



WELCOME TO USING UERP

Before we begin there are a few important points to note:

The screens and menus you have access to may not be identical to those shown below. Your access will depend on which roles you have been granted.

You have approximately 20 minutes of inactivity in UERP to input your expense before the system times out, and logs you off. Don't worry though, as long as you click in a field within 20 minutes you will be safe for another 20!

If you have problems inputting your expense please contact the UERP Helpdesk at ubw@uea.ac.uk.

You can use any Internet browser but need to ensure that you either allow popups from finance.uea.ac.uk or that it is set as a trusted site.

If you aren't connected to the wired UEA network (so using Wi-Fi or off campus for example) then you need to connect to the UEA's VPN at vpn.uea.ac.uk before you can access the UERP website.

If you are claiming a mileage expense please enter the postcodes for the places you travelled from and to in your description.

Now let's get started...

Opening UERP

To start entering your expense claim into UERP you first want to open UERP. UERP can be accessed via the Internet, there is even a handy link near the bottom of My UEA called Finance System. Failing that open up your chosen Internet browser and navigate to the address <https://finance.uea.ac.uk>



Want to access UERP? You will find a handy link near the bottom of My UEA. **Or go to finance.uea.ac.uk**

Depending on your connection speed you will be quickly taken to the UERP login screen. You need to either be on the UEA wired network to access UERP or connected to the VPN at vpn.uea.ac.uk. If you have issues with the VPN you will need to contact the IT Service Desk who will get someone to help you. Unfortunately the UERP Helpdesk are unable to resolve VPN issues.

A screenshot of the UERP login screen. It features the UNIT4 logo at the top with the tagline 'In business for people.'. Below the logo are three input fields: a large empty box for the username, a smaller box labeled 'Client', and another smaller box labeled 'Password'. At the bottom of the form is a blue 'Login' button.

The UERP Login Screen. Found by navigating to the UERP website. <https://finance.uea.ac.uk>

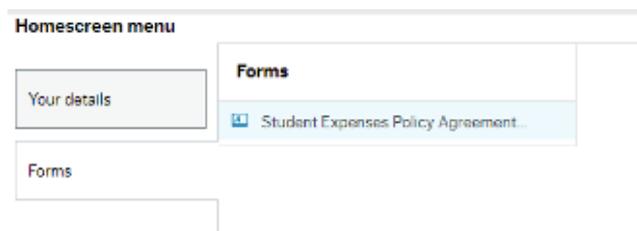
Logging in is simple as long as you have an active UERP account set up. Pop in your UEA username and password (the same way you would when logging onto any UEA domain PC). **Do NOT put @uea.ac.uk at the end of your username otherwise UERP will refuse your login!** Finally ensure that the domain is typed in as UEA. Once that's all filled in click on the Login button. All going well you will be presented with the UERP Menu page.



Logged in successfully? You should see the UERP Homescreeen Menu. **Similar to the image above.**

First time logging in?

If this is your first time logging in to claim expenses you will need to agree to the expenses policy agreement, and confirm your payment details before being able to claim. Under the **Forms** heading will be the option called **Student expenses policy agreement....** Click on this to open the policy form. If you have agreed to the policy previously please go to page 6.



Before you can claim you need to agree to the expenses policy. This can be found under **Forms**.

To read the expenses policy you can click on the **Link** button under **Expenses Policy**. This will open the required webpage for you so that you can read the policy. Once you have read the policy click on the box under **Tick here** and finally click **Submit form** at the bottom of the screen.



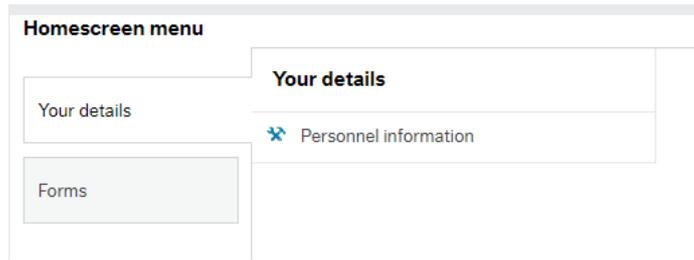
Make sure you read the Expenses policy by clicking the Link. Tick the box and **Submit form** once you have.

