

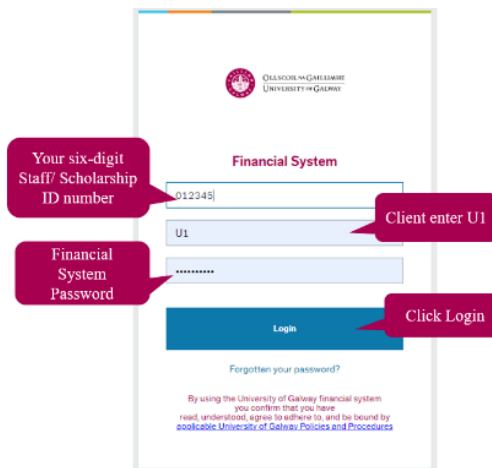
Managing Your Travel & Subsistence Claim in "Draft" Mode

At times, you might begin working on a travel and subsistence claim, save it as a "Draft," and then log off, intending to return later for further edits. This document provides step-by-step instructions on how to retrieve a "draft" claim, make necessary changes, and submit it for approval to the budget holder (approver) and for a financial check conducted by the Payroll and Expenses Office. Remember to attach electronic receipts as needed.

Important Note: This guide addresses the specific scenario of managing claims saved as "Draft." If you need assistance with checking the status of a claim that has already been sent to the approver (a claim saved as "Ready"), please refer to the "How to check the status of a claim" guide.

Agresso [Login](#)

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

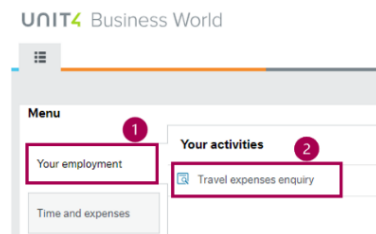
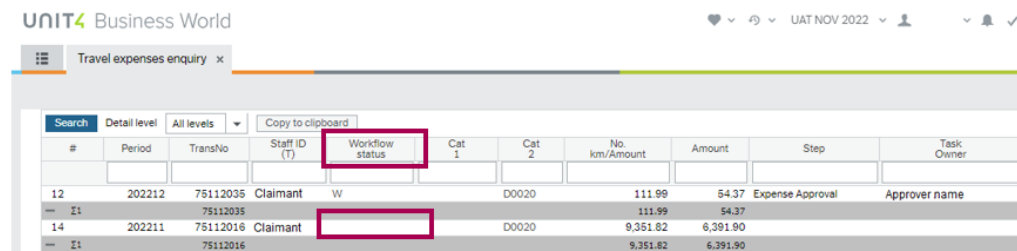


The screenshot shows the 'Financial System' login page. It includes a header with the University of Galway logo and name. Below the header are four input fields: a six-digit Staff/Scholarship ID number (with callout 'Your six-digit Staff/ Scholarship ID number'), the client 'U1' (with callout 'Client enter U1'), a password field (with callout 'Financial System Password'), and a 'Login' button (with callout 'Click Login'). There is also a 'Forgotten your password?' link and a disclaimer at the bottom.

Method 1

Step 1: Search your claims

Menu → under 'Your Employment' → click 'Travel expenses enquiry'

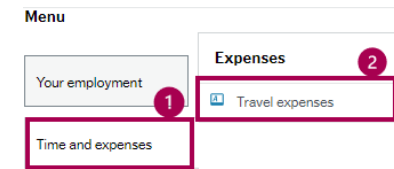
#	Period	TransNo	Staff ID (T)	Workflow status	Cat 1	Cat 2	No. km/Amount	Amount	Step	Task Owner
12	202212	75112035	Claimant	W		D0020	111.99	54.37	Expense Approval	Approver name
---	I1	75112035					111.99	54.37		
14	202211	75112016	Claimant			D0020	9,351.82	6,391.90		
---	I1	75112016					9,351.82	6,391.90		

Blank: status means your claim has been saved as a 'draft.' To proceed for approval by your approver, you must save it as 'Ready.' Refer to the [FAQs](#) for guidance on handling claims saved as 'draft'

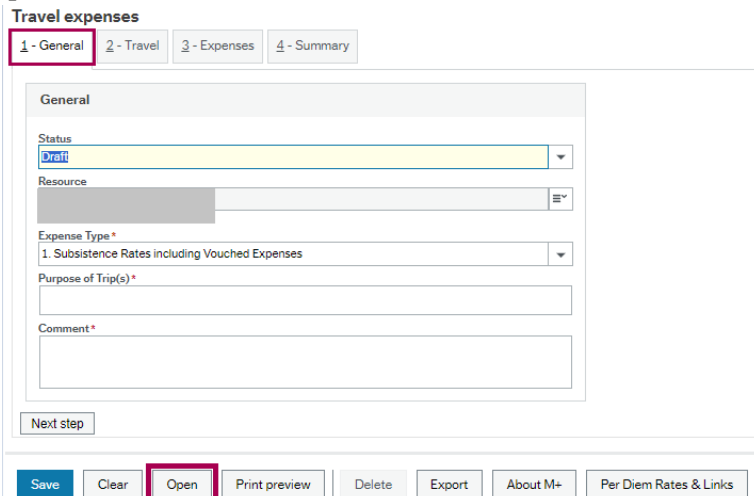
EXPENSES AGRESSO WEB → HOW TO SEARCH FOR DRAFT EXPENSES?

