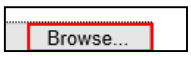
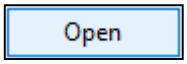
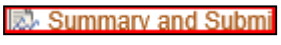
Expenses – Claiming for Meals

The example that follows will show how to create an expense claim for a meal expense.

Step	Action
1.	Click on **Expenses Claims** via the link on **Staff Portal** via the Nest
2.	Type in your computer username in the **User ID** field and enter your **Password**
3.	Click on the **Sign In** button
4.	Select **Create/Modify Expense Reports** from the left hand side of the screen
5.	Click the **Add** button.
6.	Input the date the expense was incurred
7.	Click the **Expense Type** list.
8.	Select the **Meals Local Travel** from the list.
9.	Enter a valid **Description** e.g. "**Lunch while at Waikato Uni meeting**".
10.	*NOTE: Once you have selected **Meals** - or any entertainment type expense – an additional link named **Attendees** is made available.* If you are claiming for lunch for a group of people, you must list them here. Click the **Attendees** link.
11.	*NOTE: Your name will already appear as an attendee* Click the **Add a new row at row 1** button to include the other people who may have shared the meal for which you are claiming the expense.
12.	The format for this is **Lastname,Firstname** e.g. "**Smith,Ian**".
13.	Enter the name of the company or organisation the person works for into the **Company** field.
14.	Repeat from step 11 to include other attendees
15.	When complete - Click the **OK** button.
16.	Click in the **Amount** field and Enter the value of the receipt
17.	Click the **Attachments** button to add your receipt.

Step	Action
18.	Click the **Add Attachment** button.
19.	Click **Browse** 
20.	Navigate to where you have saved an image or scanned file of your receipt, and click to select **receipt file**
21.	Click the **Open** button. 
22.	Click the **Upload** button.
23.	Optional - Enter a **Description** Enter a valid value e.g. "**Lunch at Waikato Uni**".
24.	Click the **OK** button.
25.	The file will have now been attached to the expense line and the attachment icon should look like this
26.	To submit the Expense report for approval . . . Click the **Summary and Submit** link  in the top right corner of the screen.
27.	Click the Submit Checkbox option. ☐
28.	Click the Submit Expense Report button.
29.	Click the OK button.
30.	**End of Procedure.**