



eExpense User Guide

User Guide



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What is eExpense?

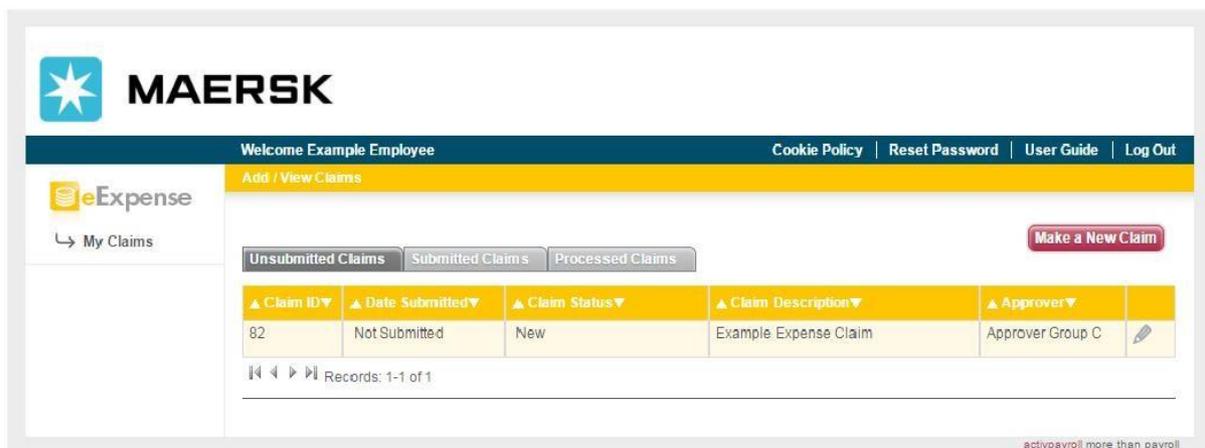
eExpense is the module in activ8 which allows you submit and track your expense claims along with any documentation or receipts which you have scanned to support your expense claim.

Each expense claim can contain multiple claim items and can also be started and saved for submission at your convenience allowing you to group all of your expenses for a trip or activity within one expense claim.

How do I make a claim?

To create an expense claim, start by clicking the eExpense icon from the main menu on the left hand side.

Next, click the 'my Claims' option in the sub-menu below the eExpense icon.



This will present all of your expense claims that you have started, but not yet submitted.

You can view your claims that have been submitted for approval by clicking on the 'Submitted Claims' tab and your claims that have been approved, denied or withdrawn by clicking the 'Processed Claims' tab.

To create a new expense claim, click the 'Make a New Claim' button.

You can now enter a summary description for the expense claim in the 'Description' field and select the type of expense you wish to submit from the 'Expense Type' dropdown menu.



The Expense Types available within the dropdown menu have been selected and assigned to you by your employer.

Please select the correct Expense Type & Category to avoid delays in processing. Incorrect selection could result in claim rejection and resubmission will be needed. Should you be in doubt, for Classroom [Training Activities sponsored](#) by the Company, do contact MLFMTMHRND@maersk.com. Any query not related to training claims should be forwarded to your respective Manning Office.

Expense Type (in New Expense)	Category (in Add Claim Item)
Training	BU Training - 19K Ship Handling Course
Training	BU Training - BTEP Bridge Team Enhance Prog
Training	BU Training - DML and Para 16
Training	BU Training - ETEP Engine Team Enhance Prog
Training	BU Training - Ice Navigation Polar Code
Training	BU Training - In Charge of Medical Care
Training	BU Training - Man B W Me Engine
Training	BU Training - MLSM Safety Behaviour Workshop
Training	BU Training - Personal and Professional PPA
Training	BU Training - Sulzer RT Flex Main Engine
Seminar	BU Training - Management Forum
Seminar	Seminar – Seminar
STCW Training	STCW Training - CPH STCW
STCW Training	STCW Training - GBR STCW
STCW Training	STCW Training - NLA STCW
STCW Training	STCW Training - SAF STCW

Next, click the Save button to proceed to the Claim Items screen or click the Cancel button to not proceed with submitting the claim.

Once you have clicked the 'Save' button you will be presented with the Claim Items screen which will allow you add your expense items to your claim.

At the top of the screen you will be presented with a Summary of your claim which includes the Claim ID, the Approver you have selected, the Claim Status and the Request Date.

The screenshot shows a web interface for 'Claim Items'. At the top, there is a navigation bar with 'Welcome Example Employee', 'Cookie Policy', 'Reset Password', 'User Guide', and 'Log Out'. Below this is a yellow header for 'Claim Items'. The main content area is titled 'Claim Summary' and displays the following details:

- Claim ID: 83
- Request Date: 28-Oct-2016
- Approver: Approver Group A
- Description: Example Expense Claim 2
- Claim Status: New

Below the summary are three buttons: 'Back', 'Withdraw', and 'Print'. At the bottom, there is a table with the following columns: 'Claim Item ID', 'Category', 'Expense Date', 'Description', 'Claimed Amount', and 'Item Status'. The 'Totals' row shows a 'Claimed Amount' of 0.00.

You will be presented with three buttons below the summary. The 'Back' button will return you to the 'My Claims' screen. The 'Withdraw' button will cancel the claim you have created. The 'Print' button will provide you with a report view of your expense claim you have created.