With the policy agreed to you now need to move on to entering your payment details in UERP. Click on the Menu button, in the top left, to return to the **Homescreen Menu** in UERP. Or close the Policy form by clicking on the (x).



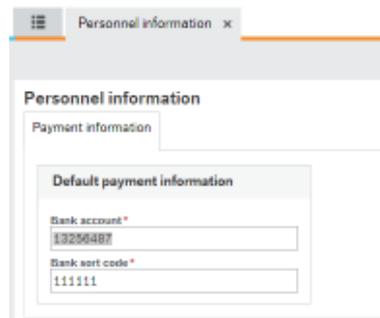
Agreed to the Policy? Close the Policy tab or click on the Menu button. **It's time to enter your payment details.**

Click on the **Your Details** menu item to display the option called **Personnel Information**. Now click on **Personnel Information**.



You want to click on Your details. This will show you the **Personnel Information** option.

Once the **Personnel Information** screen has opened you will have two fields to fill out. **Bank account** and **Bank sort code**. Carefully enter your bank information in these fields. This is where your expenses will be paid to.

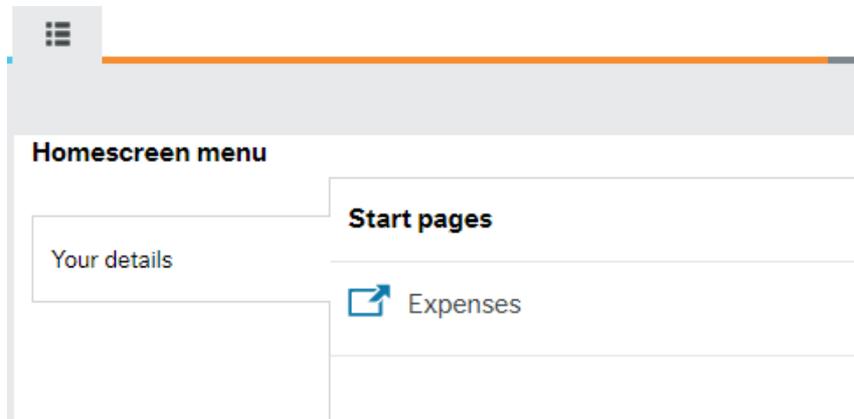


Type your bank details into the two fields. Ensure this is correct. **This is where your claim will be paid to.**

Click **Save** at the bottom of the screen once you have fully entered your details. You won't be able to claim right away as UERP needs to process these details. This can take up to 30 minutes. You will receive an email from UERP once your access has been granted. At which point you can log in and start claiming.

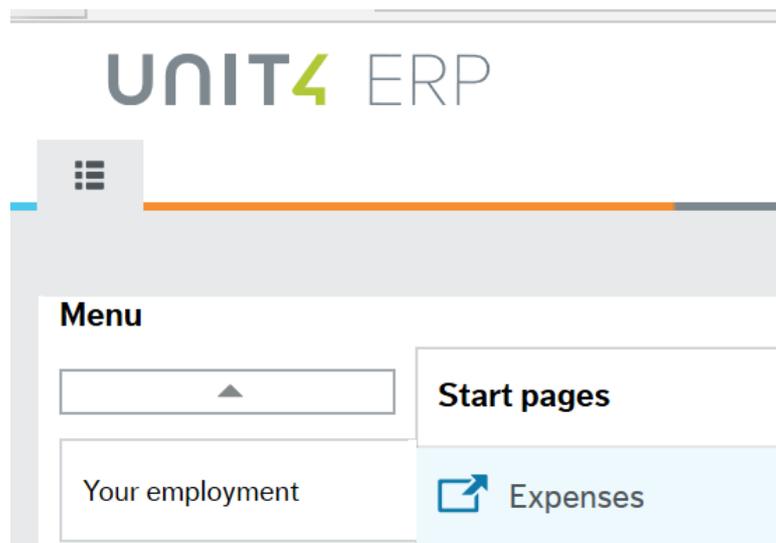
Inputting your expense claim

This guide will help you with inputting a claim for your expenses in UERP. Once you are logged in you will have the Menu displayed on the left side of the screen. One of these should be called **Your Details**. This is where you want to go to get started. Select **Your details** clicking on it.



Wondering where to start? Click on the **Your details** menu item in the left panel.

