SNOMED International Online Expense System zExpense

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Amendment History

Version	Date	Editor	Comments
0.01	20150520	YDA	First draft for comments
0.02	20150527	YDA	Revisions made based on JGK and KNI comments
1.00	20150616	YDA	Current version
1.01	20180210	YDA	Revisions to refresh version

Approvals

Version	Date	Approver	Comments
1.00	20150616	KNI/RDA	

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1 Introduction

This document outlines the instructions for the online IHTSDO expense system (zExpense).

Note:

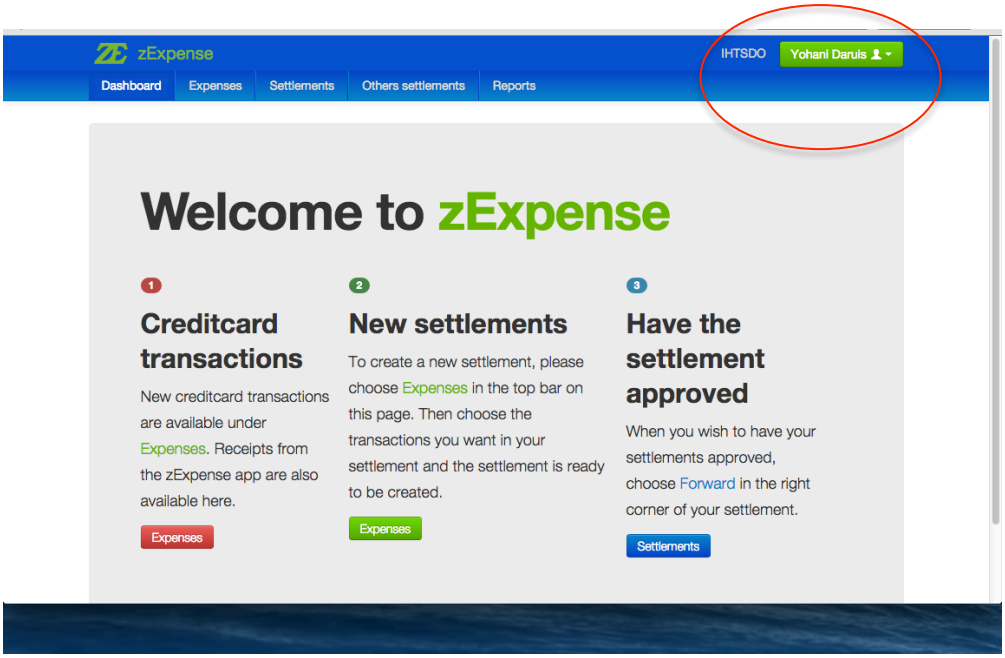
1. Travel expense claims should be in accordance with SNOMED International Travel Policy.
2. Purchases should be in accordance with SNOMED International Procurement Policy.
3. IT related expenses require pre-approval by the Technical Services Executive Lead (see guidance here).

Please do not hesitate to contact Yohani Daruis (yda@snomed.org) if you have any questions.

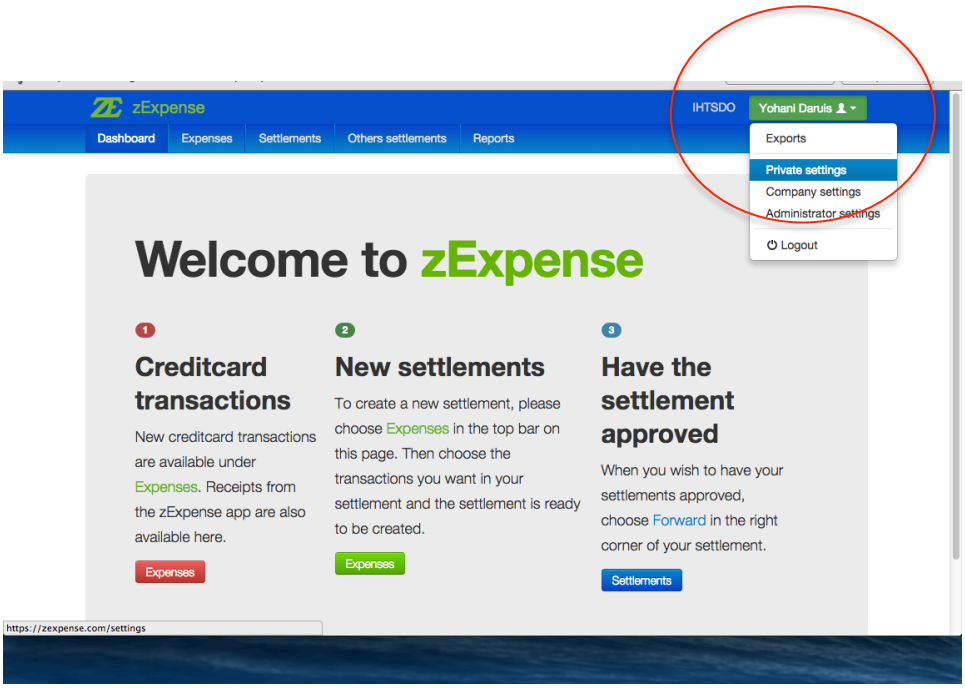
2 Logging on

1. Go to https://zexpense.com
2. User name: email address eg. xyz@snomed.org
3. Password: enter the password sent to you by the Office.

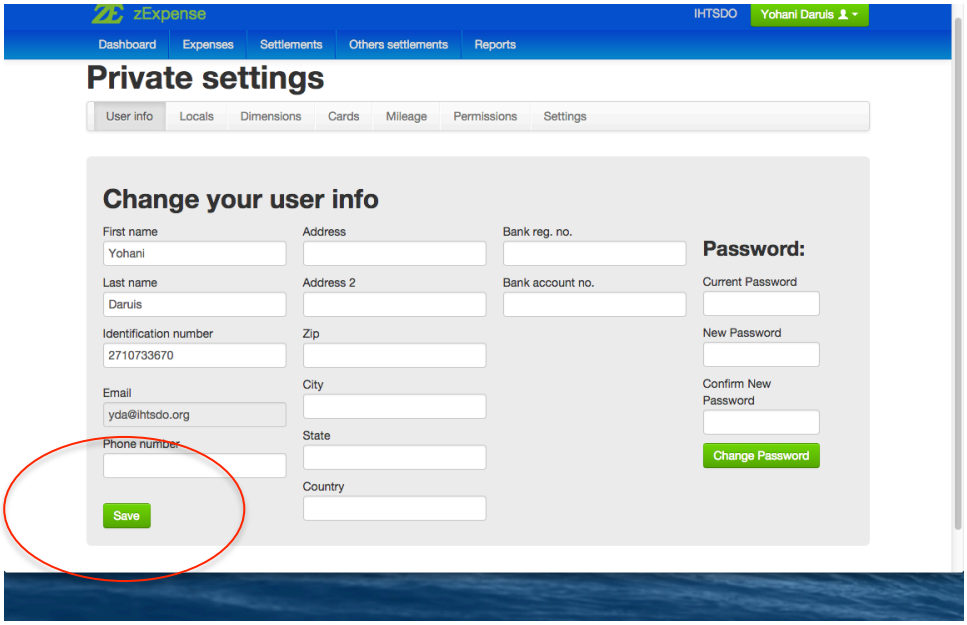
3 Changing password and user information



1. Click on the pull down menu next to your name.
2. Select 'Private Settings'.



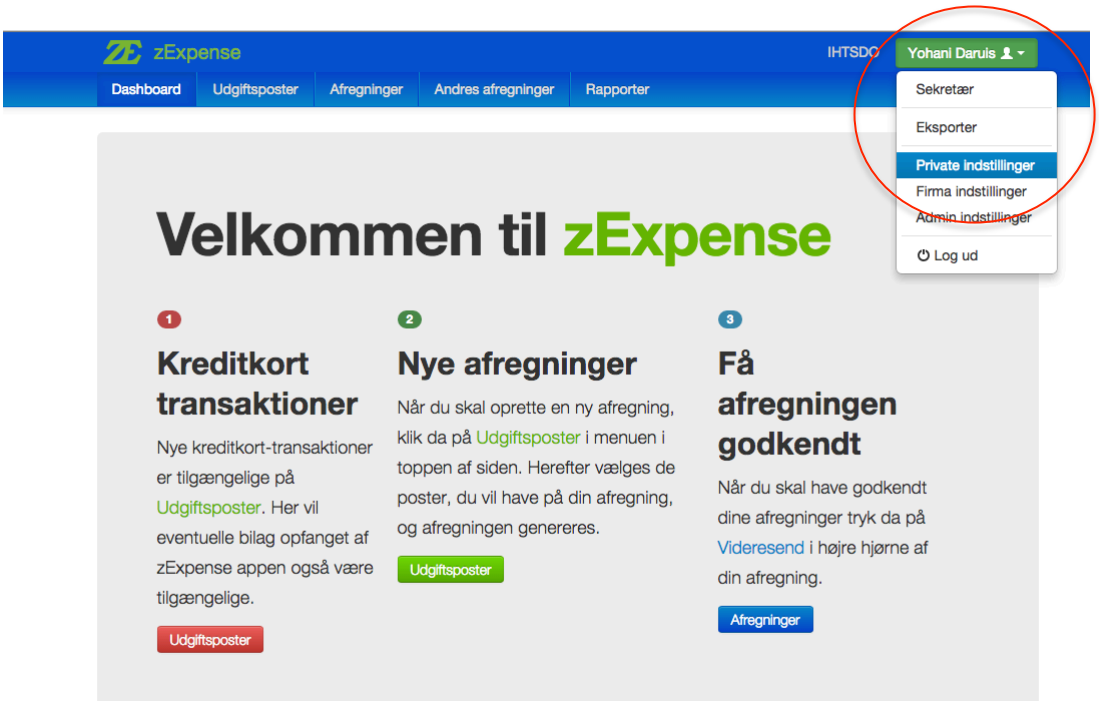
3. Make the desired changes and click ‘Save’.



