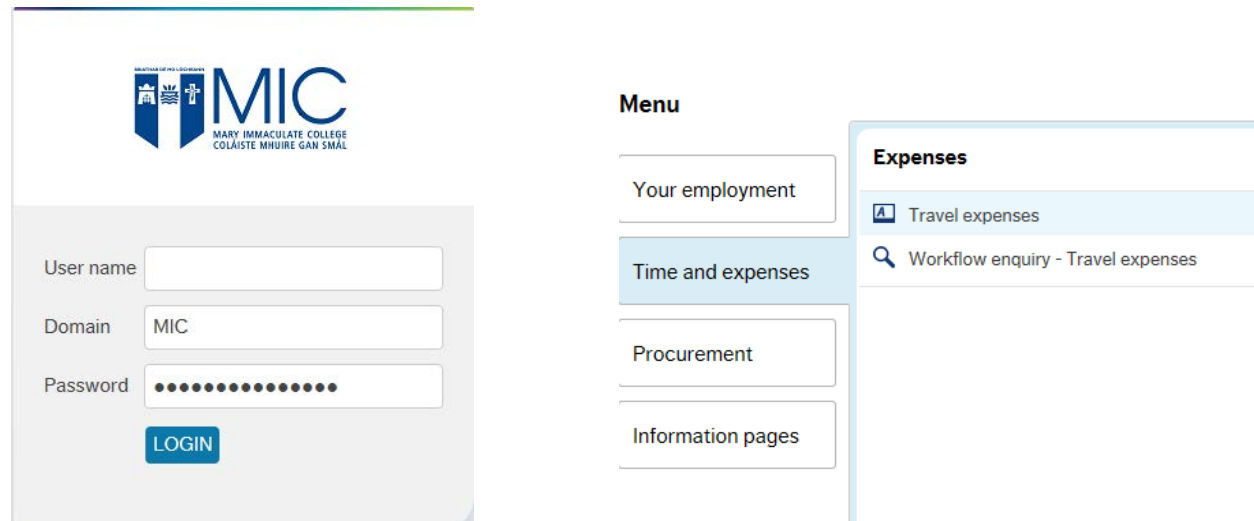


Quick Guide to entering a Research Fund claim on the web

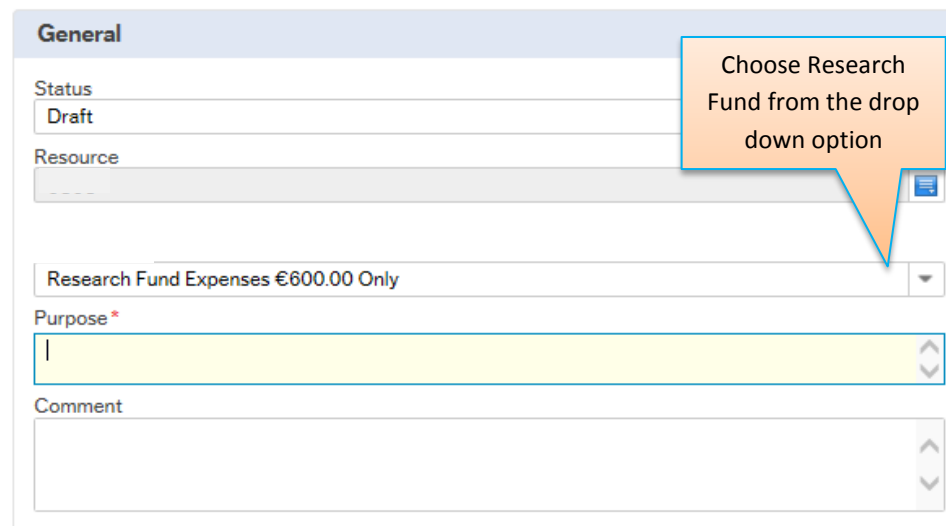
To enter expenses through Agresso please complete the following steps:

1. **Log in** to Agresso, using your name, Domain & Password.
2. Choose **Time & Expenses** from the menu on the left of the screen.
3. Choose **Travel Expenses** from the expenses menu this will open the expense claim screen.
4. The claim form is made up of 4 tabs, **General, Travel, Expenses & Summary**, opening on the General Tab.
5. Complete the following fields on the **General** Tab:
 - **Status** – Defaults to Draft, leave this in draft mode until the end and change to “ready” when you are ready to save.
 - **Travel Type** – This has a drop down list – choose Travel & Expenses or Research Fund
 - **Purpose** – Please provide a brief description of the purpose of the claim.
 - **Comment** – Additional information regarding the claim.
 - **Next Step** – This will move you on to the next tab.