Anything related to **Your details** will now be displayed in the centre panel. You should have a section called **Start pages**. Under **Start Pages** will be an option called **Expenses**. Go ahead and click on **Expenses**.



Start pages is the section you need. Just click on **Expenses** under that heading.

In the **Expenses** section of UBW there is a section called **Expenses - New expense claim**. This is where you want to go. Under this section click on the **Student Expenses/Advances** button.



In the Expenses section? You want the button **Student Expenses/Advances**. **This sits under New Expense Claim.**

Once the screen opens you need to detail your expense so that it can be approved and processed for you. The first field to fill out is your destination under the header of **Country expense incurred in**. This field is a drop down field, so just select from the list the place you travelled to.

A screenshot of a form titled 'Details of claim' in a light grey header. Below the header, the text 'Country expense incurred in' is positioned above a dropdown menu. The dropdown menu is open, showing 'United Kingdom' as the selected option. A small downward-pointing arrow is visible on the right side of the dropdown box.

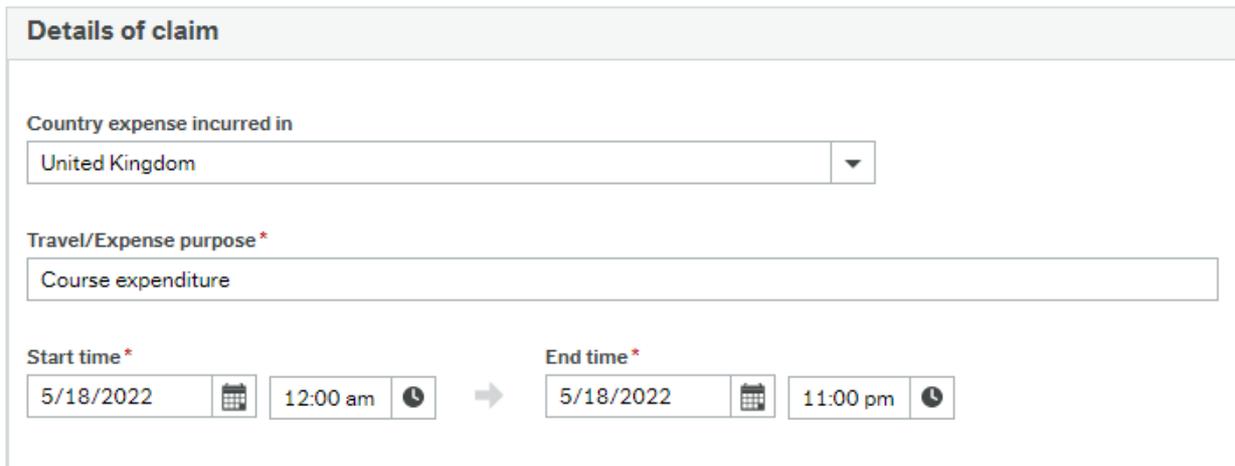
Where did you go? That's your starting point. **Select the country from the Country expense incurred in drop down.**

After selecting your destination you need to provide the reason for your journey. Whether it's a meeting, course, etc... Just state the reason why in the **Travel/Expense purpose** field.

A screenshot of a form titled 'Details of claim' in a light grey header. Below the header, the text 'Country expense incurred in' is positioned above a dropdown menu. The dropdown menu is open, showing 'United Kingdom' as the selected option. Below this, the text 'Travel/Expense purpose*' is positioned above a text input field. The input field contains the text 'Course expenditure'.

So you picked your country. Now say why you went. **Type the reason into the Travel/Expense purpose box.**

When you have filled out the reason for your travel you need to state the date range for your expenses. So go ahead and enter the date of your first receipt. Then do the same again for when your final receipt. You don't need to worry about the time fields. The only time you need to change these is if your start and end dates are the same day. If this is the case then simply set the **End time** as something other than 00:00.