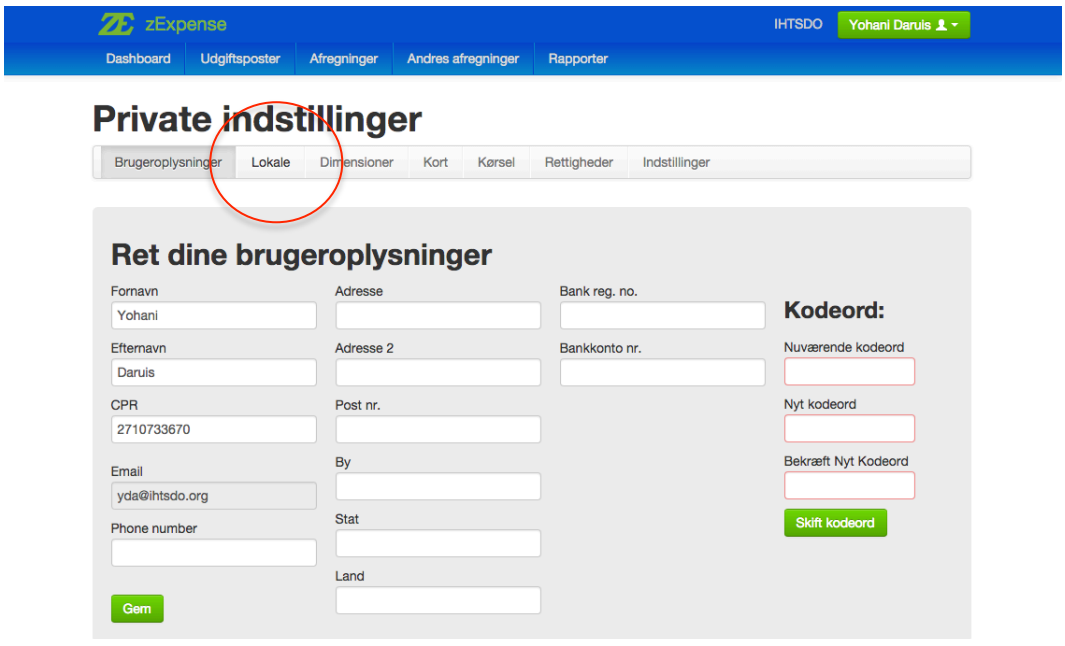
4 Setting language and timezone

Upon logging onto zExpense, you should find English as the default language. However, if you find the landing page is in Danish and would like to change it to English, you should do the following:

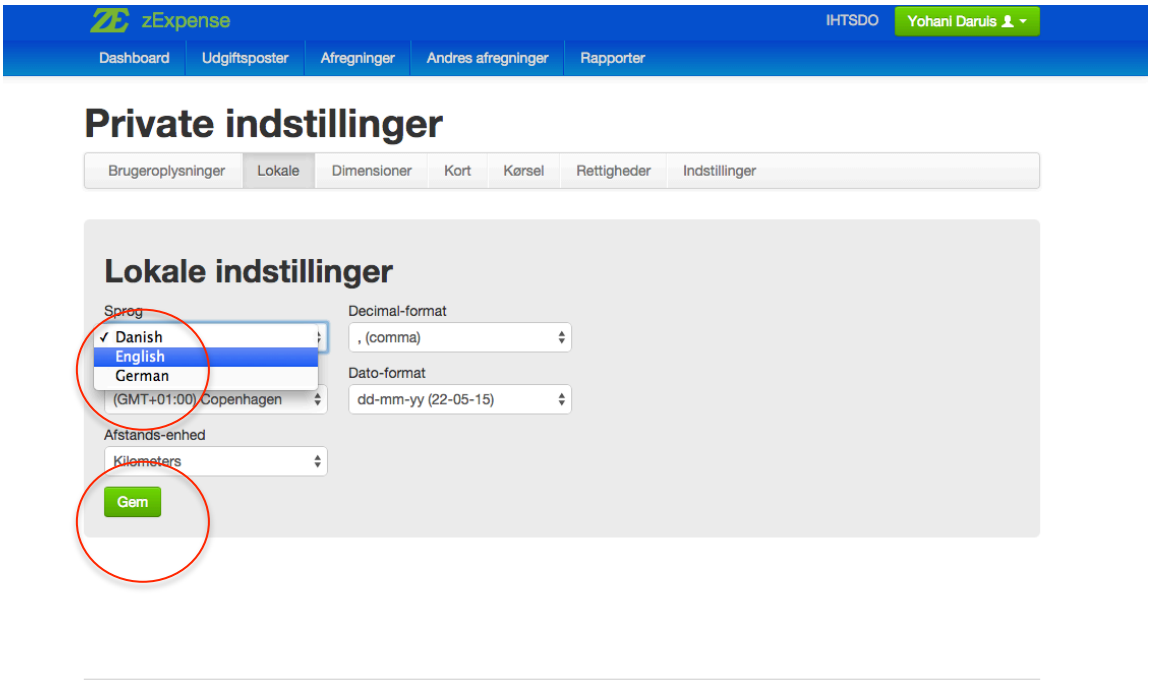
1. Click on your name in the top right, choose “Private Instillinger”.



2. Then click “Lokale” or “Locals”.



3. Then click “Sprog” and select English, then “Gem” or “Save”.
4. To change the time zone, use the Timezone menu to select your location, then “Gem” or “Save”.



5 Scanning and uploading a receipt

Only use **one** of the three options below to upload a receipt onto zExpense.

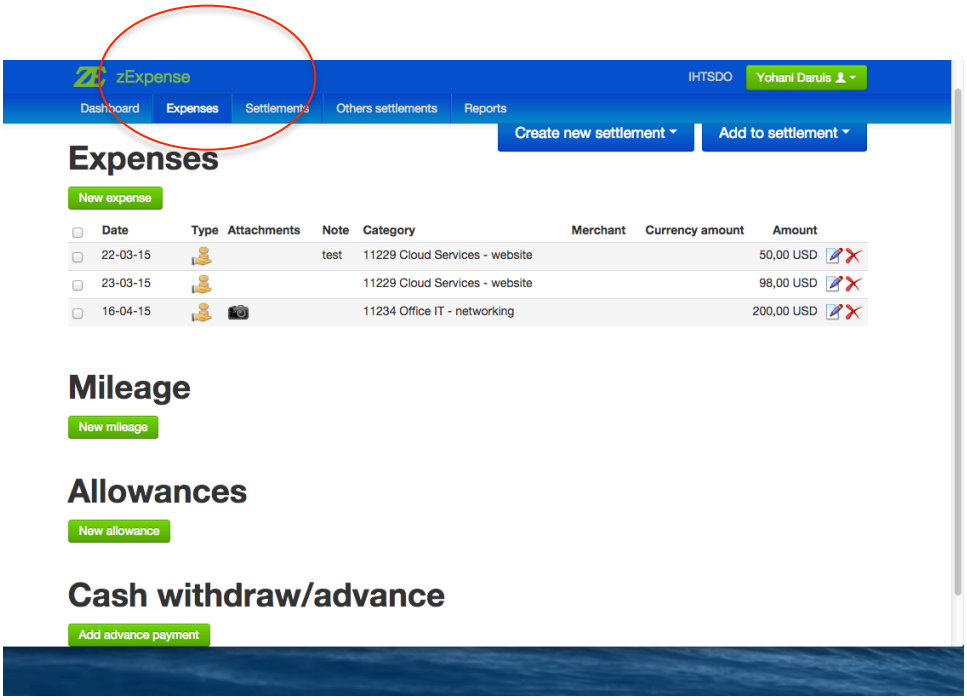
5.1 Option 1: Upload receipts onto zExpense

Scan and save your receipts with the naming convention:

