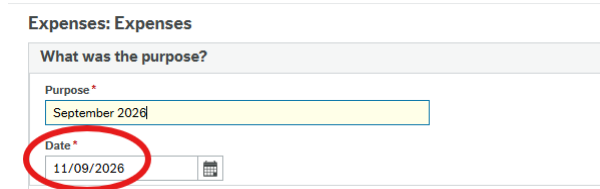
Click on **New expense claim** to start a new claim.



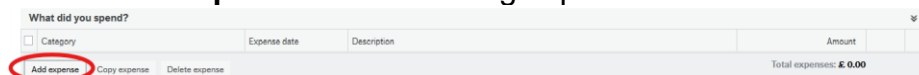
Type in the **Purpose** which is the month and year of the claim.



The **Date** needs to be the date of the first journey that will be on the claim.



Select **Add expense** to start adding expense lines.



In **Category**, select the type of expense (i.e. **Car Mileage**) by either clicking on the arrow or pressing SPACEBAR to bring up a list of options and then clicking on the correct type.

What did you spend?

☐ Category

Accommodation

Adults with Learning Difficulties Lunches

Books

Breakfast

Bus

Car Mileage

Car Mileage - Full Electric

Car Mileage (DO NOT USE)

Councillor Miles

Councillor Miles - Full Electric

Councillor Passenger Miles (Car)

Cycle Mileage

Evening Meal

The **Expense Date** needs to be the date of the expense on this line (i.e. the date of the journey.)

Expense date

The **Description** for mileage claims, type in details of where you started the journey, with postcode to and from, and the reason for the journey

Description

For all other claims, type in details for the claim (i.e. Drinks from Canteen for Training Session.)

The **Quantity** for mileage is the number of miles correlating to the journey on the expense line and will be greyed out for all other expense claims. The Amount will be calculated and greyed out for mileage claims and for all other claims, you need to add the cost of the claim corresponding to the attached receipt.

Quantity	Amount
50.00	27.50

Please refer to the policy for advice on what and how much can be claimed.

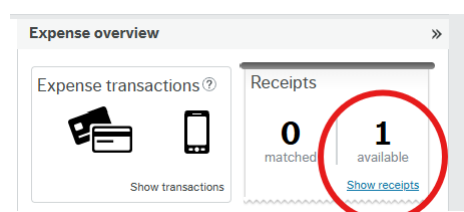
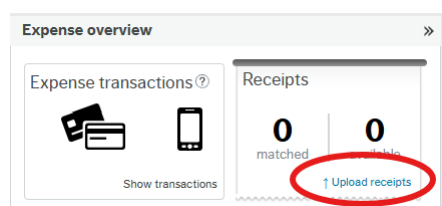


4.
2

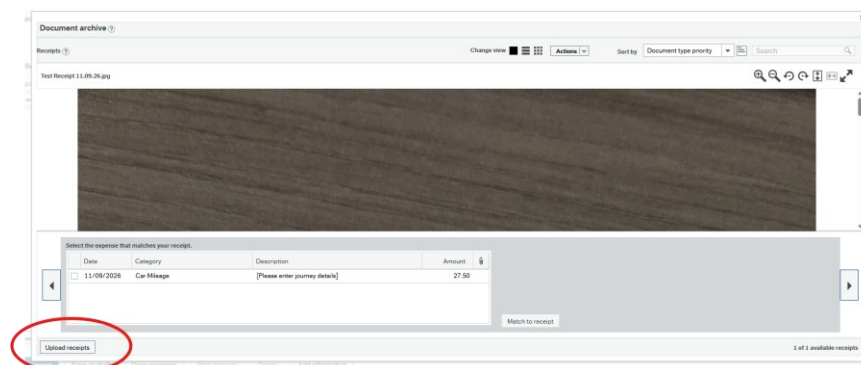
Uploading Receipts

Make sure your receipts are already saved on your OneDrive or device and saved with an identifiable name to make matching easier before starting your claim.

Under **Expense overview** and **Receipts**, click **Upload receipts** (if there aren't any receipts uploaded into the ERP yet) or **Show receipts** (if there are already receipts uploaded into the ERP.)