Details of claim

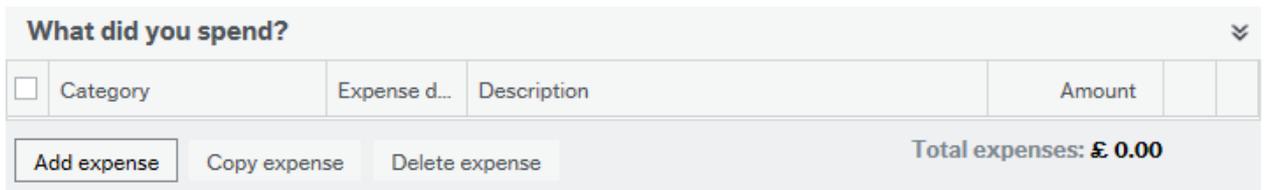
Country expense incurred in
United Kingdom

Travel/Expense purpose *
Course expenditure

Start time * End time *
5/18/2022 12:00 am → 5/18/2022 11:00 pm

Specify the start and end date of your receipts next. Select them from the **Start/End time** fields.

With your destination, reason for travel, and the dates and times entered you need to specify what expense you are claiming. So while staying on the same page you need to find the **Add Expense** button. This sits down at the bottom of the screen. Just below where it says **What did you spend?**. Go ahead and click on it.



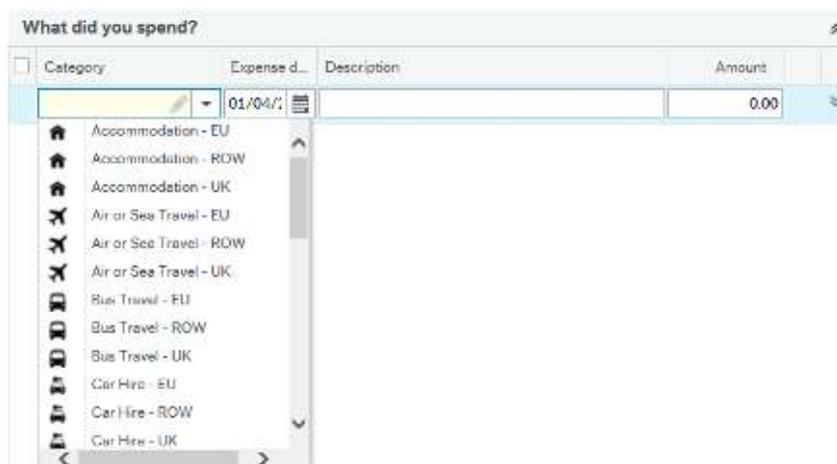
What did you spend?

Category	Expense d...	Description	Amount

Add expense Copy expense Delete expense Total expenses: £ 0.00

What is the expense you are claiming? Click on **Add expense** to select what it is you are claiming.

Once you click on the **Add expense** button the screen will update and give you the chance to state what your expense was for. First thing to do is select the category your expense relates to under the **Category** drop down.



What did you spend?

Category	Expense d...	Description	Amount
01/04/2022			0.00

- Accommodation - EU
- Accommodation - ROW
- Accommodation - UK
- Air or Sea Travel - EU
- Air or Sea Travel - ROW
- Air or Sea Travel - UK
- Bus Travel - EU
- Bus Travel - ROW
- Bus Travel - UK
- Car Hire - EU
- Car Hire - ROW
- Car Hire - UK

It's time to list your expenses. Select from the **Category** drop down what you want to claim.

With your category selected you want to specify the date that your expense claim is for. So the date that you made the purchase or trip that your expense relates to. Simply type the date into the **Expense date** field.

What did you spend?	
<input type="checkbox"/> Category	Expense date ▲
<input type="checkbox"/> 🚗 Mileage - Car - First 150 miles of round...	13/01/2021

What is the date on your receipt? Type this into the **Expensedate** field. **Or select the date from the handy calendar.**

The category you selected will determine what you need to specify in the **Description** field. What you need to type will handily be requested by the default description displayed by UBW. Just overtype the default entry with your own details. For example **Mileage** will ask you to enter a start postcode and end postcode for your journey. Or if you selected **Meals**, say where your meal was!

What did you spend?		
<input type="checkbox"/> Category	Expense date ▲	Description
<input type="checkbox"/> 🚗 Mileage - Car - First 150 miles of rot ▼	13/01/2021 📅	NR47TJ to BA219AP

Describe what you are claiming for. Type this in the **Description** field. **Make sure you overtype the UERP default.**

If you have selected **Mileage** as your category you will need to enter the number of miles for your trip. Enter this in the **Quantity** field. If you have selected a different category this field will be set as read only and you don't need to enter anything.