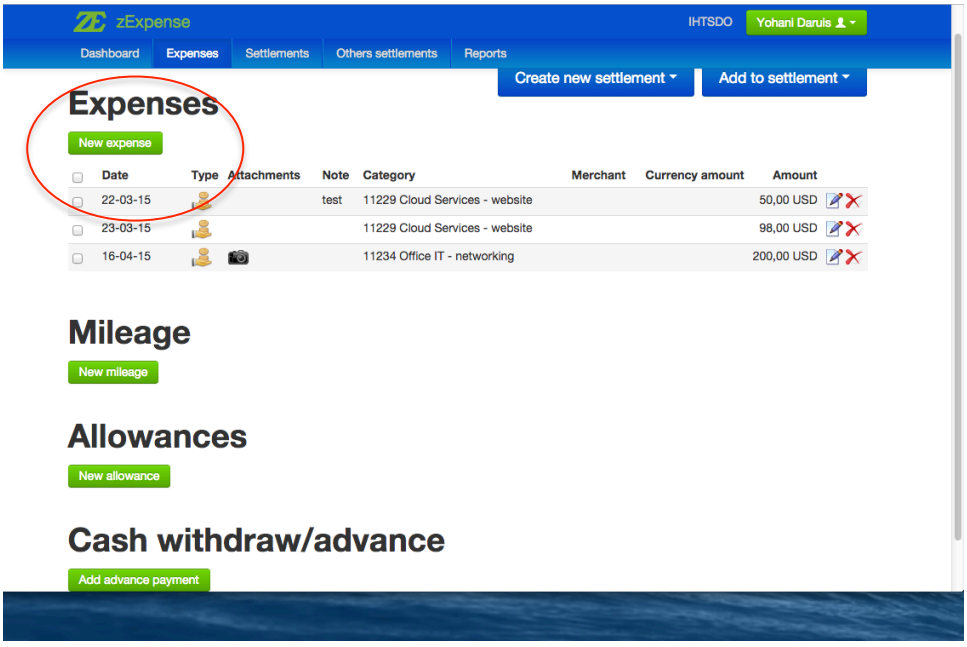
Initials_date(YYYYMMDD)_Description

Eg. YDA_20180210_Office stationery

1. To upload a receipt, click on Expenses

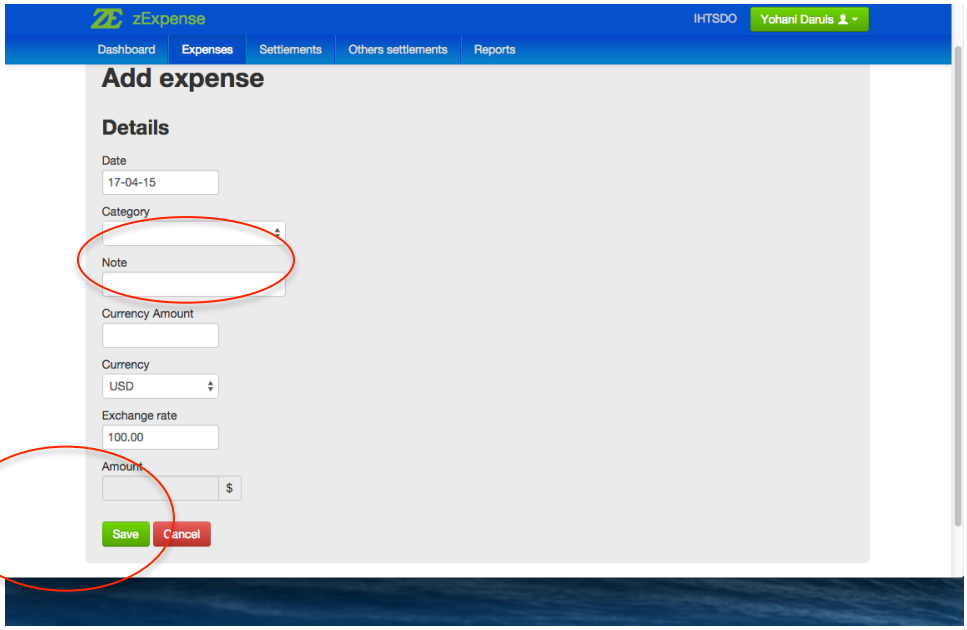


2. Then click on 'New Expense'.

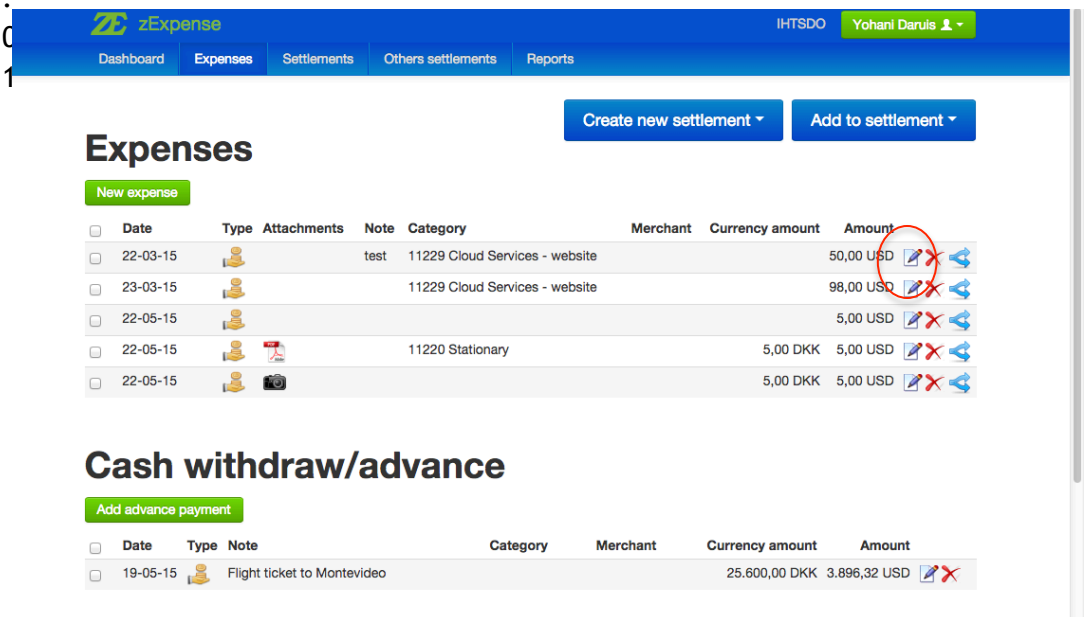


3. Fill in the details as shown on your receipt. Please use the value of currency charged.

4. Select the Category for your receipt claim, e.g. 'Travel expense – April conference' for April conference related expenses.
5. Use the 'Note' feature to describe the expense, e.g. 'Train ticket from London to Birmingham.'



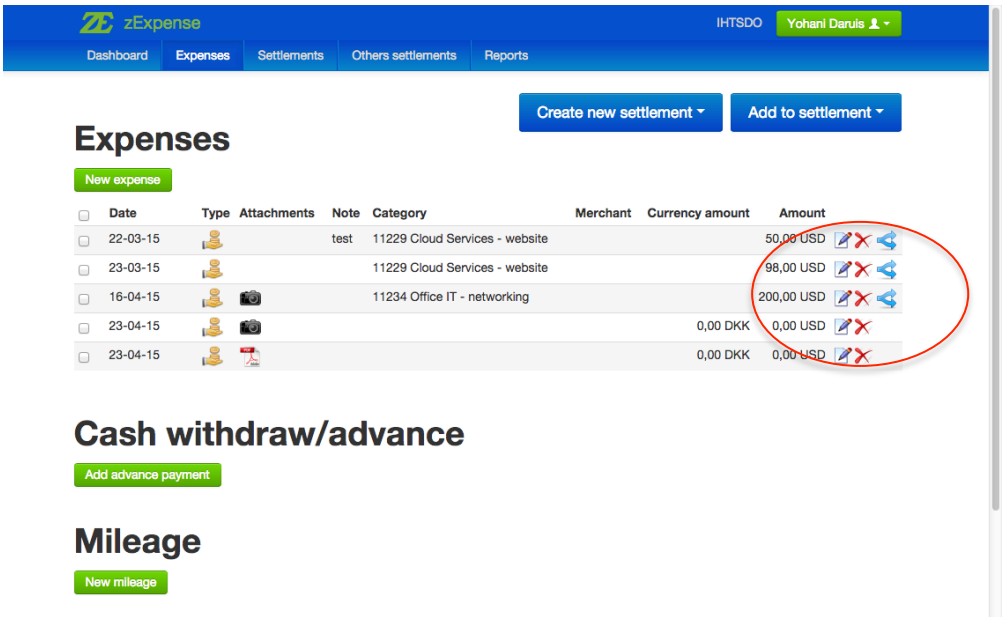
6. When complete, click the 'Save' button.
7. Repeat steps 3 to 6 to enter each receipt claim.
8. Go back into the Pencil icon with that line to upload the receipt.
9.
10
11



9. To edit an entry, click on the Pencil icon. To delete an entry, click on the Red X icon.

5.2 Option 2: Email receipts to receipts@zebon.dk

1. Scan and save your receipts with the naming convention:
   Initials_date(YYYYMMDD)_Description
   Eg. YDA_20180122_Office stationery
2. Email your scanned receipts, (one receipt per email) to receipts@zebon.dk Please ensure that you use your IHTSDO email account, as your email is your user id.
3. zExpense will create a new expense line for each receipt received (refresh the screen).



