



**Finance Transformer**  
**Digital Staff Expenses**  
**Approving Expense Claims Guide**

## Introduction

From 27 March 2020, staff across UCL will be able to follow a fully paperless process for the submission of expense claims in iExpenses. This enhancement will enable claims to be submitted and processed using receipt images only and will remove the need to submit paper receipts to Accounts Payable.

This guidance shows authorised signatories how to view digital receipt images and approve claims using the new functionality. Signatories can approve claims using an email notification or within the MyFinance system. Each option is covered in the guidance below.

Prior to approval, authorised signatories should personally review the receipt images and claim details. Approvers are expected to review claims promptly and consider the following before approving:

- The appropriateness and cost of the expenditure
- The expenses category chosen for each item
- The project code(s) charged
- Any policy violations (please see [UCL Expenses Policy](#))
- That receipts or receipt images correspond to the claim and constitute itemised receipts, not credit card slips/bank statements
- That items within the claim meet the terms of the research funder's terms and conditions (if related to sponsored research)

## Approval - Email Notification

When a claim is submitted, it is routed to the appropriate approver based on the project code charged and the amount of the claim. An email notification is sent to the relevant approver asking them to review the claim and associated receipt images.

1. Open email and review claim details. The receipt images will be attached to the email if applicable. It is marked whether a receipt image should be attached (for some categories receipts are not required, i.e. mileage claims).

Notification Detail.html  
752 bytes

06.03.20 - Breakfast at Conference ABC.jpg  
5 MB

27.02.20 - Train to Liverpool Conference ABC.jpg  
8 MB

**Information**  
This expense claim should have receipt images attached. Prior to approval, please view the receipts and ensure they correspond to the claim.

From: Ansell, James  
To: Morrissey, Eleanor  
Sent: 09-Mar-2020 11:54:33  
ID: 10329605

Person: Ansell, James  
Cost Center: A01  
Purpose: Conference in Liverpool  
Report Total: 140.30 GBP  
Employee Number: 2012889  
UPI: JANSE85

**Instructions**  
Please approve or reject this expense claim. Please provide a Note if you reject.

**Cash and Other Expenses: Business Expenses**

Details	Line	Date	Expense Type	Merchant Name	Reimbursable Amount (GBP)	Justification	Imaged Receipt Required	Attachments
	1	02-Feb-2020	Train Ticket - UK	West Coast	135.75	Travel to Liverpool	✓	
<b>Expense Allocations</b>								
	Project Number	Task Number	Award Number	Project Expenditure Organization	Cost Center	Amount		
	501903	100	156780	H90 Financial Analysis & Reporting	D39	135.75		
	2	03-Feb-2020	Meals - Breakfast UK (Subsistence)	Pret	4.55	Breakfast for Liverpool conference	✓	
<b>Expense Allocations</b>								
	Project Number	Task Number	Award Number	Project Expenditure Organization	Cost Center	Amount		
	501903	100	156780	H90 Financial Analysis & Reporting	D39	4.55		
	Total					140.30		

2. When the claim details and receipts have been reviewed, scroll down to bottom of email notification and choose action:
  - a. **Approve** – claim will be approved and paid following any necessary checks in Accounts Payable
  - b. **Reject** – claim will be rejected and a notification will be sent to the claimant informing them of this decision
  - c. **Request Information** – a request for further information will be sent via email to the claimant
  
3. To authorise the claim, click the **Approve** option. A new email is opened, click **Send**.

Approval Notes

Note	Author	Date	UCL Approval Group
No results found.			

Approvals History

Seq.	Date	Status	Performer	Approval Group	Comments
1	09-Mar-2020 11:54:32	Notified	Morrissey, Eleanor	UCL Authorised Signatories	

Related Applications

[Expense Report Details](#)

Please click on one of the following choices to automatically generate an E-mail response. Before sending the E-mail response to close this notification, ensure all response prompts include a desired response value within quotes.

Action: [Approve](#) [Reject](#) [Request Information](#)

Action Required: Expense UCLXEXP448263 for Ansell, James (140.30 GBP) - Message (HTML)

File Message Insert Options Format Text Review Tell me what you want to do...

Clipboard Basic Text Names Include Tags My Templates

To... ebsuatimap@ucl.ac.uk

Cc...

Bcc...