Please note - if the mileage for your trip exceeds 150 miles for the same trip you will need to enter two claim lines. One for the first 150 miles using the **Category** - "**Mileage - Car First 150 miles**", and then a second claim line for the remaining mileage with the **Category** - "**Mileage - Car OVER 150 miles ROUND TRIP**".

What did you spend?				
<input type="checkbox"/> Category	Expense date ▲	Description	Quan...	Amount in GBP
<input type="checkbox"/> 🚗 Mileage - Car - First 150 miles of rot ▼	13/01/2021 📅	NR47TJ to BA219AP	150.00	67.50

Selected mileage for your claim? Type in the amount of miles as a quantity.

The **Amount** field is again determined by your selected category for what you need to enter. If you selected mileage this field will auto populate with the defined value that UEA reimburses per mile travelled. Any other category requires you to type in the value of your expense claim. If you select a different currency UBW will work out the exchange rate for you based on the current rates in the system.

What did you spend?					
Category	Expense date	Description	Quan...	Amount in GBP	
Mileage - Car - First 150 miles of rot	13/01/202	NR47TJ to BA219AP	150.00	67.50	

Type in your expense cost in **Amount**. Unless it's a mileage claim. **This is automatically filled out.**

As you fill in your expense claim you should be able to see the **Travel expenses** section to the right of the screen filling up with the information you have submitted. The total will show the full amount of your expense claim as you add more items.

Expenses	
To go for a meeting United Kingdom 13/01/2021 - 13/01/2021	
Type	Amount in GBP
NR47TJ to BA219AP	67.50
Total	£ 67.50

To the right will be a running total of all your expenses. Displayed like a receipt for everything you are claiming.

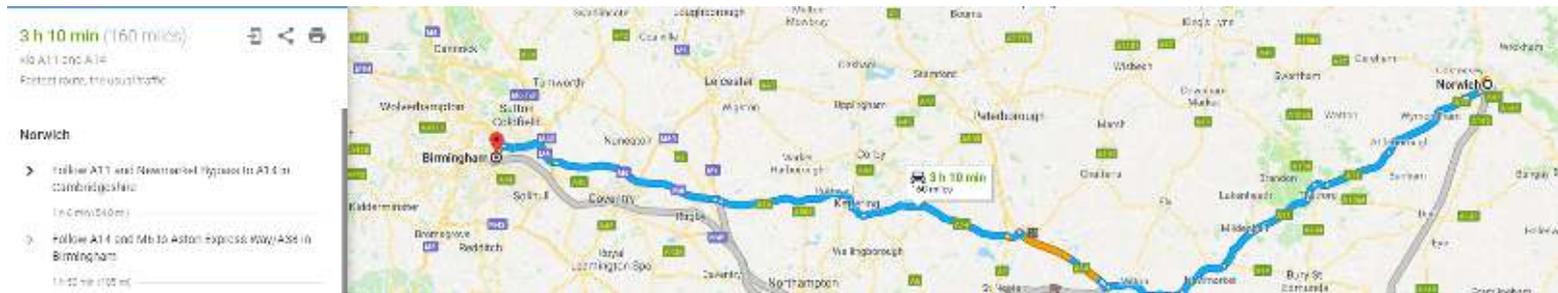
If you have any additional expenses to add on you just need to click on the **Add expense** button at the bottom of the **What did you spend?** window. This will add in an extra line. You just fill out the fields in the same way as just described.

What did you spend?					
Category	Expense date	Description	Quan...	Amount in GBP	
Mileage - Car - First 150 miles of round...	13/01/2021	NR47TJ to BA219AP	150.00	67.50	
Bus Travel - UK	13/01/2021	Bus to hotel		5.00	
Coffeeshop - UK	13/01/202	Coffee	0.00	2.50	

...nses: **£ 72.50**

Got more than one expense to claim? Click on the Add expense button at the bottom.

With all of your expenses detailed and entered you need to go ahead and upload your receipts. Also attach a map image of your journey from Google Maps if it's a mileage claim.