4. Click on the edit button (Pencil icon) for that receipt line to key in the expense details.

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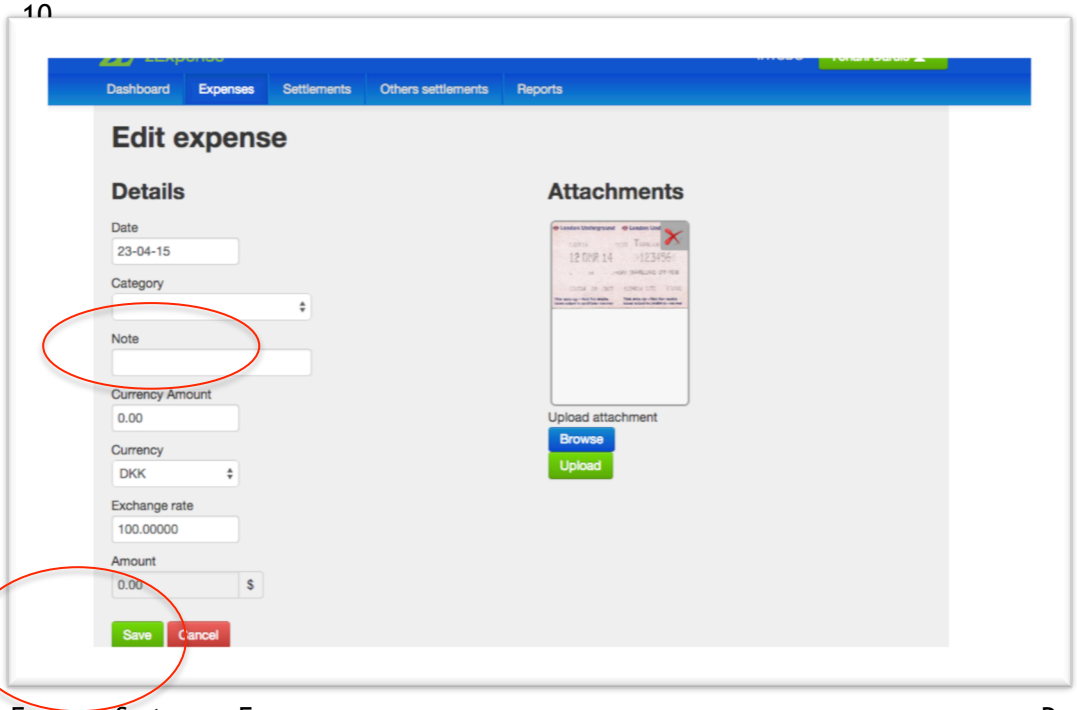
4



5. Fill in the details as shown on your receipt. Please use the value of currency charged.
6. Select the Category for your receipt claim, e.g. 'Travel expense – April conference' for April conference related expenses.
7. Use the 'Note' feature to describe the expense. e.g. Train ticket from London to Birmingham.
8. When complete, click the 'Save' button.
9. Repeat steps 3 to 7 to enter each receipt claim.
10. To edit an entry, click on the Pencil icon. To delete an entry, click on the Red X icon.

5.3 Option 3: Scan receipts using zExpense Mobile App

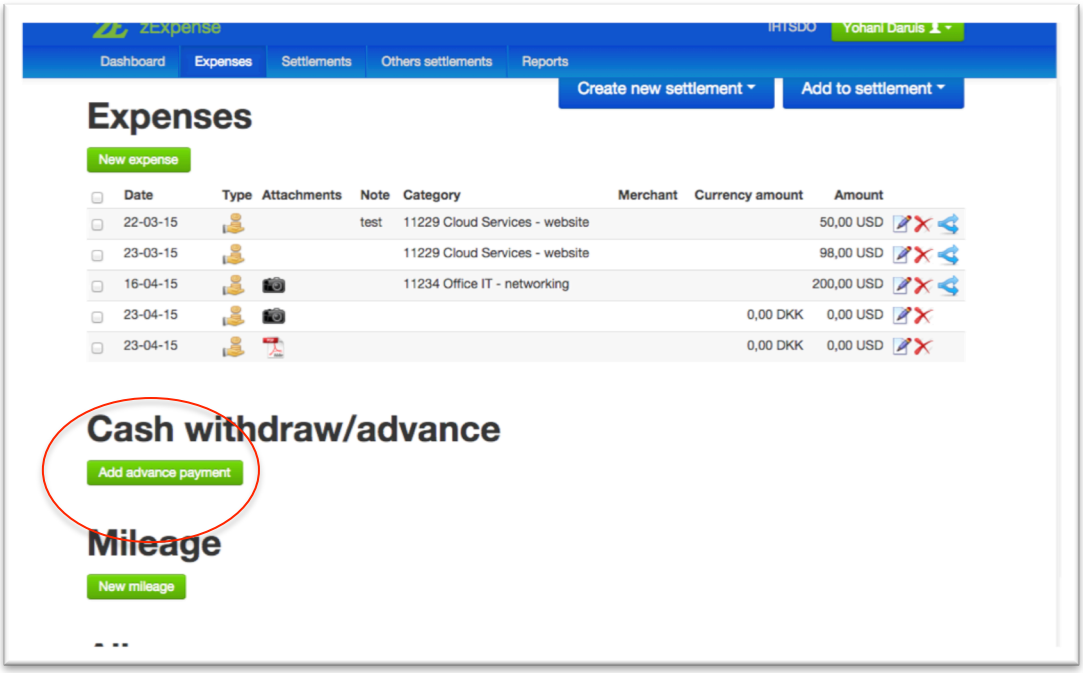
zExpense App

6 Cash withdraw/advance

This feature is used when a cash advance has been made prior to actual purchase. Cash advances require authorization from your Line Manager.