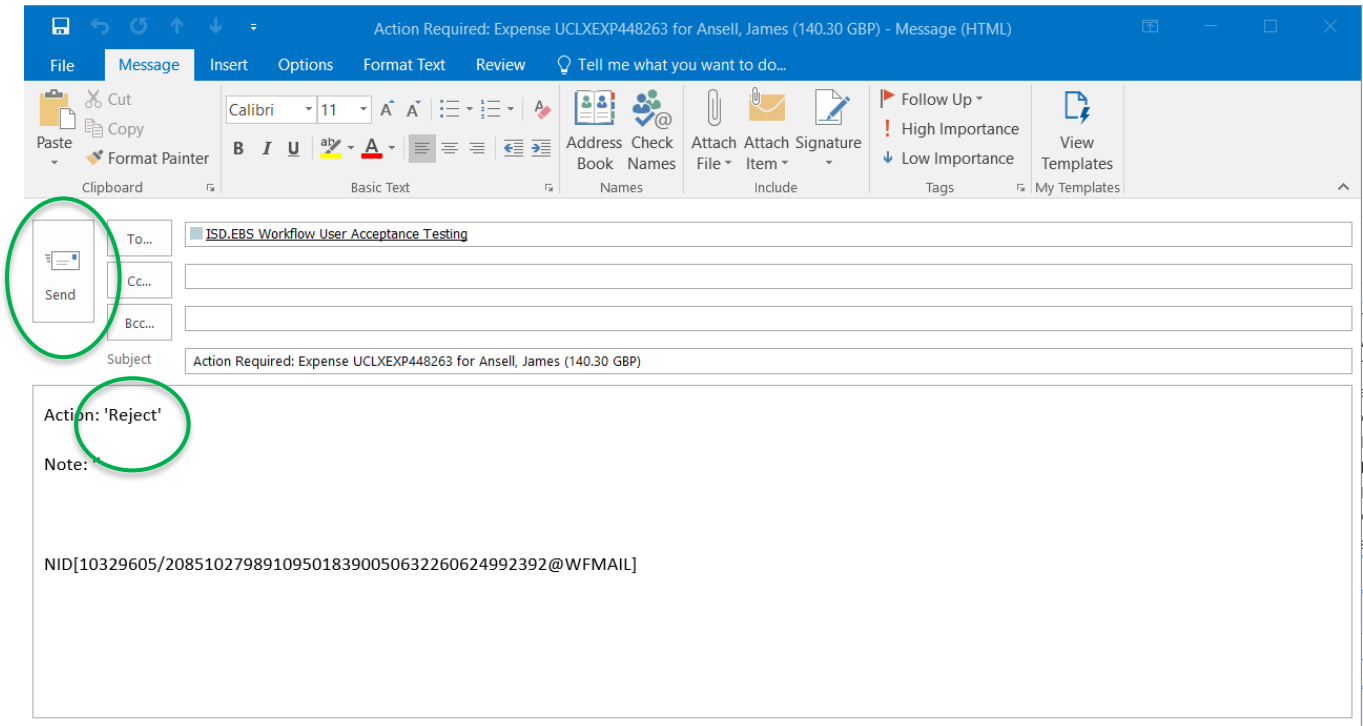
Subject Action Required: Expense UCLXEXP448263 for Ansell, James (140.30 GBP)

Action: 'Approve'