Method 2

Step 1: Search and display all your claims. On the menu, select ‘Time and Expenses’ and then ‘Travel Expenses’



Step 2: You will now see the screen below:



Travel expenses

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

General

Status: Draft

Resource: [Redacted]

Expense Type*: 1. Subsistence Rates including Vouched Expenses

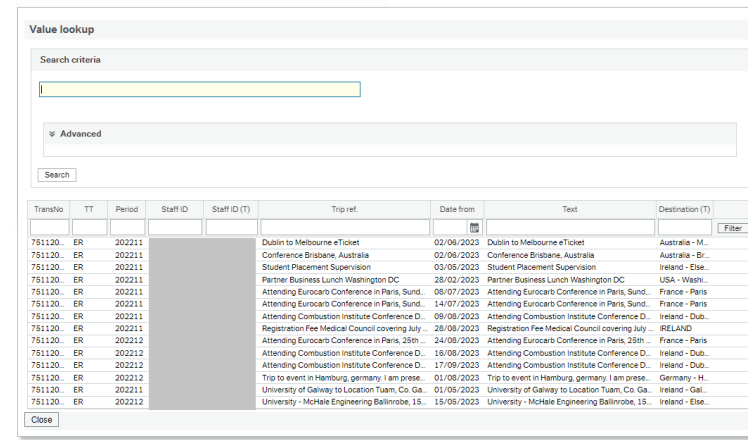
Purpose of Trip(s)*

Comment*

Next step

Save Clear Open Print preview Delete Export About M+ Per Diem Rates & Links

b) You will get a pop-up box of all claims you have submitted but have not been reimbursed yet



Value lookup

Search criteria

Advanced

Search

TransNo	TT	Period	Staff ID	Staff ID (T)	Trip ref.	Date from	Text	Destination (T)
751120..	ER	202211			Dublin to Melbourne eTicket	02/08/2023	Dublin to Melbourne eTicket	Australia - M...
751120..	ER	202211			Conference Brisbane, Australia	02/08/2023	Conference Brisbane, Australia	Australia - Br...
751120..	ER	202211			Student Placement Supervision	03/05/2023	Student Placement Supervision	Ireland - Else...
751120..	ER	202211			Partner Business Lunch Washington DC	28/02/2023	Partner Business Lunch Washington DC	USA - Washi...
751120..	ER	202211			Attending Eurocarb Conference in Paris, Sund...	08/07/2023	Attending Eurocarb Conference in Paris, Sund...	France - Paris
751120..	ER	202211			Attending Eurocarb Conference in Paris, Sund...	14/07/2023	Attending Eurocarb Conference in Paris, Sund...	France - Paris
751120..	ER	202211			Attending Combustion Institute Conference D...	06/08/2023	Attending Combustion Institute Conference D...	Ireland - Dub...
751120..	ER	202211			Registration Fee Medical Council covering July...	28/08/2023	Registration Fee Medical Council covering July...	IRELAND
751120..	ER	202212			Attending Eurocarb Conference in Paris, 25th...	24/08/2023	Attending Eurocarb Conference in Paris, 25th...	France - Paris
751120..	ER	202212			Attending Combustion Institute Conference D...	16/08/2023	Attending Combustion Institute Conference D...	Ireland - Dub...
751120..	ER	202212			Attending Combustion Institute Conference D...	17/09/2023	Attending Combustion Institute Conference D...	Ireland - Dub...
751120..	ER	202212			Trip to event in Harburg, germany am.prese...	01/05/2023	Trip to event in Harburg, germany am.prese...	Germany - H...
751120..	ER	202211			University of Galway to Location Tuam, Co. Ga...	01/05/2023	University of Galway to Location Tuam, Co. Ga...	Ireland - Gal...
751120..	ER	202212			University - McHale Engineering Ballinrobe, 15...	15/05/2023	University - McHale Engineering Ballinrobe, 15...	Ireland - Else...

Close

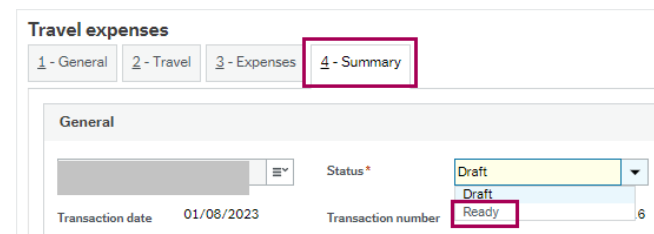
a) Press ‘Open’ on the bottom of this screen

Step 3: Choose the claim that you had saved as “Draft” mode by clicking on the claim number

Step 4: Navigate to section 4 - Summary

Submit your claim for approval by changing the status from “Draft” to “Ready” and click Save.

Your claim will now be in the workflow awaiting a specific cost centre (subaccount) approver attention.



Travel expenses

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

General

Status*: Draft

Transaction date: 01/08/2023 Transaction number: Ready 6