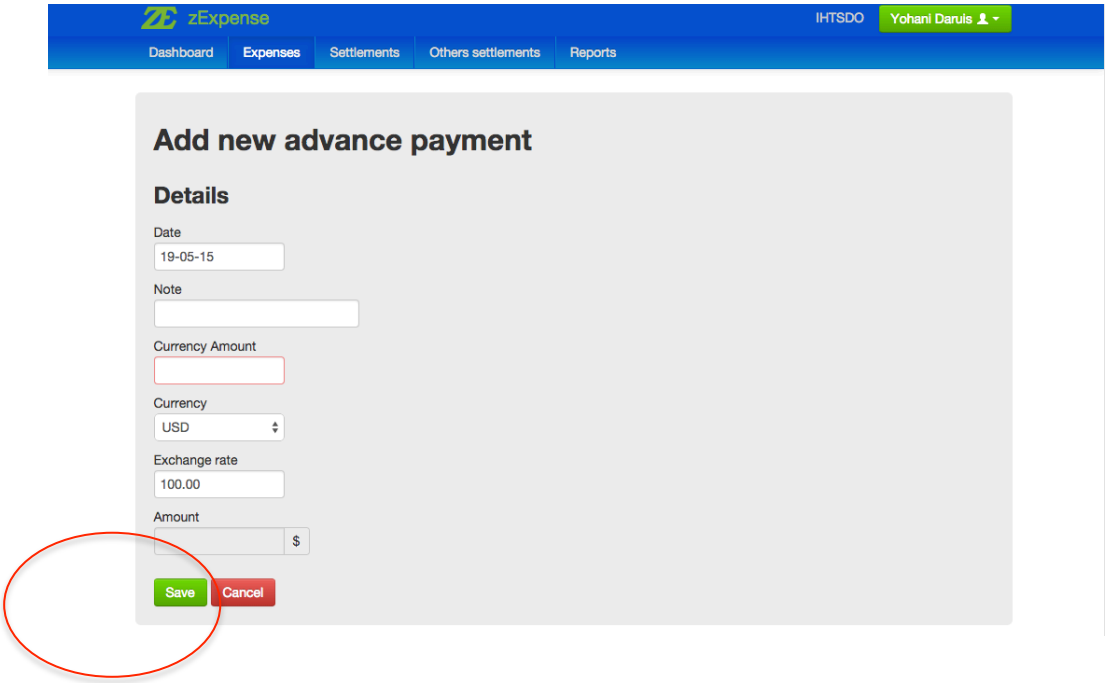
6.1 Entering a cash advance

1. Click 'Add advance payment'

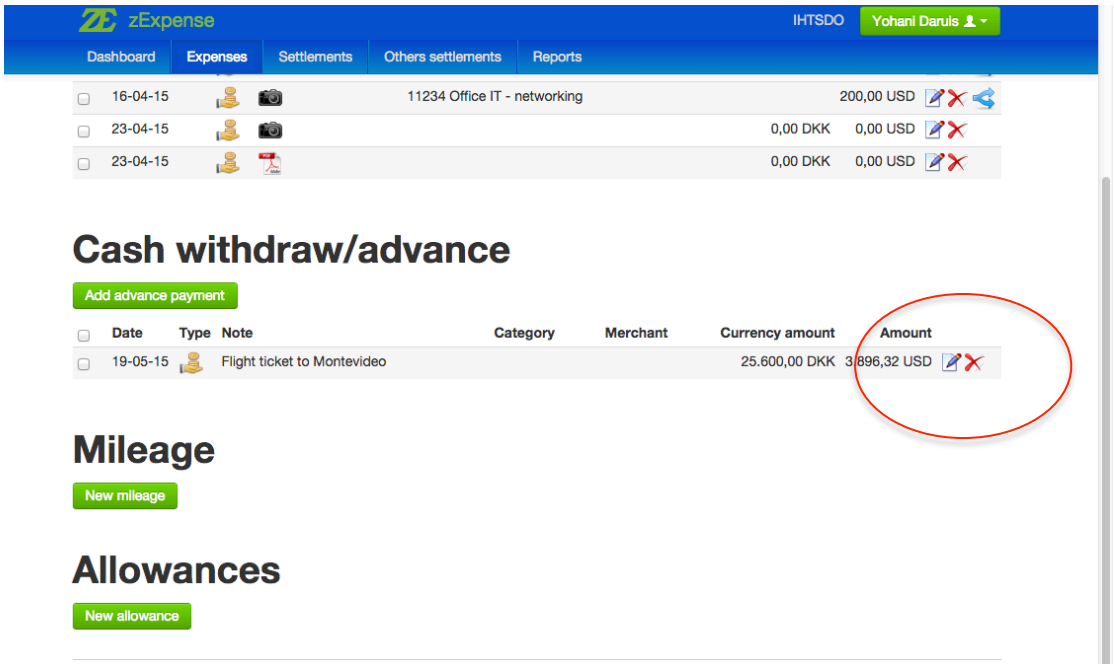


2. Enter details of advance payment, using value and currency as per the actual transfer.

3. When complete, click the ‘Save’ button.



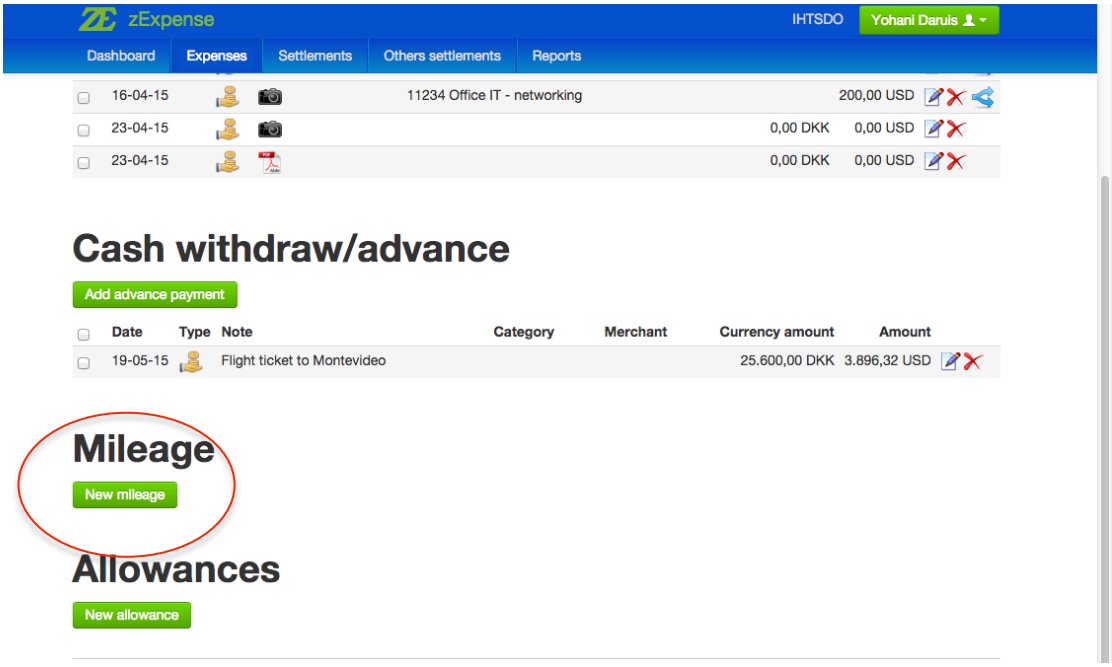
4. To edit an entry, click on the Pencil icon. To delete an entry, click on the Red X icon.



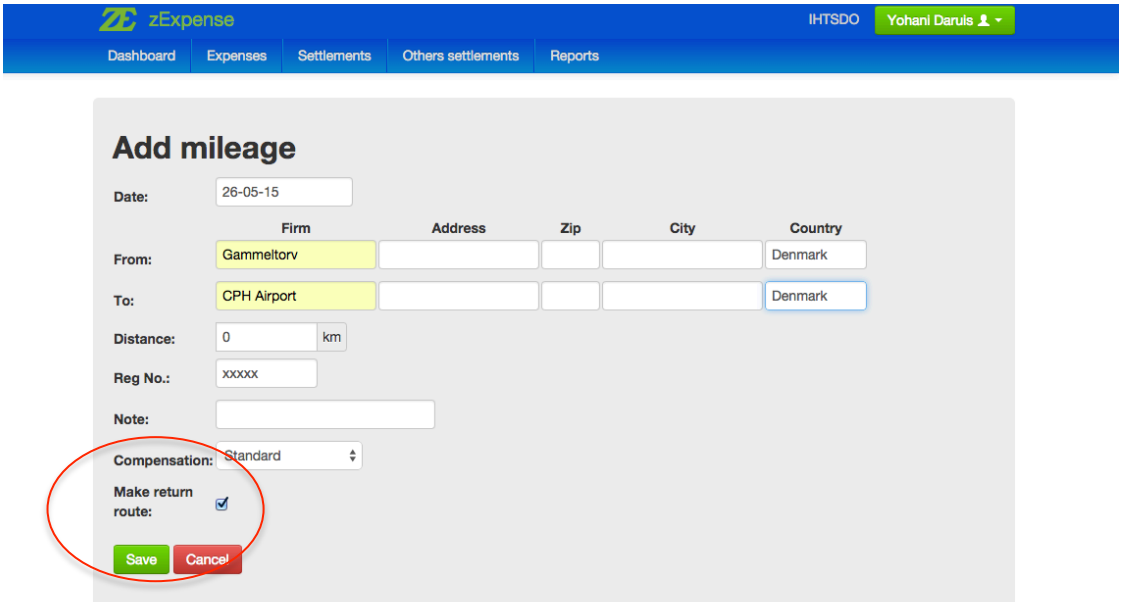
7 Mileage

You may claim mileage, if you have used your private car for business purposes, e.g. external meetings, trips to/from airport, etc.

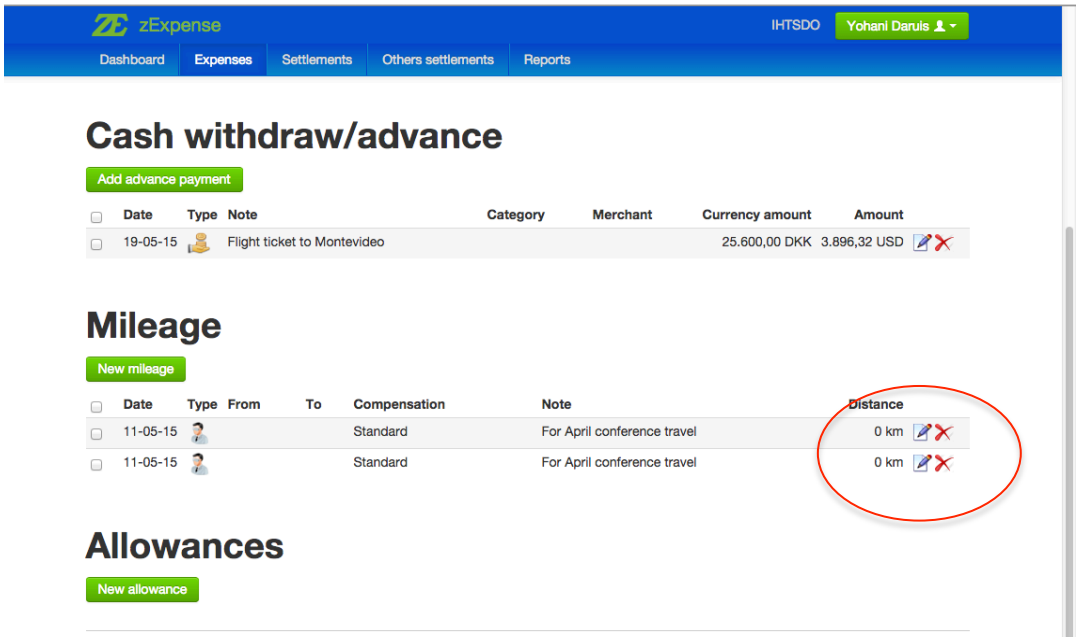
1. To enter mileage for a particular trip, click on ‘New Mileage’.



