Agresso

Approving Expense Claims



An expense claim needs to be approved by the cost centre owner/budget holder before it can be processed by the Accounts Payable team in Finance for payment to the claimant. This approval step is normally undertaken after the claim has been verified by a designated user for the cost centre involved.

We would recommend that you do not approve any of your own expense claims as this will just delay the workflow as it will mean the task will get routed automatically to your manager/supervisor.

Each Agresso system approver for the cost centre will receive an email alert in regard to an expense claim. They will need to log into Agresso Web to approve the expense claim. The number of outstanding tasks for them will be shown on the top right-hand side of their sign on screen:

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1						×		
	Your tas	2						
	Invoice out of Tolerance							
	Expense Approval TransNo: 1622672 Supplier name: Fred, Green SuppID: E530583							
	Expense Approval TransNo: 1622675 Supplier name: Fred, Green SuppID: E530583							
	Expense Approval TransNo: 1622676 Supplier name: Fred, Green SuppID: E530583							
	Close							

The expense claim then needs to be reviewed by double clicking on a task:

QM	Expense Ap	proval TransNo: 1	622672 S	upplie ×										
														0 8
Name Fred, Green Resource ID 530583						23/08/2018 11: 24/08/2018 10 24/08/2018 10	53 Ted Wright (Integ 30 Pauline Ellis-Sack 43 Keith Smith (Integ	ra) (TWT) - Dist cey (PES) - Appri gra) (ECKSM) - /	ributed oved Approved					
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Мар	1	xpense type				Description			A Quantity	(Miles)	Rate	Currency	Amount	
	17 Busines	s Entertaining	Harry V	White from Financial	Solutions Lim	ited at Prets on T	uesday 21st August			0.00	0.00	GBP	6.38	
	16 Car Mile	age	Mile En	d to Bury St Edmund	s and back					75.00	0.45	GBP	33.75	
Σ						/							40.13	
* Exp	ense details													
Expens 17 Bu Amour	se type siness Entertai nt	ning	• 6.38	Date 21/08/2018			Description Harry White fro	m Financial Solution	s Limited a					
- GL A Accour 3220 Hospita	nalysis nt lity - General			Cat 3			Budcode FIN1000B Finance General			Free				

The expense claim will have been verified by a designated user within your cost centre, details of which are shown in the top right-hand pane in showing the workflow details.

Please check that the budget code used for the expense claim is valid along with the amount claimed.

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Approving Expense Claims	University of London
If the claim is valid then it can be approved it by pressing the is then sent in workflow to Finance for processing. A message shore successfully processed:	icon on the bottom left of this screen. It uld then appear stating that the item has been
I RM Expense Approval TransNo: 1622672 Supplie ×	
 The item is successfully processed. There are no more items to process. Please check these expenses and ensure that they comply to QMUL's travel policy. 	
It is then worthwhile checking to see if there are any more expenses shown by the number in the top right-hand side of the menu screer awaiting your approval. There are still 3 items in workflow awaiting Queen Mary University of London ISmith ISmith	e claims awaiting approval by you. This is n. If no number is shown there are no claims the attention of this user: to be rejected. We would recommend that you
Rejecting a claim:	
To reject press the reject icon at the bottom of the screen. You explaining why this expense claim is being rejected.	u will then be required to enter a comment
Expense Approval - Reject	
Reject	
Once you have entered your comment, you will then need to press claim will then be sent back to the claimant for amendment.	the Reject icon in this window to save. The