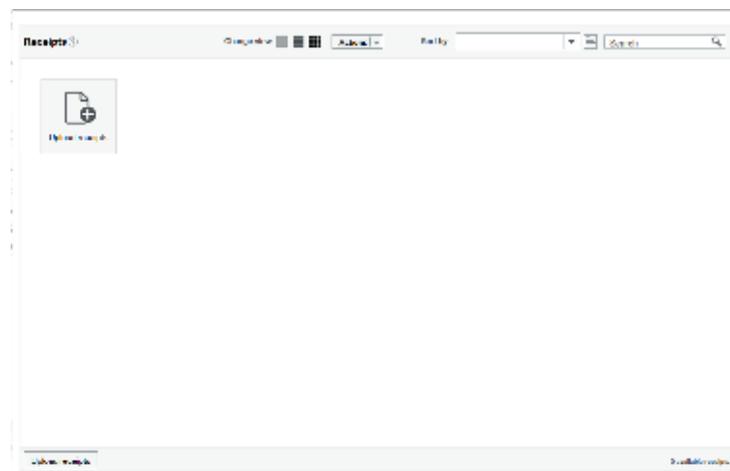
Claiming some mileage? Attach an image from Google Maps of your journey.

To attach your receipts/images you need to click on the **Upload receipts** button which sits in the **Receipts** section in the top right of the **Expenses** screen.



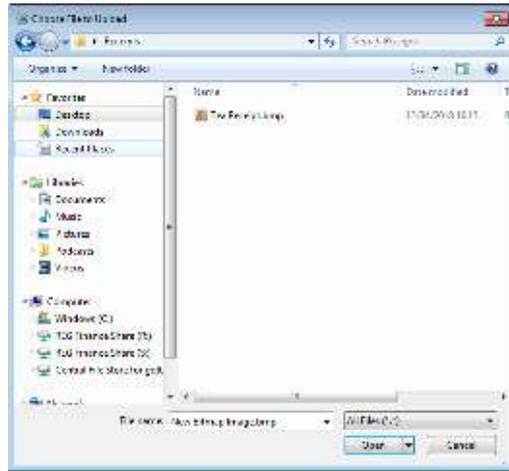
You need to upload receipts. Click on the **Upload receipts** button. **It's in the Receipts section in the top right.**

The **Receipts** window will open up allowing you to attach any receipts you have. These should already be scanned and saved on your computer before you start the claim. One button will appear in the **Receipts** window. It's called **Upload receipts**. Click on this to get started.



In the Receipts window is one button Click on **Upload receipts** to get started.

Your operating systems **File Explorer** will open up now. You just need to go to the location where you have saved your receipt on your computer. Either in a special folder you have created for them or your desktop. Once you have found it select it and open it up.



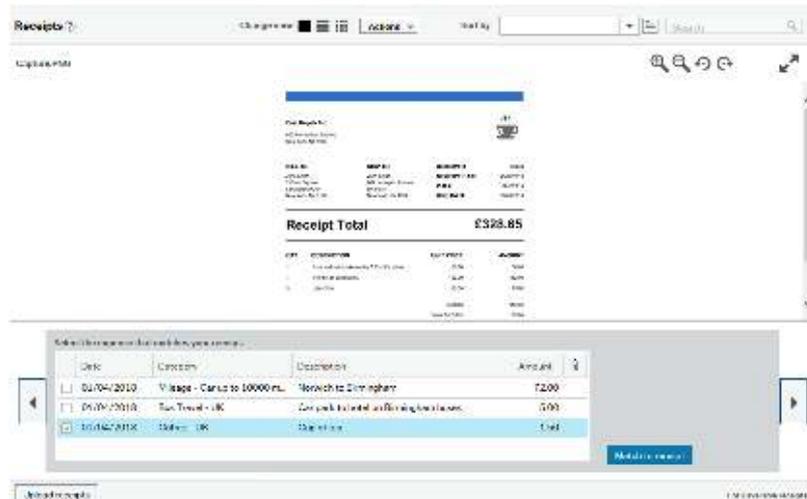
Whatever your operating system the File Explorer window will appear. Find the location of your receipt.

If your receipt has been added in correctly it will appear in the **Receipts** window. Continue adding as many receipts as you need to in the same way. Also don't forget to add in your map as previously stated for your mileage claim.



Add in as many receipts as you have. Once they are added they will appear in the **Receipts** window.

Once you have uploaded all of your receipts you need to match them to your expense. Double click on your receipt that you want to match up. This will open a zoom view of your receipt so you can see it more clearly. There will also be a section below your receipt image asking you to select the expense your receipt relates to. Tick the box for the line of your expense and then click on the **Match to receipt** button to complete the matching process. Once again, also do this for each receipt you have uploaded. Such as matching your journeys map to your mileage claim.



