How to claim overtime & allowances

This guidance will provide step by step instructions on how to submit a mileage/expense claim within Business World. Employees should ensure an adequate level of detail is included within the description field.

Mileage Claim - include the starting point of the journey, destination & the reason for travel.

Expense Claim - include further detail on what the reason is for the expense.

NOTE: Please ensure that any receipts which are accompanying your claim have been scanned and saved in an easily accessible folder prior to beginning your claim. (iPad users can use the built-in camera function to zoom in on their receipt and take a picture to upload to the system)

1	Menu Start pages Your employment Time and Expenses Forms Absences	Navigate to **'Your Employment'** tab then click on the **'Time and Expenses'** button in the Start pages section. This will open the Time and Expenses window.
2	**Time and Expenses** New expense claim ⑦ Mileage and Expenses	Click on the **'Mileage and Expenses'** button within the Time and Expenses window to begin your claim.
3	**Time and Expenses: Mileage and Expenses** **What was the purpose?** Purpose * Train fare from Paisley to Glasgow for training course Date * 31/01/2021 Cost categories Position TEST ERP Support ▼ 112870 Apply to all ⑦	**Purpose:** In the purpose field you should provide an overview of what your expense is relating to. For example, *'Train fare from Paisley to Glasgow for training course'* **Date**: This will auto-populate with today's date as the date you are beginning your claim. **There is no need to change this.** **Position:** The position field will auto-populate with your main position. If you have more than one position use the black triangle to select the position that you will be claiming the overtime against.
4	**What did you spend?** ☐ Category Expense Add expense Copy expense Delete expense	Navigate to the 'What did you spend?' section. Select the **'Add expense'** button to add detail to your claim.
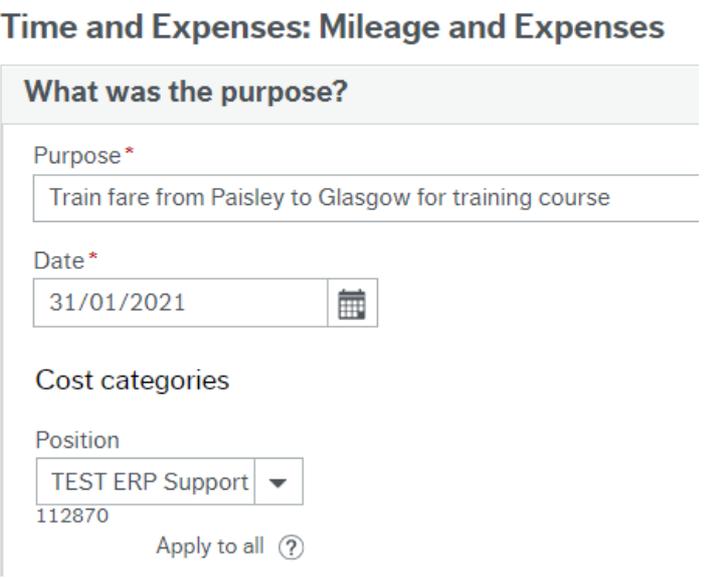
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How to claim mileage

A. Select the expense from the drop-down menu.

(e.g. Mileage car/van)

B. Use the calendar icon to select the date of the expense.

C. Enter further details about the expense (Include the starting point, destination & reason for travel)

D. Enter the total quantity of miles to be claimed.

What did you spend?

A Category	Expense dat B Description C	Quantity D	Amount
🚗 Mileage (Car/Van) ▼	11/01/202 📅 Mileage from HQ to Castle Semple & back for repairs inspectior	22.00	9.90

Mileagetype E	Rate per mile (pence)	No. of Passengers (Max 4) F	First Passenger Rate	Subsequent Passenger Rate
Business Miles ▼ BUSINESS	45.00	0.00	12.00	6.00

Mileage Type

1.00

Cost categories

Position G	Cost centre* H	POSNO PD analysis GL*	Employee Type*
TEST ERP Support ▼ 112871	Business World Su ••• FT0005	TEST ERP Support ••• 112871	Local government (••• 41

Apply to all ⓘ

E. Select the mileage type from drop down (e.g. Business Miles)

F. If you had passengers enter the number in this field

G. This field will auto-populate with your main post. If you have more than one job, you can use the triangle to select the position you are claiming against.

