

How to Edit a Rejected or Draft Expense Claim

On the Expenses screen rejected claims may be found under the 'In progress' tab, if you need to amend your claim then navigate to that tab to recall the claim, similarly you can edit/amend your Draft claims at any stage located within the 'Draft' tab. If you do not wish to change the rejected claim and simply want to submit it for approval again then click on Send for approval.

To modify a claim that has been rejected back to you, click on the 'In progress' tab (i) and select your claim (ii)

i.

The screenshot shows the UNIT4 Agresso interface. At the top, there's a header with 'UNIT4 Agresso' and user information for 'University College Cork' and 'AGRESSO'. Below the header, there's a navigation bar with 'UC Expenses X'. The main content area is titled 'Expenses' and includes a 'New expense claim ?' section with buttons for 'Vouched Expenses', 'Conference Rate Claim outside EU', 'Conference Rate Claim within EU', and 'Subsistence Travel outside EU'. Below that is a 'Subsistence Travel within EU' button. The 'Expense overview ?' section shows three tabs: 'Draft' (16), 'In progress' (1), and 'Completed'. A red arrow points to the 'In progress' tab.

ii.

This screenshot shows the same UNIT4 Agresso interface as above, but with a modal window open over the 'In progress' tab. The modal window is titled 'In progress' and contains a table with the following data:

| Date from | Date to | Country | Purpose | Workflow status |
|------------|---------|---------|--------------------------|--------------------|
| 29/05/2015 | | | 29/05/2015 Expense 15481 | Workflow in pro... |

There is a 'Close' button at the bottom of the modal window.

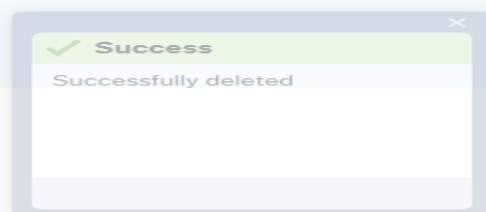
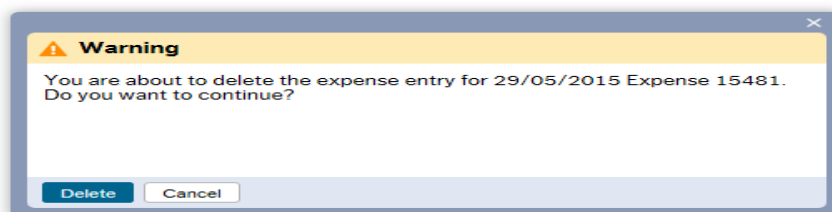
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If you want to amend the claim by removing a particular line, you can delete individual lines by clicking on the checkbox as shown and then click 'Delete expense' or if you wish to add an additional line to the expense, click on Add expense, complete the details and send for approval. To cancel the claim completely click on the 'Delete' button at the end of the screen (next to Print Preview)

The screenshot shows the 'Expenses: Vouched Expenses' page. At the top, there is a breadcrumb trail: Expenses > Expenses 09/02/2016 (610074440). Below this, the page is titled 'Expenses: Vouched Expenses'. There are two main sections: 'What was the purpose?' and 'What did you spend?'. The 'What was the purpose?' section shows 'Test for Deletion' and 'Date 09/02/2016'. The 'What did you spend?' section is a table with columns: Category, Date, Description, Quantity, Currency, Curr. amount, and Amount. The table contains four rows of expense items. The third row, 'Taxi Hire - outside EU', is highlighted in blue and has a red arrow pointing to its checkbox. Below the table, there are buttons for 'Add expense', 'Delete expense', 'Send for approval', 'Print preview', 'Delete', and 'Add information'. A green box with an arrow points to the 'Add expense' button, containing the text: 'Click on Add expense to add additional expense items & then Send for approval'. A red box with an arrow points to the 'Delete expense' button, containing the text: 'Highlight line and click on Delete expense to remove individual lines'. A blue box with an arrow points to the 'Delete' button, containing the text: 'To remove claim entirely click on Delete at end of screen here'. The total expenses are shown as '€ 4,489.00'.

