REQUESTING AN EXPENSE ADVANCE

Log on to Agresso

Click on Time and Expenses on the menu list

Menu will open at the top left hand corner

Click on Expenses and the menu will expand
Double Click on Travel Expenses and the following menu will appear

**Step 1**

You will note that under the Resource field your name appears.

The fields with a red asterix against them are mandatory.

Accept the default data in the Travel Type field.

In the Month/Year of Claim field enter a unique description. E.g. Adv – 23/03/14

Tab out of this field into the Comment field.

Enter a comment field. This is a free text field that can be used to enter a description. Enter the reason for which the advance is being requested e.g. Higher Education Fair – 5th April 2014. This description will be applied to every expense line.
The screen will look like this after the data has been entered.

Tab out of the Comment Field and the cursor will go to the Next Step button.

Click on the Next Step button and that will take you to next screen, as below:
Step 2

To add the first row of your expense Click on the Add button and this will open the following screen:

Figure 1

You now need to choose the Expense Type - Advance, click on the down arrow against the Expense Type field and this will give you a list to choose from as follows:

Click on Advance. This will take you to this screen.
Click on the Tab key or click on Next Step
Again all fields with a red asterix are mandatory.

- Enter Date – the date defaults to today’s date. Accept the default.
- Description – Enter the business purpose of the advance.
- Amount – enter amount claimed

GL Analysis:

- Account – defaults to the F120 AP Expense Advances account.
- Subproj – Enter the sub-project
- Tax Code – defaults from the Expense Type; accept default.
- Tax System – this will be populated once the sub-project has been entered
The screen will look like this once it has been completed:

Once you have finished Double Click on  and that will take you to the Summary page and the screen will look like below:
This will enable you to review the information that you have entered before you commit the advance for approval.

If anything is incorrect you can go back to the line and make a correction.

Click on the button and this will take you back to the detail input screen where you can make any amendments. Once you have made any amendments, Click on the button and when you view the Summary you will see that the amendment has been made.
SUBMITTING THE EXPENSE ADVANCE FOR APPROVAL

The Status is Draft, see highlighted in yellow in the screenshot below. Whilst the expense claim is in Draft it can be saved for updating later but it will not go for approval until the Status has been changed to Ready.

Click on the down arrow by the side of the word Draft and this will display a further option see below:

Click on Ready and Tab out of the field.

On the toolbar click button. The following message will be displayed:

The expense advance has now been submitted for approval.