H. This field will auto-populate based on your main post.

To charge your claim to a different cost centre use the triangle to select the alternative cost centre from the drop-down

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How to claim expenses

A. Select the expense from the drop-down menu. (e.g. Business fares (NonTax))

B. Use the calendar icon to select the date of the expense

C. Enter further details about the expense (Include the starting point, destination & reason for travel)

D. Enter the total expense amount to be claimed.

What did you spend?

A Category	B Expense date	Description C	D Amount
☐ 🚄 Business fares (Non ...	14/01/2021	Train fare Paisley Gilmour to Glasgow Central for training course RTN	5.20

Cost categories

Position E	Cost centre* F	POSNO PD analysis GL*	Employee Type*
TEST ERP Support ▼ 112870	Business World Su ••• FT0005	TEST ERP Support ••• 112870	Local government (••• 41

Apply to all ⓘ

E. This field will auto-populate with your main post. If you have more than one job, you can use the triangle to select the position you are claiming against.

F. This field will auto-populate based on your main post. To charge your claim to a different cost centre use the triangle to select the alternative cost centre from the drop-down

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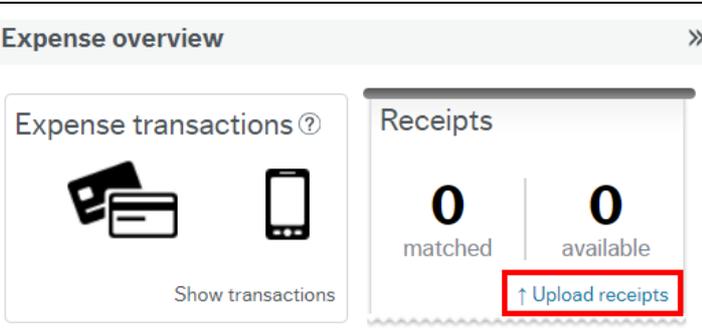
6	**Expense overview** » Expense transactions ⓘ Show transactions Receipts 0 matched 0 available ↑ Upload receipts	Select the **'upload receipts'** button at the top right of the expenses overview section **Note:** If a resource has already uploaded a receipt in this screen, the link will read **'Show receipts'**
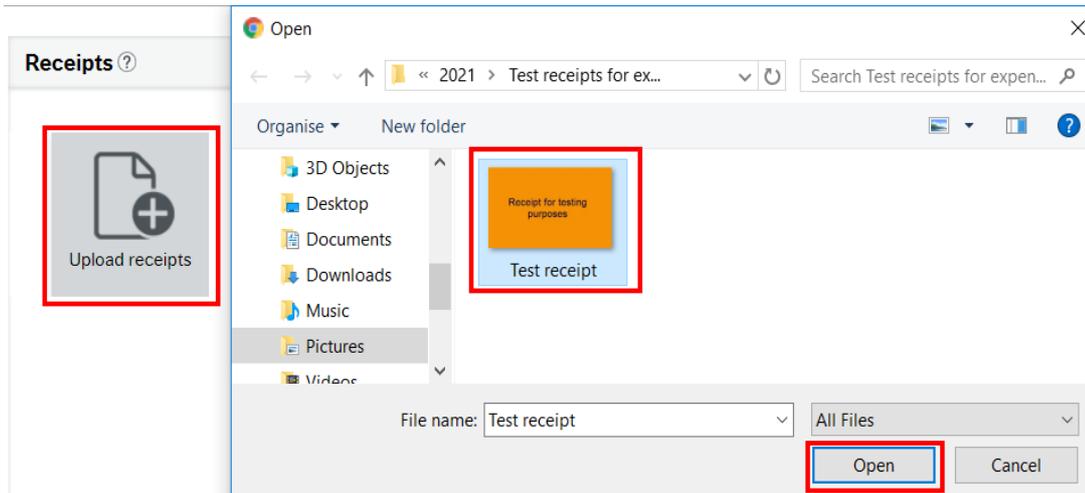