2. Enter date travelled.
3. Enter from/to and distance in kilometers.
4. The ‘Note’ field should be used to state the reason for travel, e.g. for April conference travel.
5. If you are claiming a return trip, check the ‘Make return route’ box.



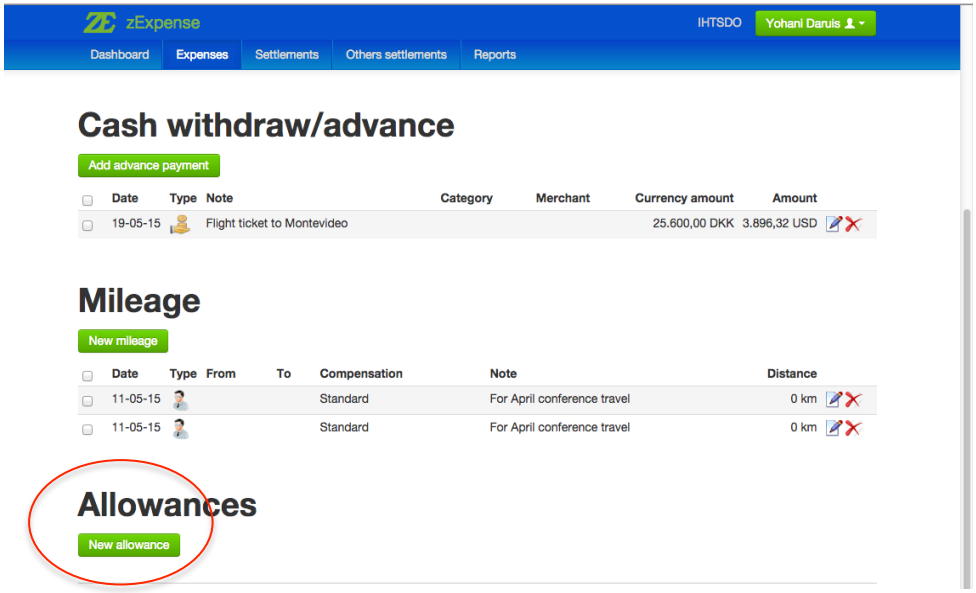
6. *To edit an entry, click on the Pencil icon. To delete an entry, click on the Red X icon.*



8 Allowances

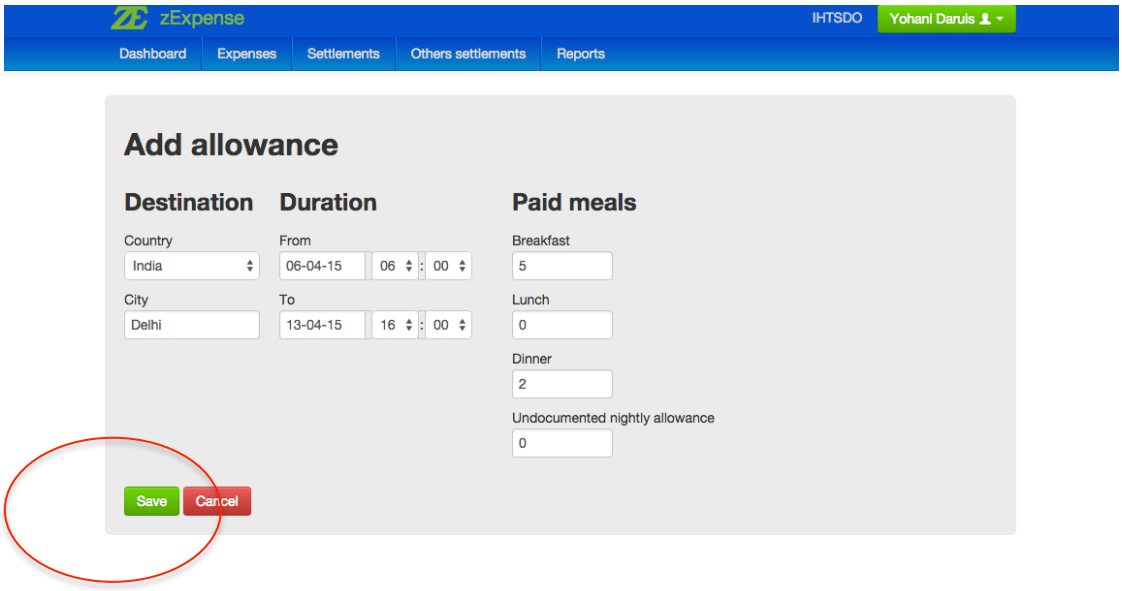
Allowances (per diem) are awarded for trips lasting more than 24 hours and only for travel outside of country of residence. If a trip is less than 24 hours, then meals are claimable per receipt.

Note: Per diem rates are dependent on the destination. If the country you have travelled to is not listed, please contact Yohani at yda@snomed.org

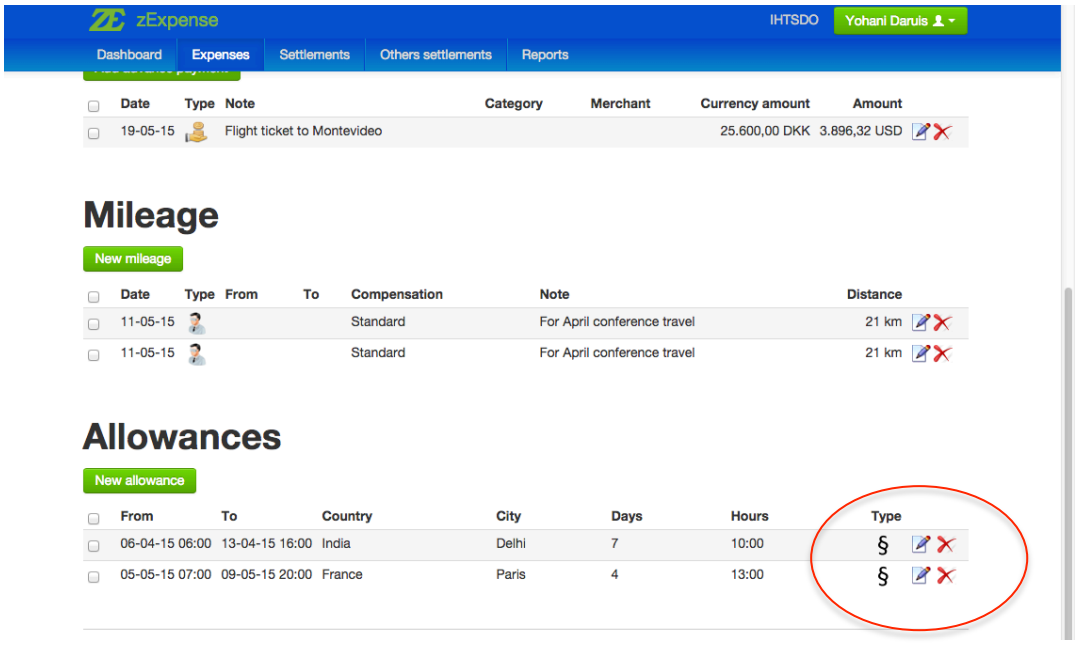


1. To claim per diem for a trip, click ‘New allowance’.

2. Choose country of destination.
3. Enter ‘City’ travelled to.
4. Enter ‘From’ date and time (when you left your home).
5. Enter ‘To’ date and time (when you arrived home).
6. Enter the number of breakfasts, lunches and dinners, which were provided during the trip.
7. When complete, click the ‘Save’ button.