Travel expenses

1 - General 2 - Subsistence 3 - Expenses 4 - Summary



Next step

6. The **Subsistence** tab –this tab should not be used when claiming from your Research fund. Subsistence costs should be claimed manually on the Expenses tab. Contact the Finance office if you have any queries regarding this.

Next Step

Travel expenses

1 - General 2 - Subsistence 3 - Expenses 4 - Summary

Subsistence

Destination *	<input type="text" value="Ireland"/>		
	IE		
Start date	<input type="text" value="29/08/2016"/>	Start time	<input type="text" value="00:00"/>
End date	<input type="text" value="29/08/2016"/>	End time	<input type="text" value="00:00"/>
Nights	<input type="text" value="0"/>		

Previous step Next step

Do not use the subsistence tab when claiming from Research fund

7. The **Expenses** tab. You may claim for Research Expenses on this tab Eg. Train Tkt, Book receipt, Conference attendance/travel etc. y Please completing the following fields:

- **Add** – will give you a new line under expenses items. Add a line for each expenses type.
- **Expenses Type** - Choose expense type from drop down list. Research Expenses or Research Mileage.
- **Date**
- **Description** – Provide a description of expenses
- **Amount/Km** – Enter receipt amount . For travel enter number of Kilometres.
- **GL Analysis** – In the case of subsistence you will need to complete the **RFetype** section, type **R** in the box for a dropdown list
- **Default GL Analysis** – This field is not required. Cost centre are not linked to the Research fund accounts.
- **Next Step**

Travel expenses

1 - General 2 - Subsistence 3 - Expenses 4 - Summary

0002

Default GL analysis

Costc

Subtype

Update all items

Expense items

<input type="checkbox"/>	Expense type	PD	Description	KM's or Amount	EURO	Receipt
<input type="checkbox"/>	Research Expenses	RF1	[Enter research fund details]	50.00	50.00	<input checked="" type="checkbox"/>
	Σ			50.00	50.00	

Add Delete Copy P11D ref

Add – New line needed for each expense EG Train Tkt, flight etc.

This section does not need to be completed when claim from Research Fund.

Expense details

Expense type

Research Expenses

Description

[Enter research fund details]

KM's or Amount

50.00

Date*

29/08/2016

Currency*

EUR

Curr. amount

50.00

EURO

50.00

GL Analysis

Account*

B7500

Research Funds

Tax system

Resno*

Jean Guinane

Rfetype*

RFE002

Travel

Tax code*

0

VAT @ 0%

Choose **Expense type** from drop down list. Eg, Research Mileage, Research Expenses

Sub-Analysis section – If this field doesn't default in (subsistence), Type first letter of name for drop down list – Eg RFETYPE- **Type R**

Previous step

Next step

Save

Clear

Open

Print preview

Delete

Cost distribution

Export

8. The **Summary** tab gives an overview of the total claim. If you are ready to submit this claim change the status from **Draft** to **Ready** & press **Save**. You may also keep it in draft mode & save it for later to add further expense items.
9. When you press **Save** a transaction number will be generated.
10. All receipts/documentation will need to be submitted to the Finance Office in the Expenses Envelope. Please complete all the details required on the envelope.

1 - General
2 - Subsistence
3 - Expenses
4 - Summary

General

0002

Transaction date 21/06/2016

Purpose Enter detail of the claim - Eg. Travel to Dublin for meeting in St Pat's.

Comment Enter additional information if needed.

Status * Draft

Transaction number 0

Subsistence

Destination	Start date	Start time	End date	End time	Description
Ireland	21/05/2016	07:30	22/05/2016	17:30	Enter detail of the claim - Eg. Travel to Dublin for meeting in St Pat's.

Expense items

Expense types	Description	Date from	Date to	Number	Rate	Costc	Tratype	Currency	Curr. amount	EURO
	Ten Hour Rate	22/05/2016	22/05/2016	1.00	33.61	20200	TRA002	EUR	33.61	33.61
	Overnight Rate	21/05/2016	21/05/2016	1.00	125.00	20200	TRA002	EUR	125.00	125.00
Train Ticket	Return Tkt Limerick to Dublin	21/05/2016	21/05/2016	60.00	0.00	20200	TRA006	EUR	60.00	60.00
Σ										218.61

Change **status** to "Ready" when happy to submit claim.

Once saved a **Transaction number** will be generated. If you have receipts to submit this number will need to be entered on the expenses envelope.

Previous step

Save
Clear
Open
Print preview
Delete
Cost distribution
Export

What Happens Next?

Once saved the claim is funds checked to ensure there is enough funds to cover the costs. If there are sufficient funds the claim will be sent to the Finance Office for payment. If there isn't enough funds to cover the full claim it will immediately be returned to you.

Claims will only be processed for payment once all relevant receipts/documentation is received in the official expenses envelope.