

How to submit an expense claim when working from home

Please enter your expense claim using the web version of Business World (Agresso).

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 authorisers of your 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 maximum file size will be 10000KB and the 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.

Entering a claim

Open a browser and log onto Business World(Agresso)

Click on **Enter Expense Claim** (staff or student)

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

Expenses > Expenses 3/19/2020

Expenses: Enter an Expense Claim (Staff)

What was the purpose?

Purpose of Expenditure*

Date*

3/19/2020

Cost categories

Project code

Apply to all ?

What did you spend?

Category	Expense d...	Description	Amount

Add expense Copy expense Delete expense last write-up: £ 0.00

Expense overview

Receipts

0 matched | 0 available

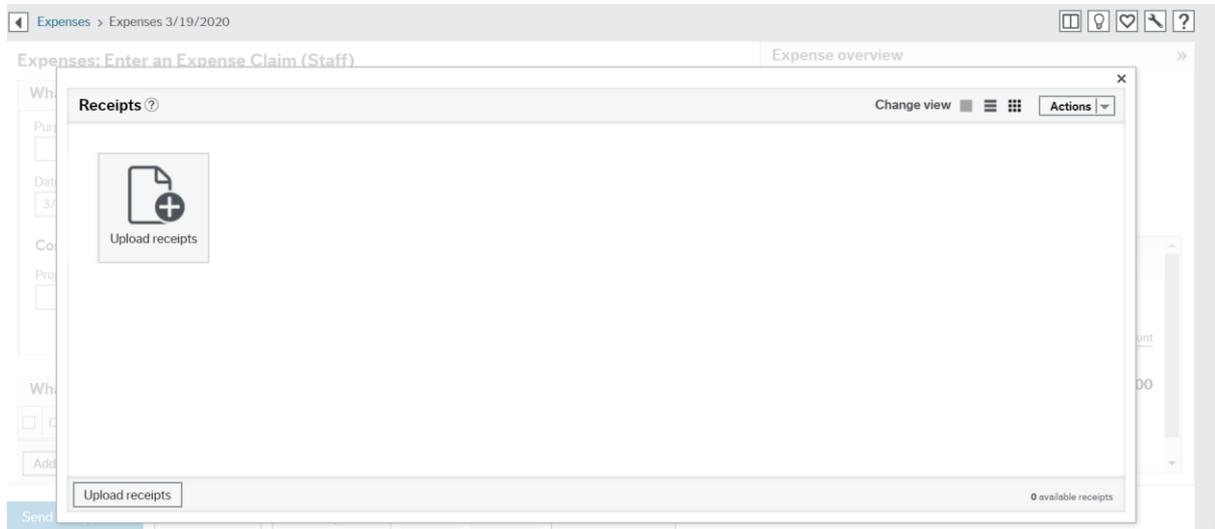
Upload receipts

Expenses

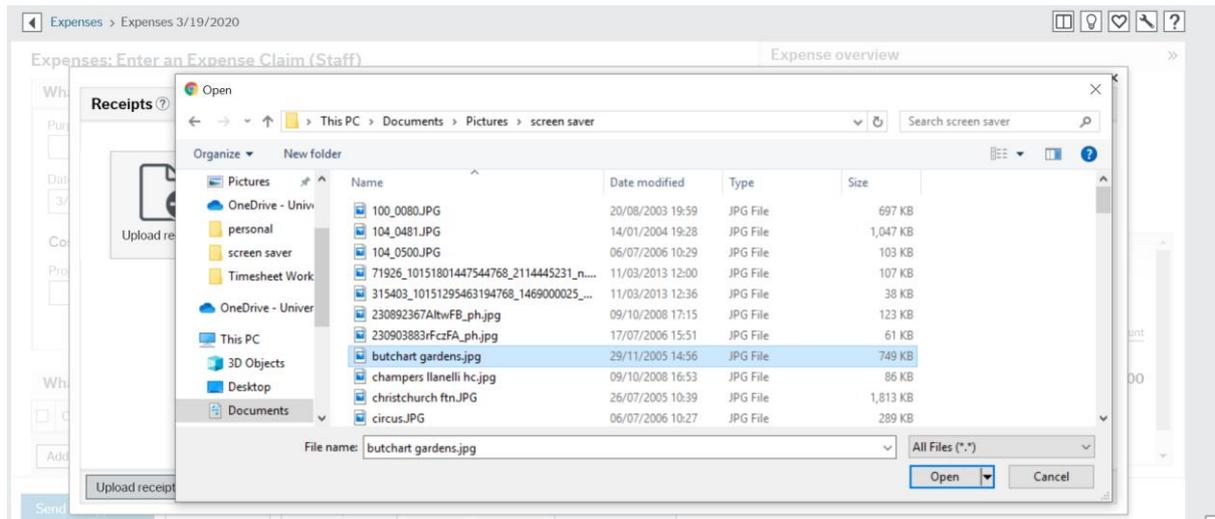
3/19/2020	Type	Amount
Total		£ 0.00

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

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



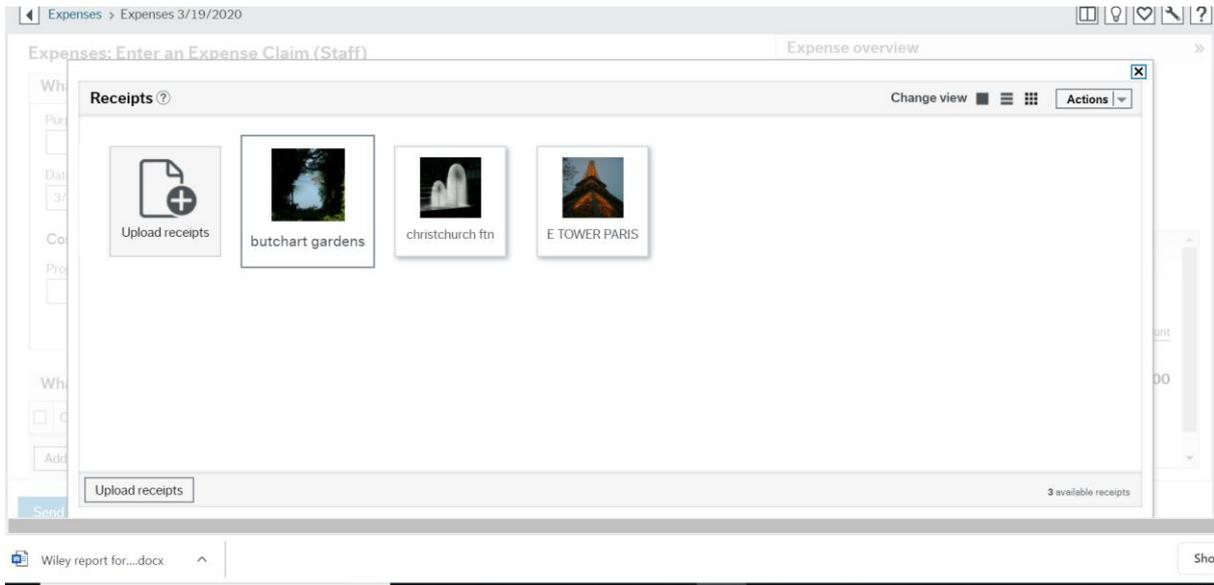
Click on **Upload receipts**. This will open another pop up screen where you can search your device for files



Click on the file you wish to add, this will appear in the File name at the bottom and **Open**