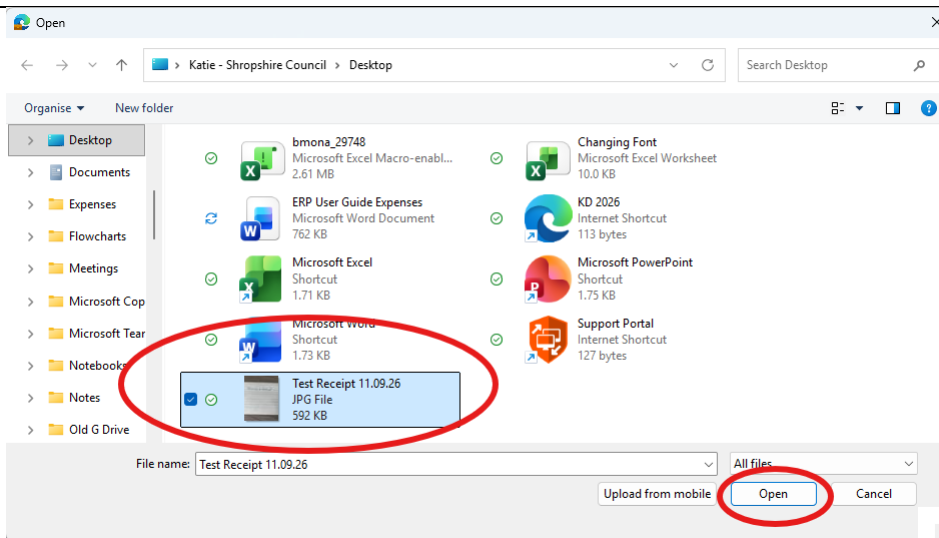


If you need to upload more receipts after selecting **Show receipts**, select **Upload receipts** in the bottom left.



When the **Receipts** box opens, click on the **+** to open the document folder on your device or click on the **Upload receipts** box at the bottom left.

Select the relevant receipt (that has previously been saved onto your device) and click **Open**.



This receipt is now uploaded into the ERP and ready to be attached to corresponding line in the expense claim.

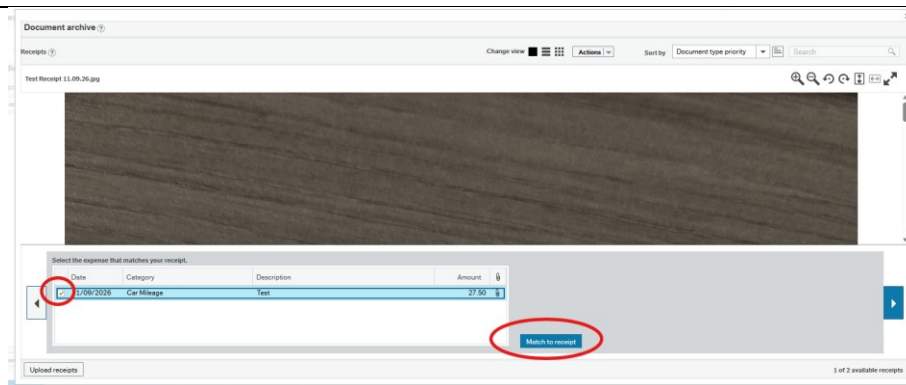


4. Matching Receipts

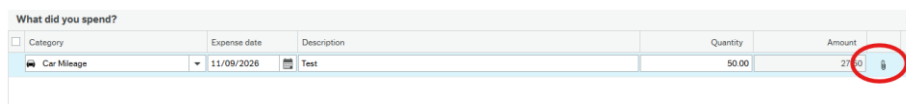
3

Once you have the relevant receipts available in the ERP, you need to match them to the corresponding line in your claim.

Under **Expense Overview** and **Receipts**, click **Show receipts** and then select the expense line that corresponds to the receipt showing by ticking the small box, then click **Match to receipt**.



Close the **Receipts** box and if there is a paperclip symbol, the receipt has been matched to the line.



You can now add further expenses as above, **Save as draft** to come back later and add more or **Send for approval** to submit the claim.

After you click **Send for approval**, the claim will workflow to be approved by the Authorising Officer (normally the employee's line manager, service manager or head of service) and, if approved, workflow to Payroll for payment. If a task is not actioned within 5 days, it will workflow to the next Authorising Manager for action and so on.

If there are any concerns with the claim, the Officer will enter a comment in the ERP and reject the claim. Claims must be submitted within 3 months, otherwise they should be rejected.

The claim will workflow back to the employee as an **Amend Expense Claim** task for them to review the comments and make the necessary adjustments and resubmit or withdraw the claim.

4.
4

Checking and Approving Expense Claims

Check the **Resource** and that the **Purpose** is the month and year corresponding to the claim.

Comments can be added here in the **Workflow Log** and need to be included when rejecting any tasks.

