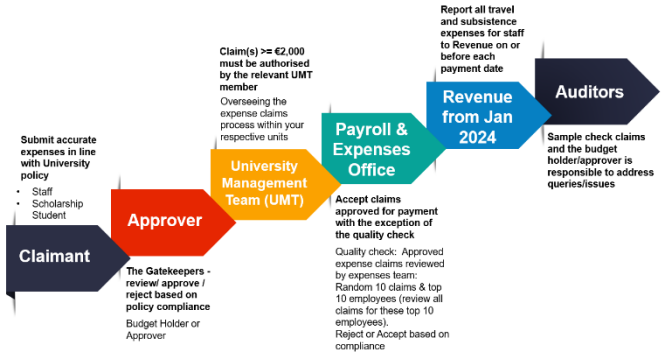
EXPENSES AGRESSO WEB → HOW TO APPROVE/REJECT T&S CLAIM?

Ollscoil na Gaillimhe
University of Galway

Budget Holders and Approvers

- Each budget holder (or delegate) is responsible for approving expenses related to specific cost centres or subaccounts assigned to them. These subaccounts are sometimes referred to as budget codes or project codes.
- Additionally, senior University officials, such as Vice Presidents and Deans, may also serve as approvers due to their organisational responsibilities.

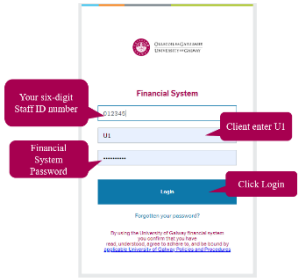


Step 1: E-mail alert received per travel and subsistence claim.

Approvers are alerted by e-mail from **"Agresso System"** that a claim awaits your attention.

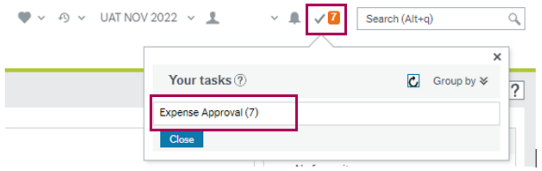
Step 2: Agresso Login

a) Username: Your six-digit Staff ID number
b) Client: U1
c) Password: Financial System Password

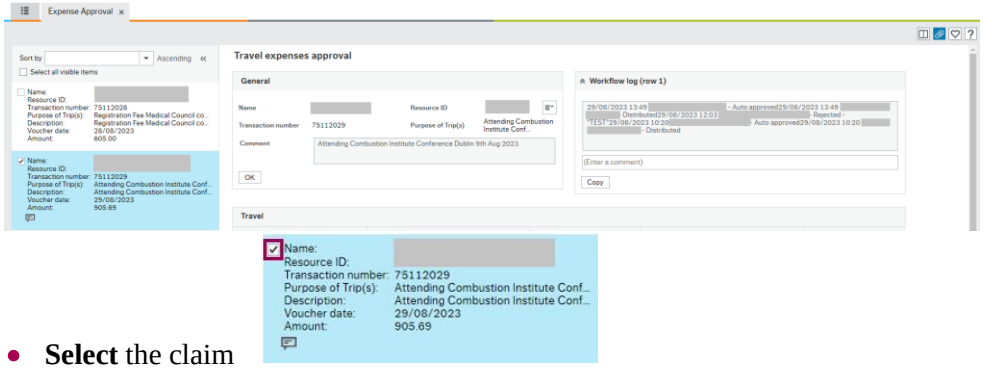


Step 3: Review Pending Expenses Claims

- Click on the 'Task' option located in the top right corner
- Choose 'Expense Approval' to access and review these claims



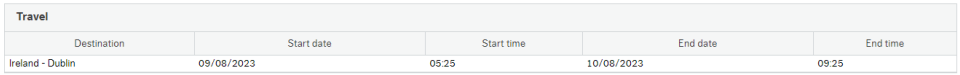
Step 4: The left panel will display a list of claims awaiting your review



- **Select** the claim

- **Review the comment** to ensure full details of the trip, destination and dates are provided

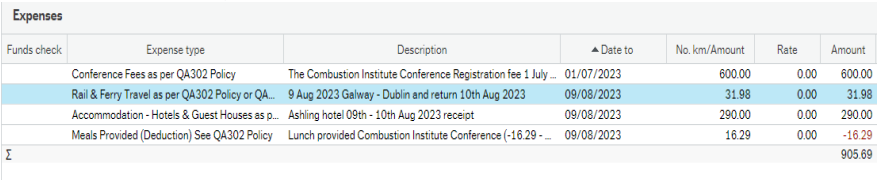
- **Ensure** the travel details are correctly entered