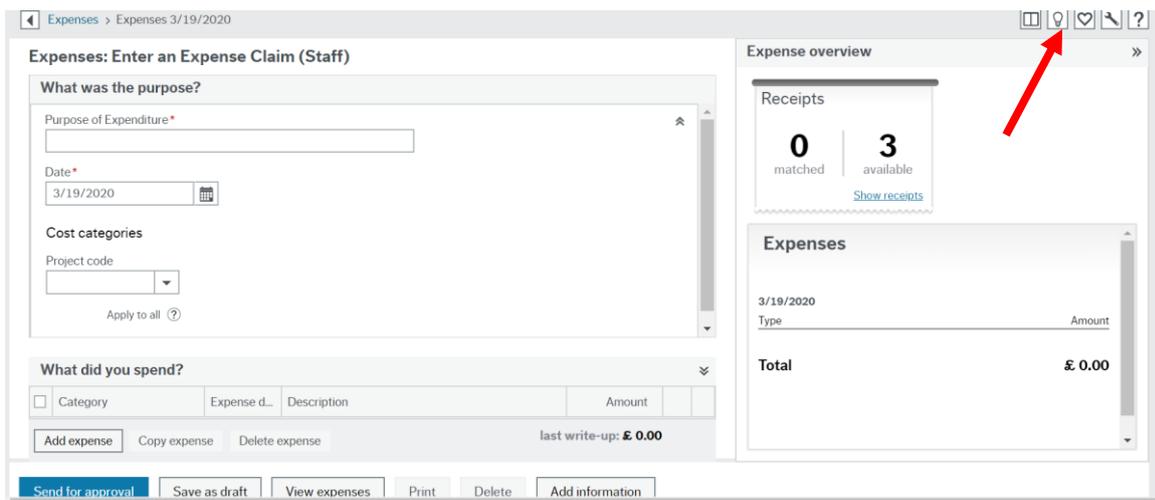
The file will be loaded onto the screen as an available receipt

Repeat this step for all files you wish to load



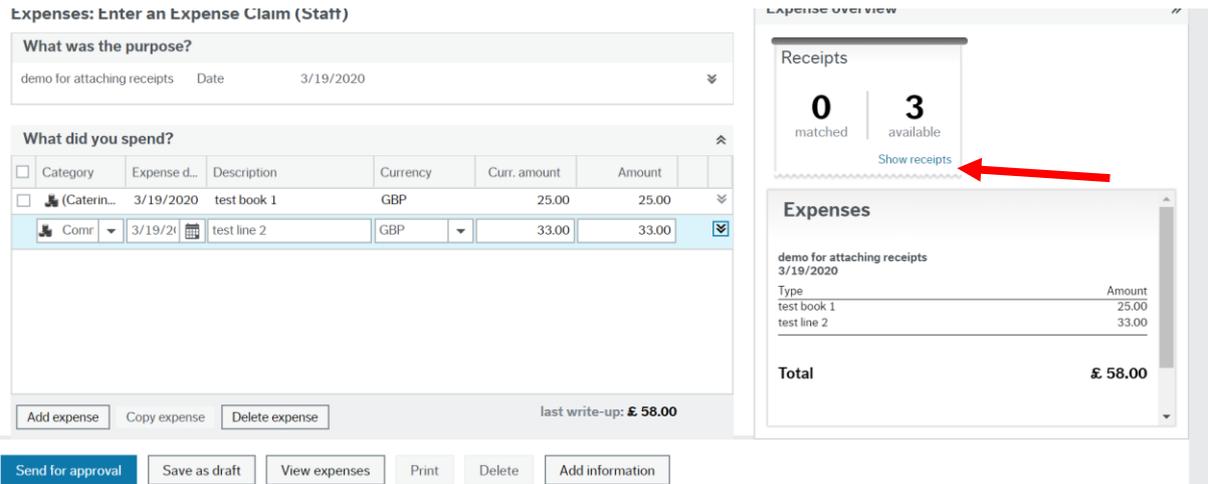
Click on the **X** (above Actions) to close the pop up screen