| Category | Date | Description | Quantity | Currency | Curr. amount | Amount |
|--|------------|--|----------|----------|--------------|----------|
| <input type="checkbox"/> Air Travel - outside EU | 09/02/2016 | India | 3,574.00 | EUR | 3,574.00 | 3,574.00 |
| <input type="checkbox"/> Conference Fees - outsid... | 09/02/2016 | Conference Fees (outside EU) (E) | 800.00 | EUR | 800.00 | 800.00 |
| <input checked="" type="checkbox"/> Taxi Hire - outside EU | 09/02/2016 | Taxi from Airport to Hotel and return and to conference c... | 35.00 | EUR | 35.00 | 35.00 |
| <input type="checkbox"/> Restaurants, Meals - out... | 09/02/2016 | Restaurants, Meals, Entertainment, Hospitality (outside E... | 80.00 | EUR | 80.00 | 80.00 |

A warning message will appear onscreen if you click on Delete expense, click on Delete to continue with the removal of the line or whole claim

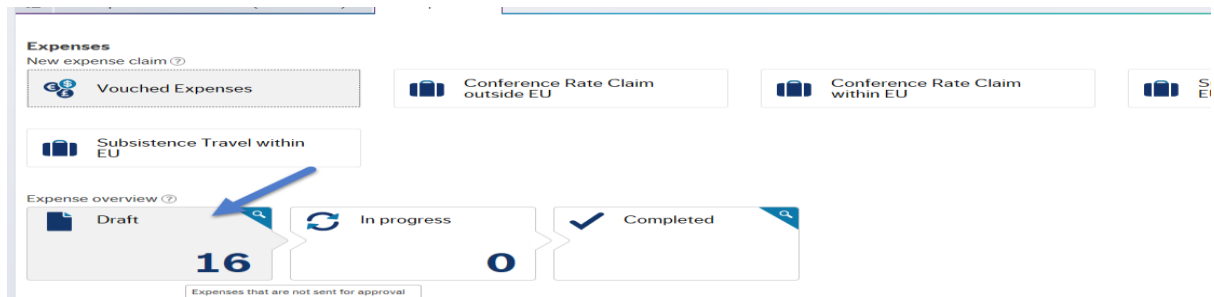


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On the Expenses landing page you can see that the In Progress tab shows that the claim is no longer available if it has been deleted in its entirety

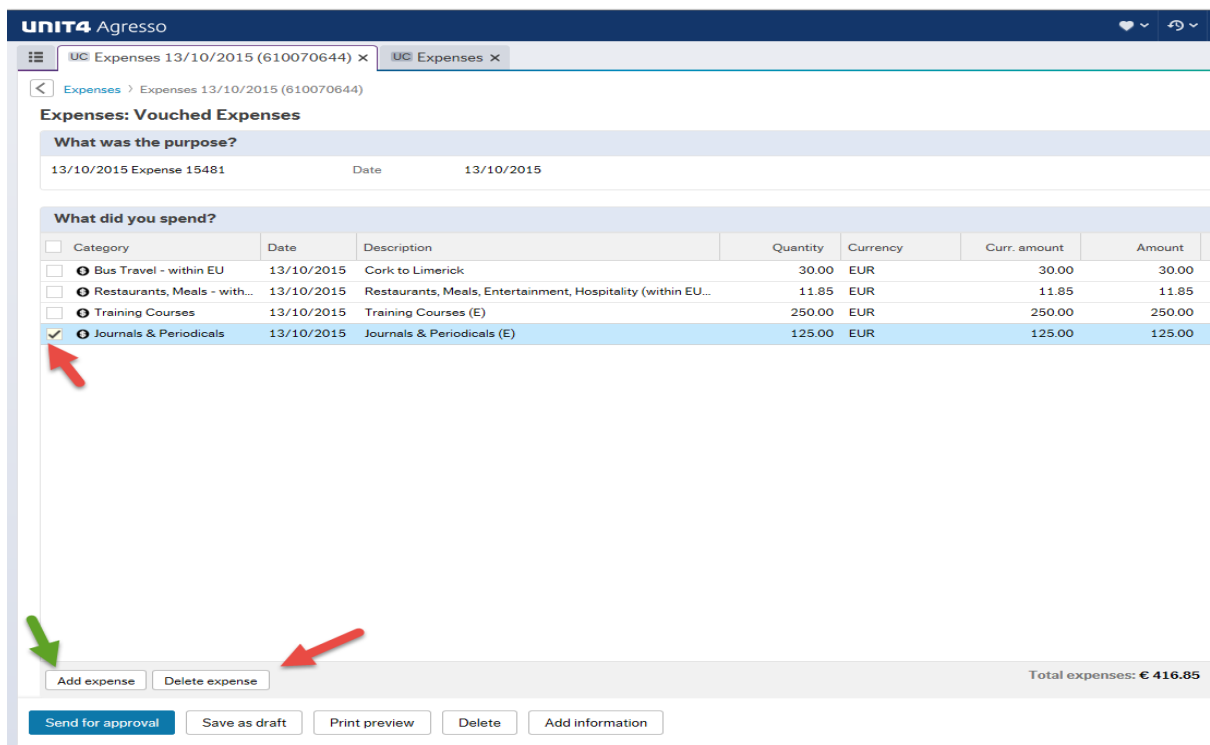


The process is exactly the same for Draft claims, except you click on the **Draft** tab to access a particular draft claim.