Travel expenses approval

General
Name: Simon Test
Transaction number: 4097906
Comment:

Resource ID: 230495
Purpose:

Workflow log (row 1)
11/09/2026 11:50 Simon Test (230495) - Distributed

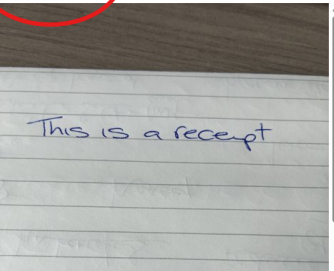
Scroll right and down or zoom out to check that the **Expense Type**, **Position title** and **Date** are correct and that the **Description** is completed fully. If the description text exceeds what you can see on the screen, you can click across with the right arrow key to see the full details.

For mileage claims, this needs to include where the journey started including the postcode, the destination including the postcode, where the journey ended including the post code and the reason for the journey. If these aren't in the claim, it needs to be rejected.

You will need to check that the claim is completed in line with the Travel and Expenses policy (for example that the mileage figures are correct (based on the post codes stated in the claim), the journey or expense hasn't been previously paid, that the claim is less than 3 months old, and that VAT fuel receipt has been attached.) All expense claims should have a valid receipt attached. Only all electric cars don't require a VAT receipt to be attached.

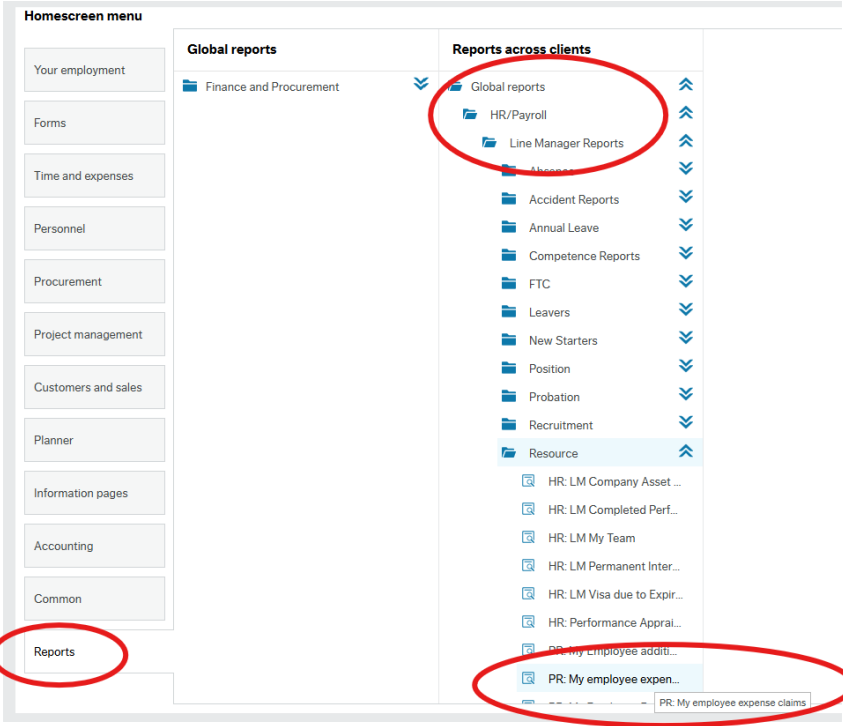
Map	Expense type	Description	No/Base	Rate	Amount	Receipt
	Car Mileage	Test	50.0000	0.5500	27.50	☒
Σ					27.50	

Expense details
Expense type: Car Mileage
Date: 11/09/2026
Position: Tester
Description: Test
No/Base: 50.0000
Rate: 0.5500
P2 Constant: 0.0000
P3 Constant: 0.2500
P4 Constant: 0.0000
Amount: 27.50
GL Analysis
Account: A33010
Costc: 11166
Tax code: 0
VAT Outside of Scope 0%
Navigation:

Image


You can view the receipt image by clicking on the line it is attached to, scrolling down and across. You can also view it in the document library (by clicking on the paperclip) or download a copy by clicking on Download document.

The fuel receipt must be a valid receipt where the date and value relate to the claim (predates the first journey in the claim and covers the amount of fuel used.)

4. 5	One receipt attached to the claim can cover more than one expense line as long it is greater than the amount of fuel used in the claim. Select Approve after checking all the request details to confirm and action. Select Reject after checking all the request details and finding reasons to refuse to send back to the requester to amend or delete. <u>Expense Reports</u> To check your employees previous expense claim, navigate to Reports > Global reports > HR/Payroll > Line Manager Reports > Resource > My employee expense claims 	
5	Video Links How to make an expense claim Uploading and matching receipts in an expense claim Checking, Approving and Rejecting Expense Claims in the ERP How to use Reports in the ERP	11.09.2026