Double click on a receipt to start matching it. Then tick the box for what the receipt relates to. **Click Match to receipt to match it.**

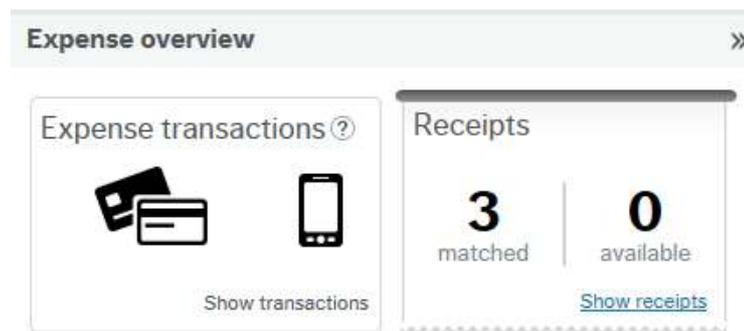
When your receipt is matched the screen will tell you this has been finished. You can always undo this if you have accidentally selected the wrong expense. Just click on the Undo button and carry out the previous step again.

To move to your next receipt image to match click on the arrow icons and match in the same way. If you are entirely happy all receipts are matched to an expense claim then you can close the window by clicking on the little cross (x) symbol in the top right of the **Receipts** window.



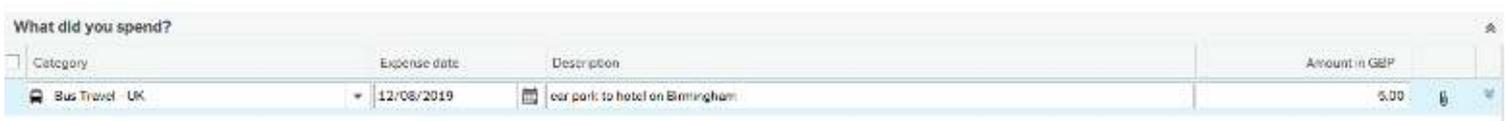
If you have more than one receipt you can just click through them. Click on the arrow buttons to open the next receipt that needs matching.

Now you are back in the **Expenses** window you should be able to see how many receipts you have matched. If you have any receipts that aren't match and need doing these will appear in the **Available** column.



Have you matched everything? There should be a 0 in the **Available** column. **If not go back in and match them.**

Before you can complete your expense claim and send it for approval you just need to specify your chargecode that your claim is against. To do this you need to expand the line of your expense by clicking on the downward arrow symbol next to the paperclip icon.



Click on the arrows next to your expense. This will expand this section. **It allows you to enter in your chargecode.**

The fields that require information will have a handy red asterisk next to them. This should be the **Chargecode** field. In the **Chargecode** field go ahead and type in the chargecode where you are charging your expense to. You need to do this for each line of your expense claim in the same way. If the code is the same for each expense, simply click on the **Apply to all** button. Doing it for one line only enters data for that selected line.

Category	Expense date	Description	Amount in GBP
Bus Travel - UK	12/08/2019	Car park to hotel on Birmingham	5.00

Cost categories
Chargecode*
Apply to all

Type in your chargecode into the **Chargecode** field. Press the tab key once it's entered to store it.

With all of your expenses detailed, receipts uploaded and matched, and all chargecodes entered you should be OK to go ahead and send your expense for approval. This is incredibly simple to do. Just go ahead and click on the **Send for approval** button at the base of the screen.

Category	Expense date	Description	Quantity	Amount
Mileage - Car...	01/04/20...	[Please enter Start and End Points]	180.00	72.00
Bus Travel - UK	01/04/20...	Car park to hotel on Birmingham buses		5.00
Coffee - UK	01/04/18	Cup of tea	0.00	1.50

Total expenses: £ 78.50

Send for approval Save as draft View expenses Print preview Delete Add information

Finished? Look to the bottom of the screen to find the **Send for approval** button. **Just click on it.**

As long as you have done everything correctly and don't have any errors cropping up you will receive a **Success** message box informing you that your expense is on its way for approval. This will also contain a transaction number.

Success

Travel expense 01/04/2018 is now sent for approval. Transaction number 75000023.

OK

Followed all of the steps above? A Success box will appear. **Along with your transaction number.**