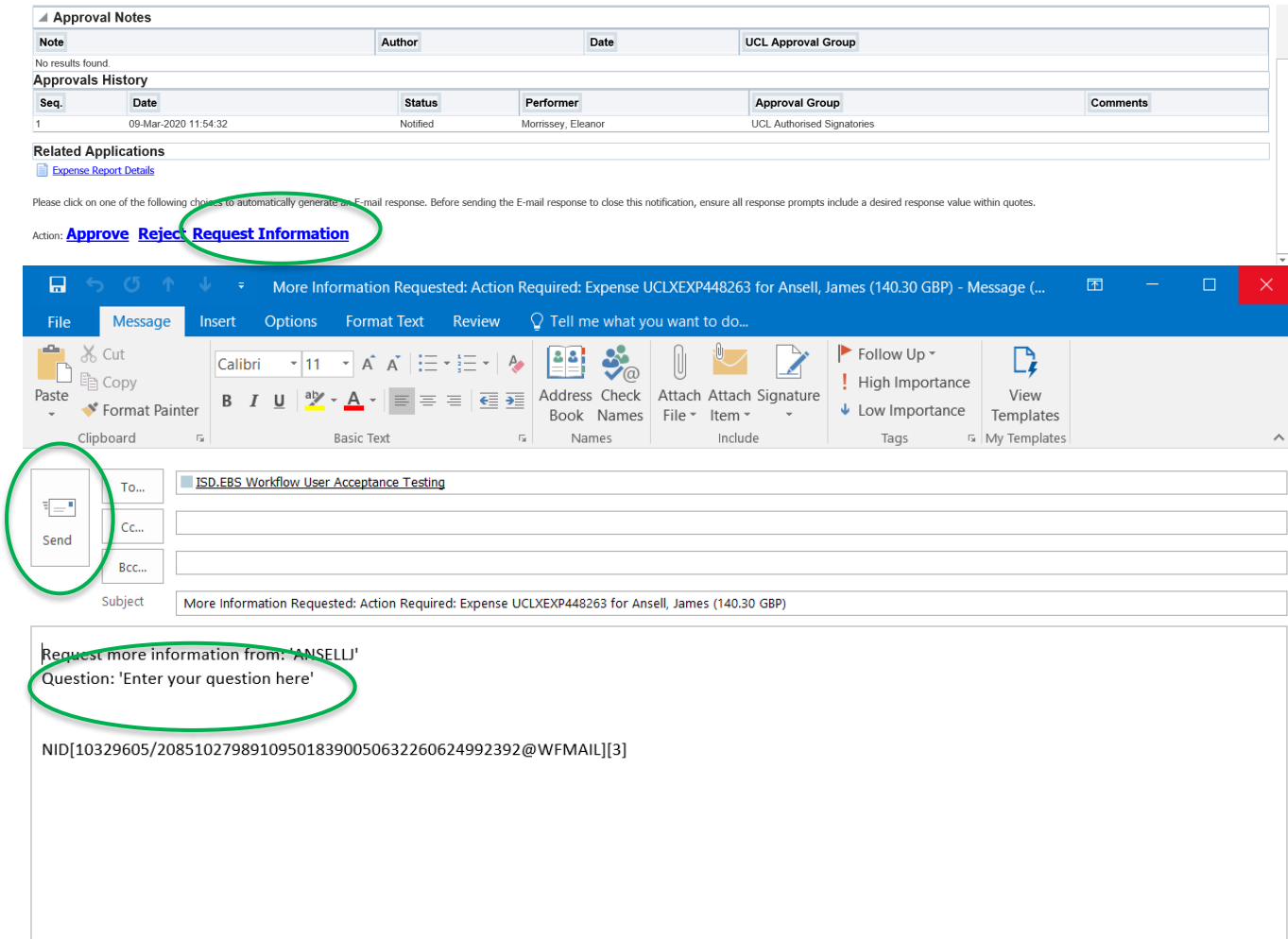
Note: ''

NID[10329605/208510279891095018390050632260624992392@WFMAIL]