Travel

Destination	Start date	Start time	End date	End time
Ireland - Dublin	09/08/2023	05:25	10/08/2023	09:25

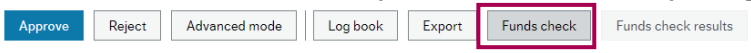
- Verify expenses for validity, ensure they are eligible for reimbursement, confirm the relevant dates, and check for correct amounts



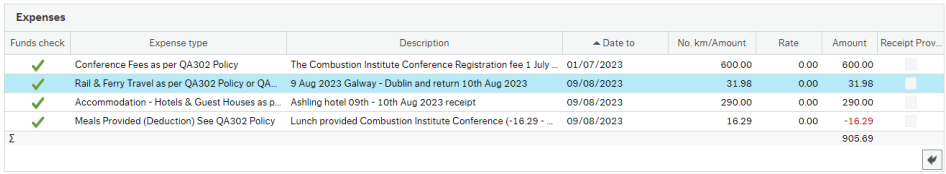
Expenses

Funds check	Expense type	Description	Date to	No. km/Amount	Rate	Amount
	Conference Fees as per QA302 Policy	The Combustion Institute Conference Registration fee 1 July ...	01/07/2023	600.00	0.00	600.00
	Rail & Ferry Travel as per QA302 Policy or QA...	9 Aug 2023 Galway - Dublin and return 10th Aug 2023	09/08/2023	31.98	0.00	31.98
	Accommodation - Hotels & Guest Houses as p...	Ashling hotel 09th - 10th Aug 2023 receipt	09/08/2023	290.00	0.00	290.00
	Meals Provided (Deduction) See QA302 Policy	Lunch provided Combustion Institute Conference (-16.29 - ...	09/08/2023	16.29	0.00	-16.29
Σ						905.69

- Verify the attached receipts/documents. Click the blue paperclip icon in the top right corner for details
- Click on **'Funds Check'** to verify current fund availability for approval.



  - A green tick should appear next to each expense item entered if funds are **currently** sufficient. Please note that fund availability may change before final approval by the Expenses Office, as you are spending the funds for various other expenses such as your staff wages, purchase orders, etc.



Expenses

Funds check	Expense type	Description	Date to	No. km/Amount	Rate	Amount	Receipt Prov...
✓	Conference Fees as per QA302 Policy	The Combustion Institute Conference Registration fee 1 July ...	01/07/2023	600.00	0.00	600.00	
✓	Rail & Ferry Travel as per QA302 Policy or QA...	9 Aug 2023 Galway - Dublin and return 10th Aug 2023	09/08/2023	31.98	0.00	31.98	
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Σ						905.69	

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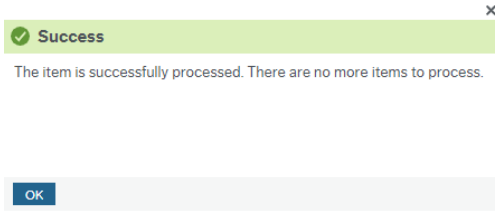
To Approve a Claim

As an approver, please have a careful look toward the policies. To make sure that each claim you approve is in line with the policies

- Select the claim(s) to approve and click the 'Approve' button in the bottom left-hand corner

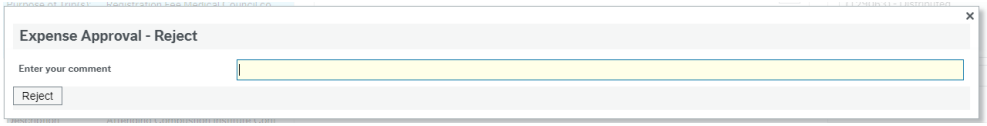
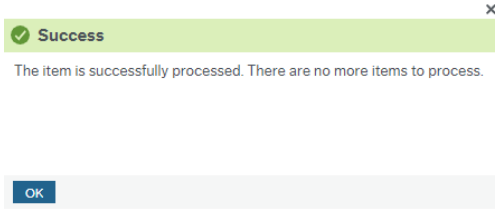
- After successful approval, you'll receive a confirmation message, and the claim will be removed from your task list



To Reject a Claim

Select the claim and click the 'Reject' button at the bottom left

- Once the rejection is successful, you'll be prompted to leave an optional **rejection comment** for the claimant in the provided box



- Afterward, a green confirmation message will appear, and the claim will no longer be visible in the middle pane or your task list