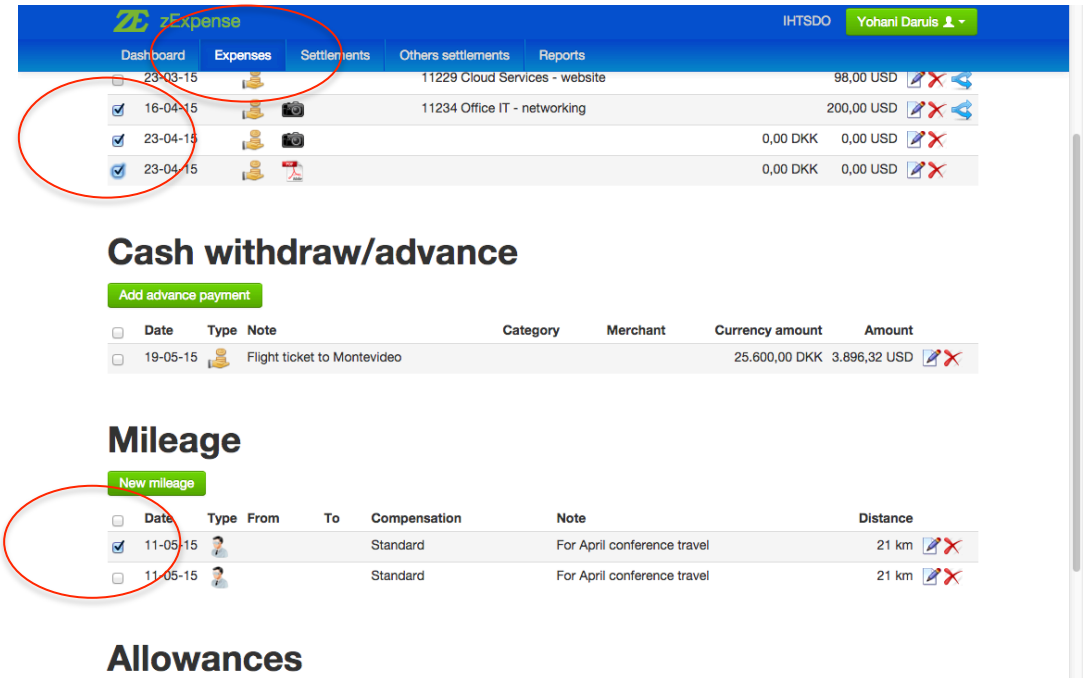


8. To edit an entry, click on the Pencil icon. To delete an entry, click on the Red X icon.

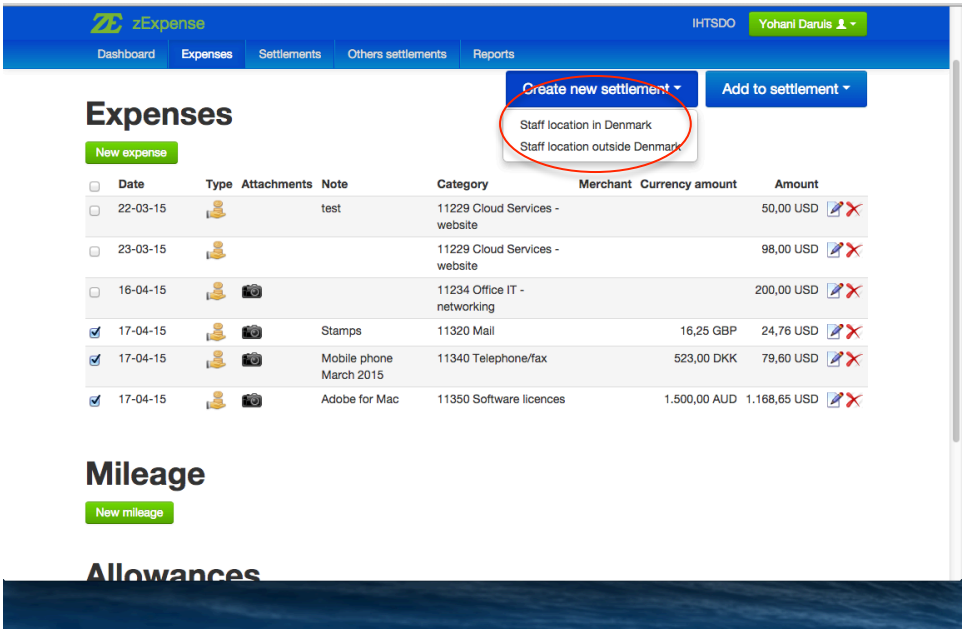


9 Creating and submitting an expense claim

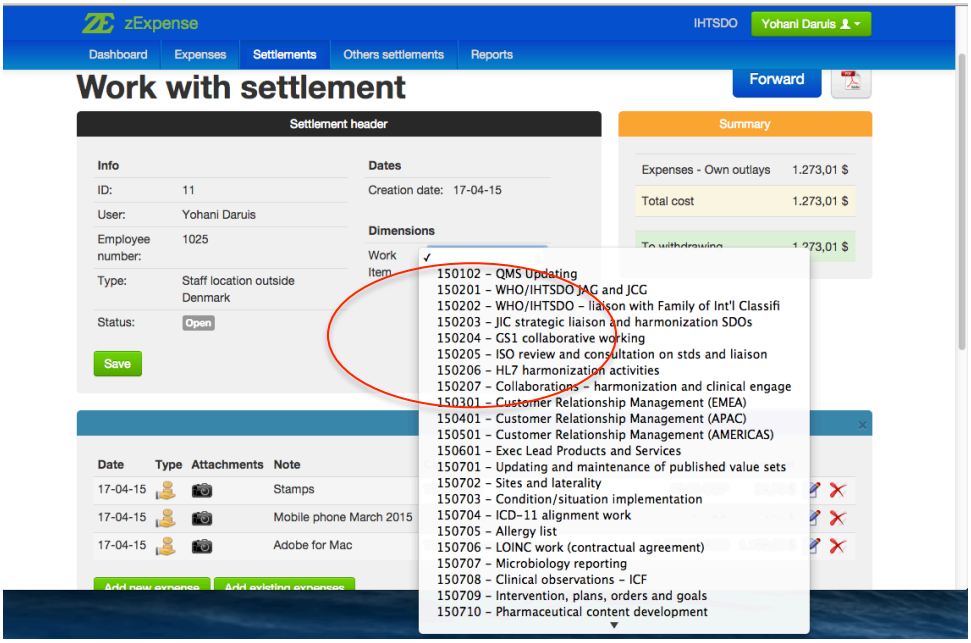
1. Click on ‘Expenses’
2. Tick the entries related to the expense claim. If there are no entries related to the claim, then go to step 3.



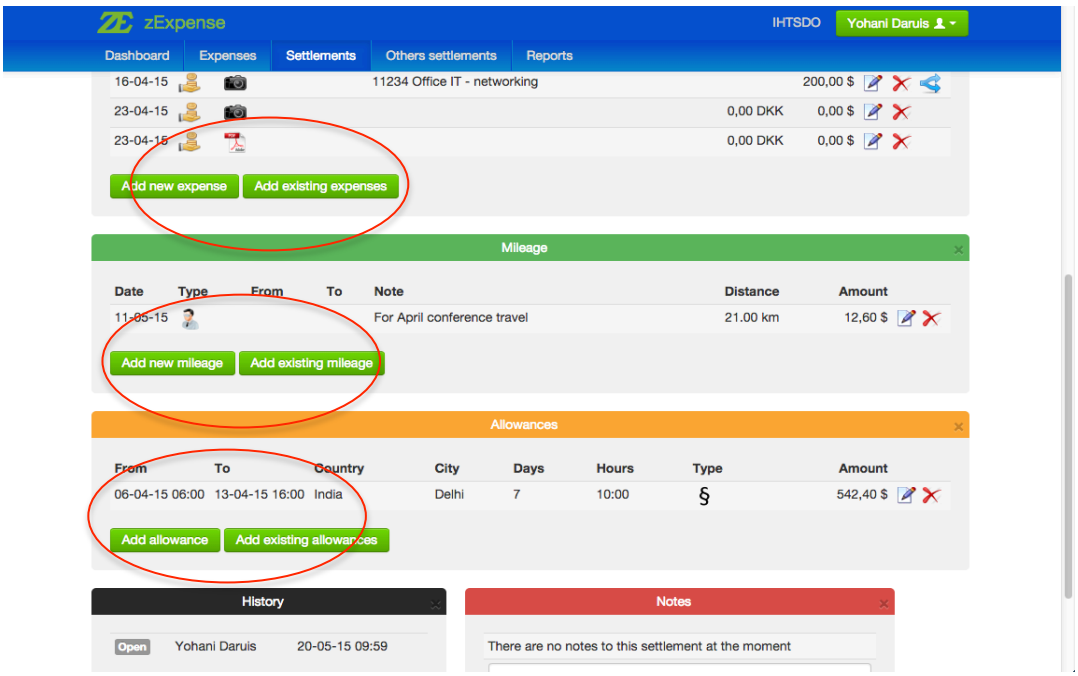
3. Click on ‘Create New Settlement’.
4. Staff residing in Denmark, select *Staff location in Denmark’.
5. Staff residing in Australia, Canada, Sweden, UK or US, select ‘Staff location outside Denmark’.



6. If the claim is Project related, then select the appropriate 'Work Item' dimension code (please confirm with your Line Manager and/or the Budget Holder which code should be used for each claim). You will need to create a separate claim for each dimension used.