4. To reject the claim, click the Reject option. A new email is opened, click **Send**.



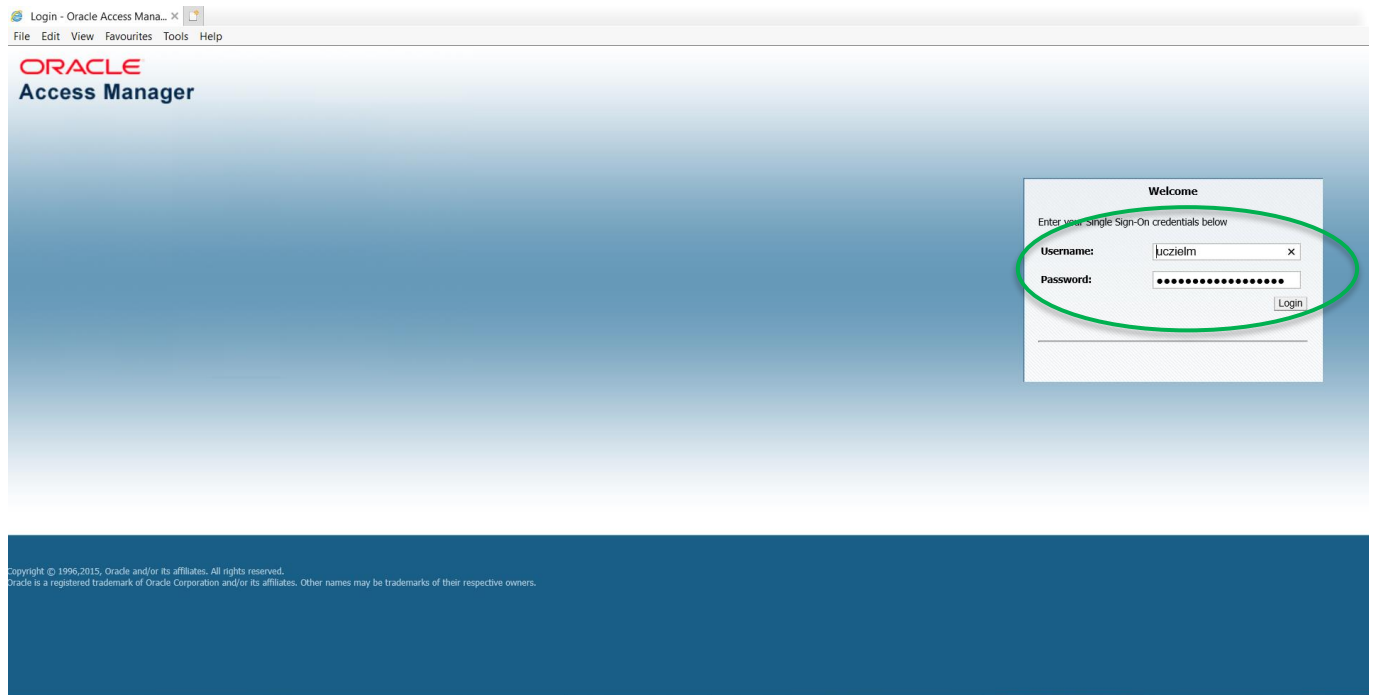
5. To request further details, click **Request Information**. A new email is opened, enter notes, click **Send**:



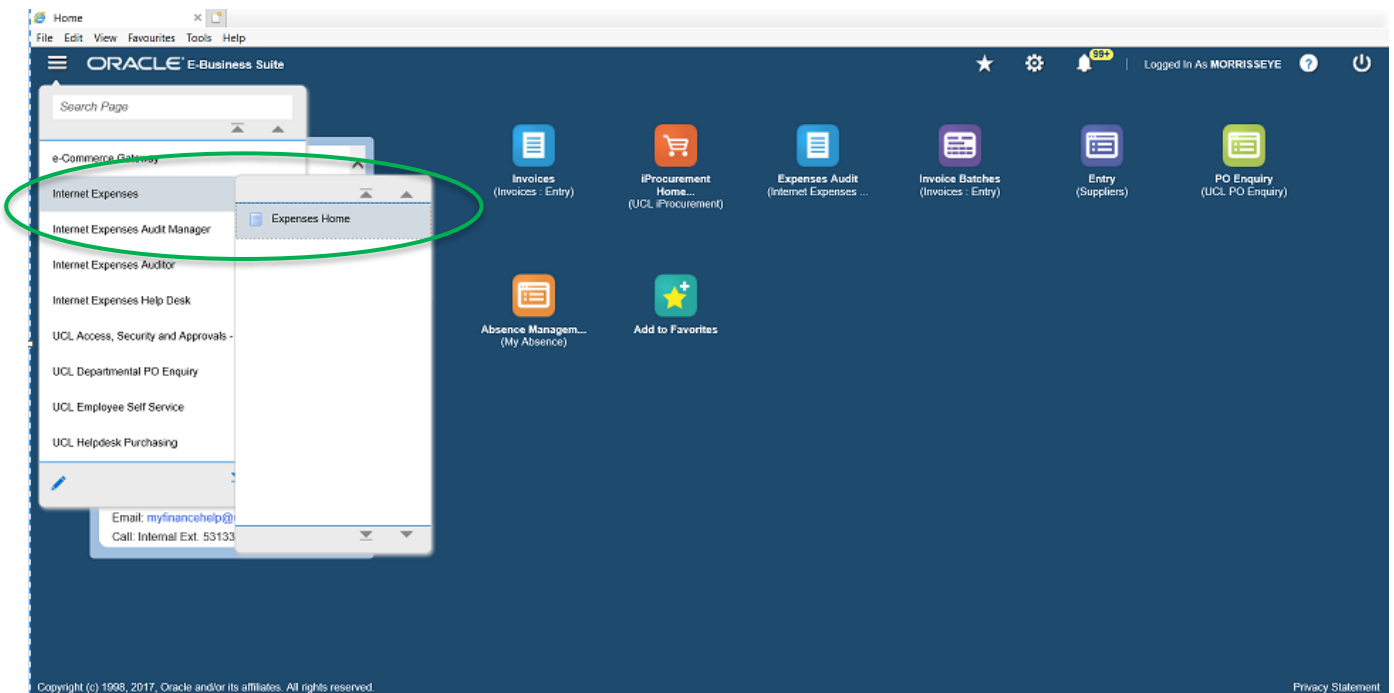
## Approval - MyFinance

When a claim is submitted, it is routed to the appropriate approver based on the project code charged and the amount of the claim. All approval requests can be viewed and authorised within MyFinance.