7	Receipts ⓘ Upload receipts **Open** window — navigation to folder "« 2021 › Test receipts for ex…", Organise ▾ New folder, 3D Objects, Desktop, Documents, Downloads, Music, Pictures, Videos. Test receipt shown. File name: Test receipt All Files Open Cancel Click on the **'upload receipts'** button. This will open a window allowing the user to navigate to the folder where their receipt was saved. Once the relevant file has been chosen the receipt will display in the receipts window. Double click on the receipt to match to your claim.
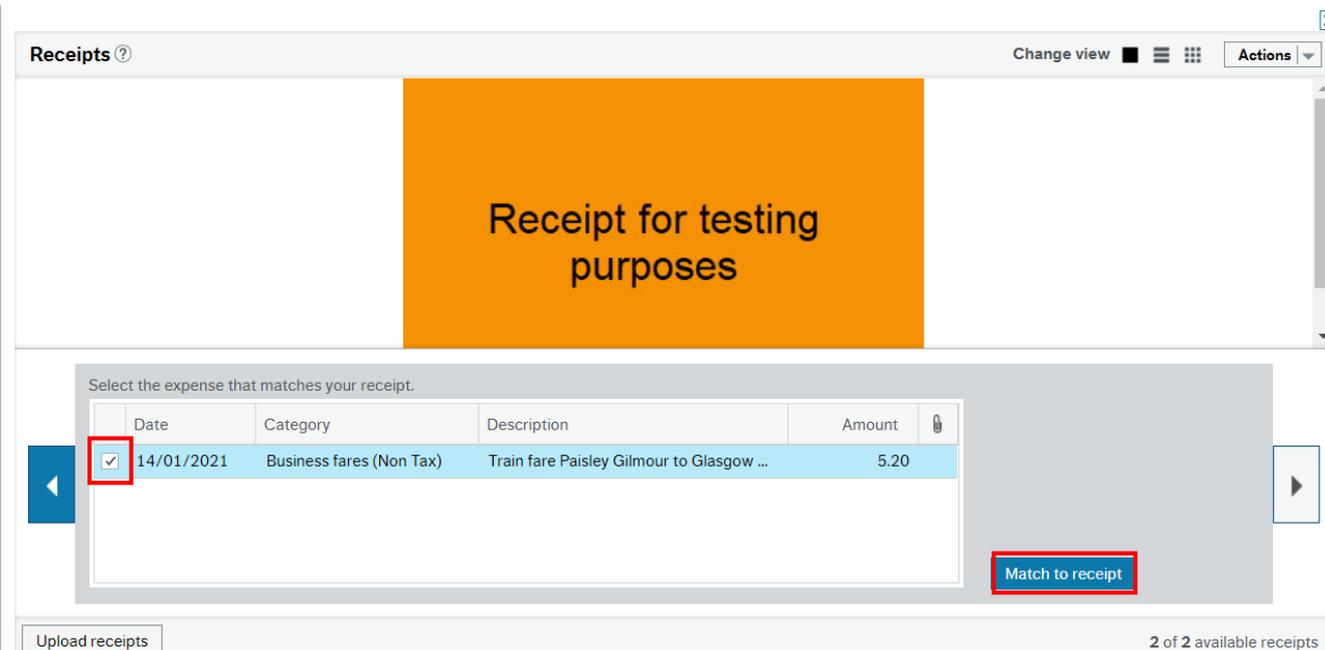
8	Receipts ⓘ Change view ■ ≡ ⊞ Actions ▾ Receipt for testing purposes Select the expense that matches your receipt. |	Date	Category	Description	Amount 📎
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✓	14/01/2021	Business fares (Non Tax)	Train fare Paisley Gilmour to Glasgow …	5.20	 Match to receipt Upload receipts 2 of 2 available receipts Once you have opened the receipt you wish to match, click on the tick-box of the claim you wish to match the receipt to and then click **'Match to receipt'**. A grey summary box is displayed when matched. The receipts window can now be closed.

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10	Send for approval Save as draft View expenses	To submit your claim for approval, click on the **'Send for approval'** button at the bottom of the screen. Your claim will now workflow to your line manager based on the position hierarchy for approval.
9	**Success** ✕ Time and Expenses 13/10/2020 is now sent for approval. Transaction number 900092174. OK	A **'Success'** pop up box will appear with a unique Transaction Number. Select the **'OK'** button to close the pop-up box.

For system enquiries, networked users should contact the support team by using the ICT self-service portal. Non-networked users should contact the support team by emailing businessworld@renfrewshire.gov.uk **or alternatively call us on 0141 618 3500.**