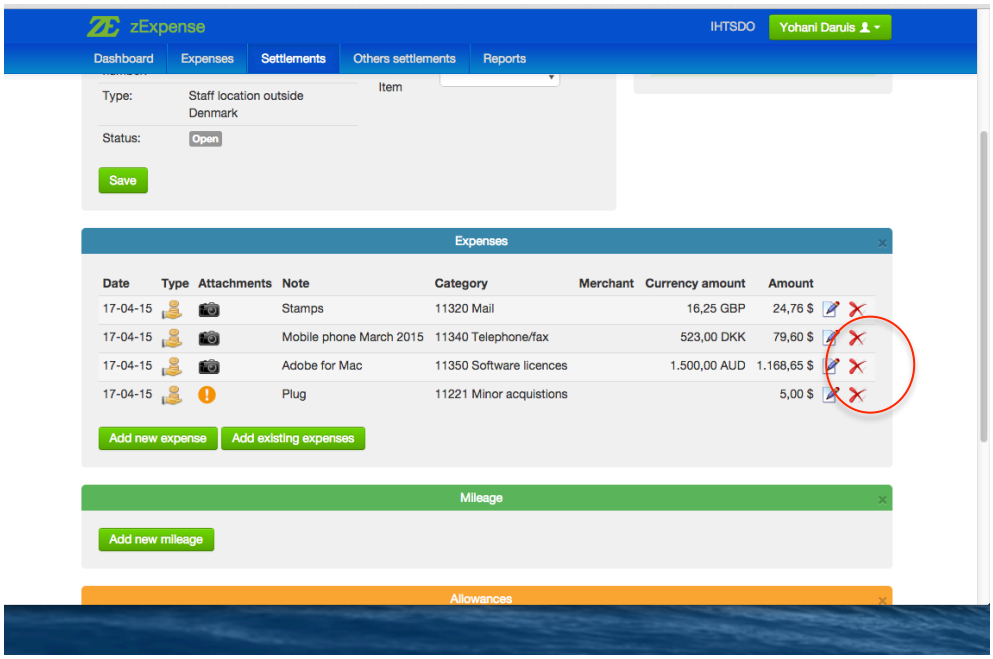


7. You will notice that the receipts you selected earlier are listed in this claim.
8. To add another expense line, click on 'Add new expense'.

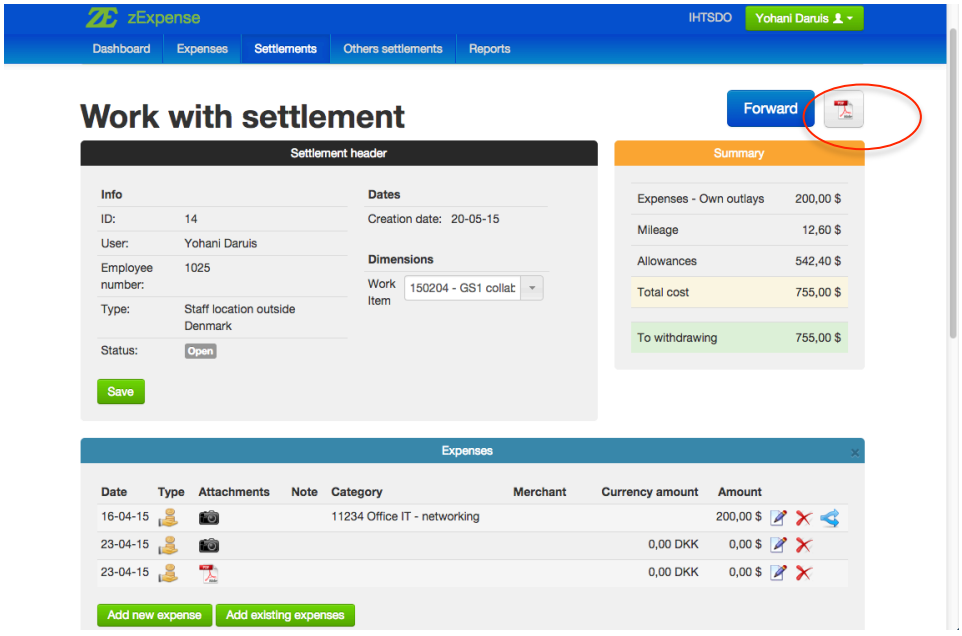


9. If there is an existing receipt that you would like to attach to this claim, click on 'Add existing expenses'.
10. To add another mileage line, click on 'Add new mileage'.

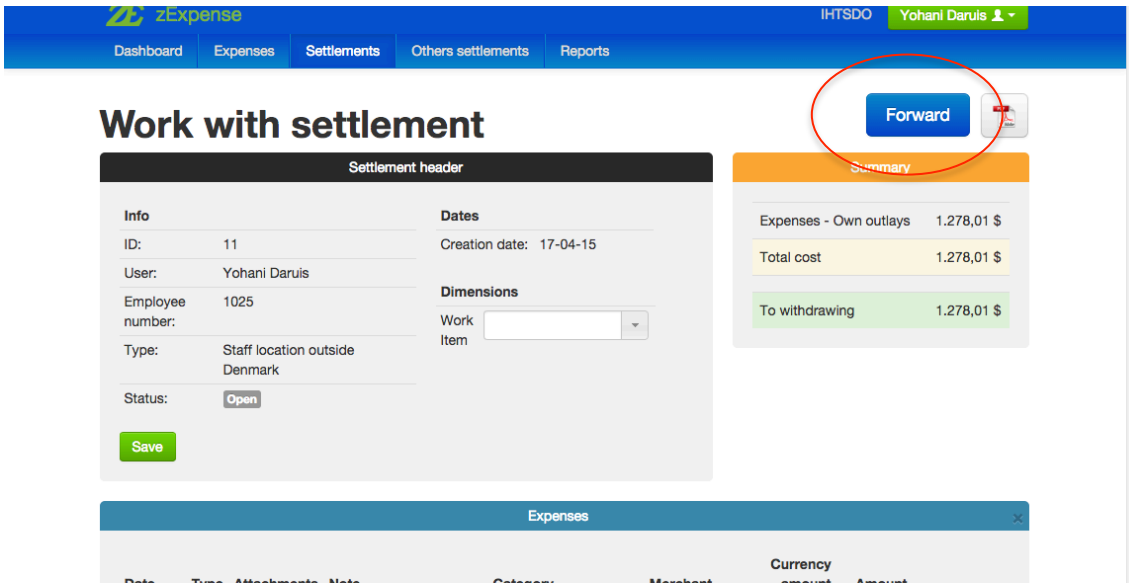
11. If there is an existing mileage entry that you would like to attach to this claim, click on ‘Add existing mileage’.
12. To add another allowance line, click on ‘Add allowance’.
13. If there is an existing allowance entry that you would like to attach to this claim, click on ‘Add existing allowances’.
14. To add an existing expense/mileage/allowance to this settlement, tick the relevant expense line and click ‘Add expenses’/’Add Mileage’/’Add Allowance’. Clicking on ‘Go back’ will not save your changes.
15. To remove an expense line from this settlement, click on the Red X. Note that this action will remove the line of expense from this settlement. It will be moved back to your front page for future use or deletion.



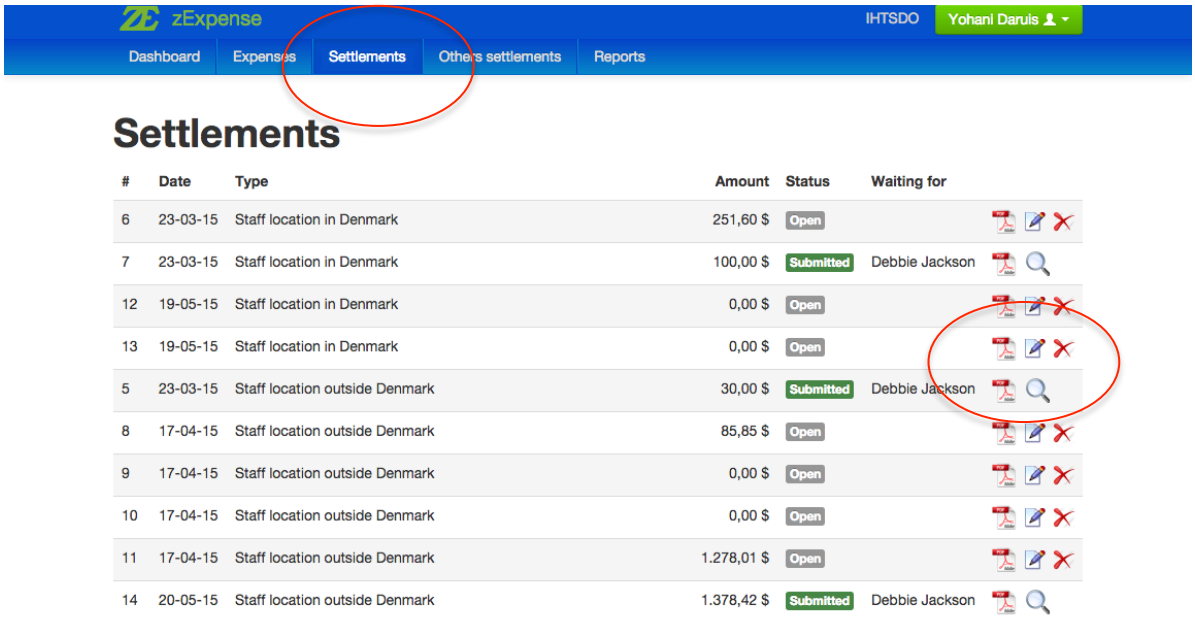
16. To view and/or save your report, click on the PDF icon.



17. When your expense claim is compete and ready for submission, click the ‘Forward’ button.



18. To see an overview of all your expense claims, click on ‘Settlements’.



19. To view the report of your claim, click on the PDF icon.
20. To edit an expense claim, click on the Pencil icon.
21. To delete an expense claim, click on the Red X icon.