1. Go to [MyFinance](#). If you are accessing MyFinance remotely, please ensure you are using the [UCL Virtual Private Network](#) or [Desktop@UCL Anywhere](#)
2. Log in using your UCL log in credentials:



3. From the MyFinance homepage, select **Expenses Home** from the menu:



- The Expenses Home screen is displayed. This screen is the starting point for all iExpenses-related tasks. It provides information to authorised signatories on submitted iExpenses claims awaiting approval.

The following expense claims are either outstanding or have been paid in the last 30 days. **TIP Please note the supported browsers for use with Internet Expenses are Internet Explorer, Chrome and Safari. The more recent versions of Firefox are NOT compatible and using them will cause issues when entering claim lines.**

Claim Number	Submission Date	Status	Days Inactive	Current Approver	Receipts Status	Claim Total (GBP)	Purpose	Duplicate	Withdraw
UCLXEXP449254	19-Mar-2020	Pending Manager Approval		0 Harding, Mr Philip	Not Required	157.89	ABC Conference		
UCLXEXP449252	18-Mar-2020	Pending Manager Approval		1 Multiple	Not Required	2,468.00	Annual Season Ticket...		

If the status is Pending Your Resolution, you were sent a notification explaining the required action.

**Update Expense Claims**  
Click an Update icon to make changes to a saved, rejected, or returned expense claim.

Claim Number	Submission Date	Status	Claim Total (GBP)	Purpose	Update	Duplicate	Delete
No results found.							

**Notifications**

View: Open Notifications

Select Notifications:

From	Subject	Sent	Due
<input type="checkbox"/> Ansell, James	Expense UCLXEXP448263 for Ansell, James (140.30 GBP)	09-Mar-2020	
<input type="checkbox"/> Ansell, James	Expense UCLXEXP448262 for Ansell, James (5.00 GBP)	06-Mar-2020	
<input type="checkbox"/> Ansell, James	Expense UCLXEXP448261 for Ansell, James (20.00 GBP)	06-Mar-2020	
<input type="checkbox"/> Ansell, James	Expense UCLXEXP448260 for Ansell, James (420.00 GBP)	06-Mar-2020	

- Click on link to relevant claim:

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From	Subject	Sent	Due
<input type="checkbox"/> Ansell, James	Expense UCLXEXP448263 for Ansell, James (140.30 GBP)	09-Mar-2020	
<input type="checkbox"/> Ansell, James	Expense UCLXEXP448262 for Ansell, James (5.00 GBP)	06-Mar-2020	
<input type="checkbox"/> Ansell, James	Expense UCLXEXP448261 for Ansell, James (20.00 GBP)	06-Mar-2020	
<input type="checkbox"/> Ansell, James	Expense UCLXEXP448260 for Ansell, James (420.00 GBP)	06-Mar-2020	

6. The details of the claim can be viewed. It is marked whether a receipt image should be attached (for some categories receipts are not required, i.e. mileage claims). Click on link to receipt image:

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 Purpose: Conference in Liverpool  
 Report Total: 140.30 GBP  
 Employee Number: 2012889  
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**Instructions**  
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<b>Total</b>				<b>140.30</b>			

7. A message will appear, click **Open** and the receipt image will be available to view:

Do you want to open or save **06.03.20 - Breakfast at Conference ABC.jpg (4.73 MB)** from **ebscorepp-uat.adcom.ucl.ac.uk?**

Buttons: Open, Save, Cancel

8. When the claim and receipt images have been reviewed, choose action:

- a. **Approve** – claim will be approved and paid following any necessary checks in Accounts Payable
- b. **Reject** – claim will be rejected and a notification will be sent to the claimant informing them of this decision

Please note the More Information Request button is not currently working and is an issue that is being investigated by the Oracle EBS team. In the meantime, if you require more information, please reject the claim and ask the claimant to include more information and resubmit.

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