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

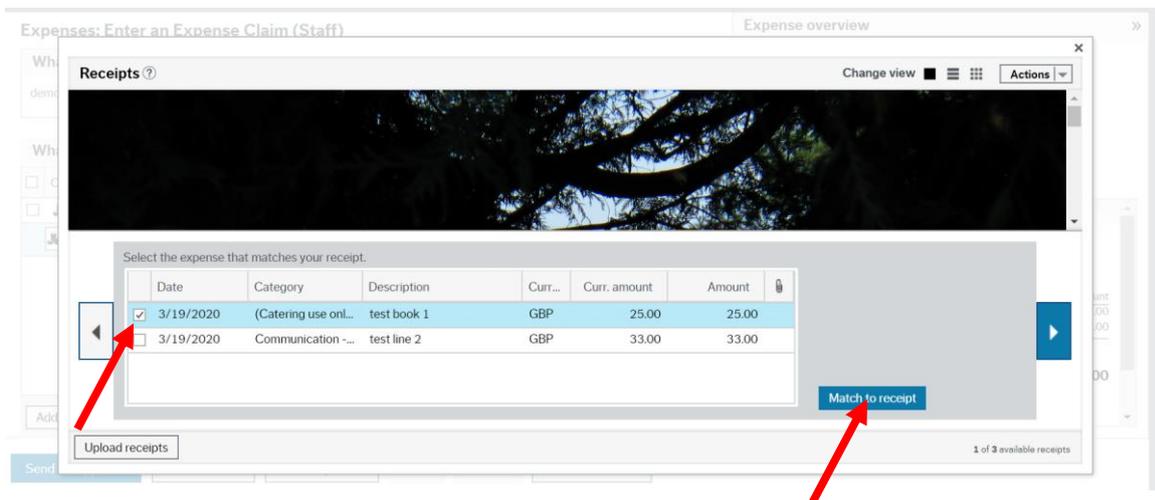


Enter your expense claim. Guidance on how to complete an expense claim is available within Business World (Agresso) as a Knowly (click on the lightbulb icon) or go to <http://www.bath.ac.uk/agresso.bho/expenses/index.html>

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



A pop up screen will open



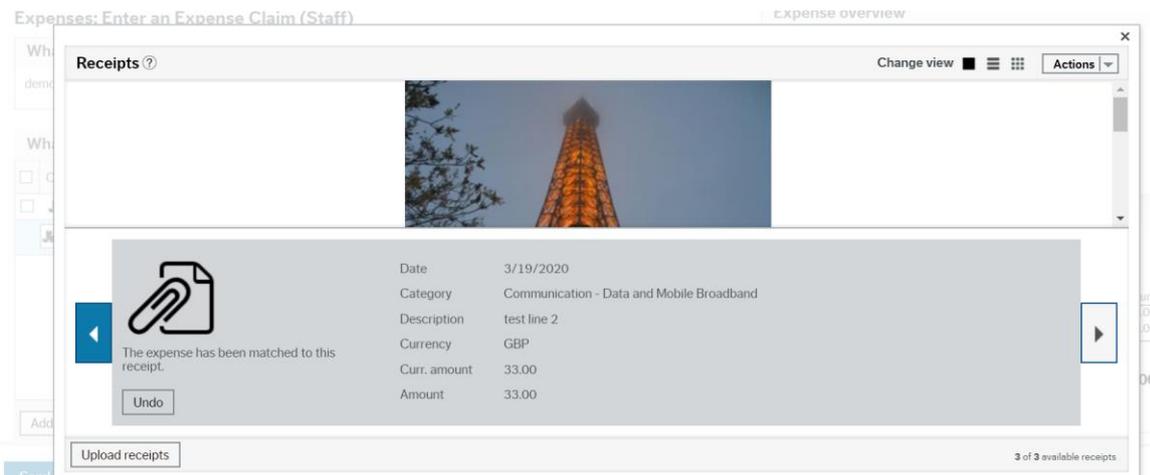
The first file will now be visible along with a box with the claim lines available to match that receipt to.

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

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
(Caterin...	3/19/2020	test book 1	GBP	25.00	25.00
Comr	3/19/2020	test line 2	GBP	33.00	33.00

last write-up: **£ 58.00**

Expense overview

Receipts
3 matched | 0 available
[Show receipts](#)

Expenses
demo for attaching receipts
3/19/2020

Type	Amount
test book 1	25.00
test line 2	33.00
Total	£ 58.00

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

Submit your claim by clicking on **Send for approval**.