Again you can add lines to the claim or you can remove a line by selecting as shown and then click on Delete Expense

Example 1: Select a particular line by clicking on checkbox and click on Delete expenses



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Example 2: Claim where a single line has been removed.

The screenshot shows the UNIT4 Agresso interface for an expense claim. The breadcrumb trail is "Expenses > Expenses 13/10/2015 (610070644)". The title is "Expenses: Vouched Expenses".

What was the purpose?

13/10/2015 Expense 15481 Date 13/10/2015

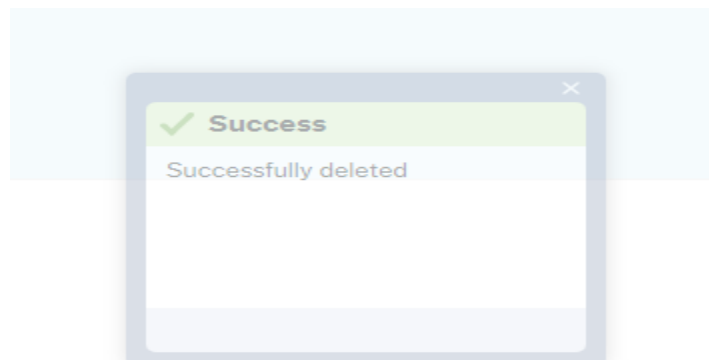
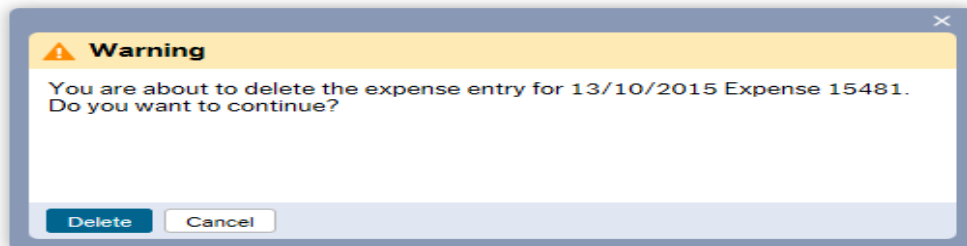
What did you spend?

| Category | Date | Description | Quantity | Currency | Curr. amount | Amount | |
|---|------------|--|----------|----------|--------------|--------|--|
| <input type="checkbox"/> Bus Travel - within EU | 13/10/2015 | Cork to Limerick | 30.00 | EUR | 30.00 | 30.00 | |
| <input type="checkbox"/> Restaurants, Meals - with... | 13/10/2015 | Restaurants, Meals, Entertainment, Hospitality (within EU... | 11.85 | EUR | 11.85 | 11.85 | |
| <input checked="" type="checkbox"/> Training Courses | 13/10/2015 | Training Courses (E) | 250.00 | EUR | 250.00 | 250.00 | |

Total expenses: € 291.85

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

Alternatively remove the entire claim from the system by clicking on Delete (at the end of the screen) next to Print Preview button. A warning message below will appear, click on Delete again to proceed.



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The landing page will update to show a reduced number of Draft claims if you have completely deleted the expense.

The screenshot displays the UNIT4 Agresso interface for managing expense claims. At the top, there is a header with the logo and the text "UNIT4 Agresso". Below the header, a navigation bar shows "UC Expenses x". The main content area is titled "Expenses" and includes a link for "New expense claim ?".

Under the "New expense claim ?" section, there are four buttons for creating different types of claims:

- Vouched Expenses (highlighted with a dashed border)
- Conference Rate Claim outside EU
- Conference Rate Claim within EU
- Subsistence Travel within EU

Below this, the "Expense overview ?" section provides a summary of claim statuses:

| Status | Count |
|-------------|-------|
| Draft | 15 |
| In progress | 0 |
| Completed | |

A blue arrow points to the "Draft" status box, which contains the number 15. Each status box also features a magnifying glass icon in the top right corner.