To add a new expense item to your Claim, click the 'Add New Item' button on the right hand side. This will present you with the Claim Item form.

The screenshot displays the MAERSK eExpense interface. At the top, there's a navigation bar with 'Welcome Example Employee', 'Cookie Policy', 'Reset Password', 'User Guide', and 'Log Out'. The main header shows 'eExpense' and 'My Claims'. The 'Claim Items' section features a 'Claim Summary' with the following details: Claim ID: 83, Request Date: 28-Oct-2016, Approver: Approver Group A, and Description: Example Expense Claim 2. Below the summary are buttons for 'Back', 'Withdraw', and 'Print'. A table below shows a total of 0.00. The 'Add Claim Item' form includes fields for Expense Date (28-Oct-2016), Category (Travel Expenses), Description, Expense Amount (0), Expense Currency (GBP - Pound sterling), Conversion Rate (1.00), Vessel (ABERDEEN), Claimed Amount (GBP) (0.00), and Employee Comments.

To complete your expense Claim Item form, start by selecting the date the expense occurred on by selecting a date from the 'Expense Date' field.

Next, select the type of expense you are claiming for from the 'Type' dropdown menu. The Expense Types available to you within the dropdown menu are carefully selected by your employer and is how your employer wishes you to categorise your expense claims.

Then, enter a description of the claim item in to the 'Description' field.

In the 'Expense Value' field enter the value of the claim item and then select the relevant currency from the 'Expense Currency' dropdown menu.

The 'Expense Currency' dropdown will default to the currency of your agreement.

When you amend the currency to a currency other than your agreement currency, the conversion rate will automatically populate for you.

When you amend the currency to a currency other than your default currency, you will have the ability to specify the conversion rate that has been applied to the expense.

From the 'Vessel' dropdown menu, select the vessel in relation to where your expense has occurred.

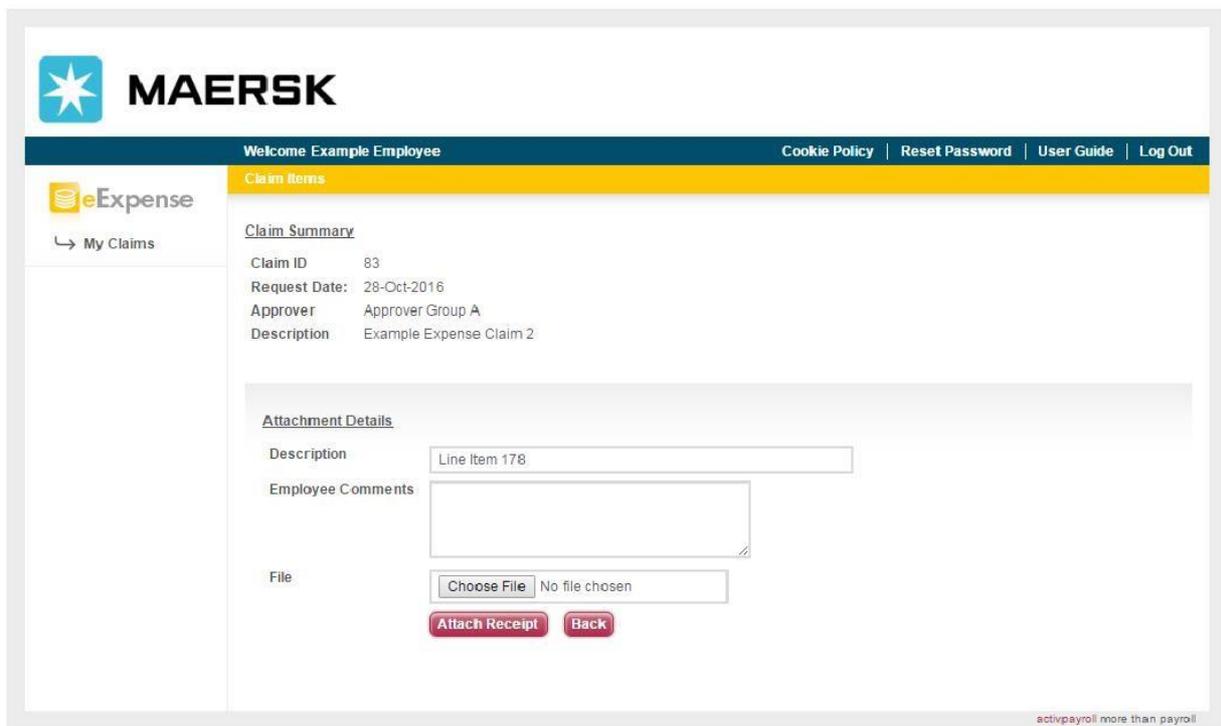
The 'Claimed Amount' field will show the total amount converted to your agreement currency.

Below the 'Total' field, the 'Claimed Amount' field will show the total amount converted to your default currency.

You can enter any additional notes or information you wish the approver to see to support your claim in the notes field.

All claim items require a receipt to be attached before the expense claim can be submitted by you and will appear in red in the claim grid until a receipt is attached.

To attach your scanned receipt or supporting document to your claim, click the 'Attach Receipt' button.



This will save your claim and direct you to the File Attachment screen. The description of the attachment will pre populate to the Identifier of the claim item you are entering.

You can change the default description to a description that is more appropriate if required, and also enter any additional notes in the 'Notes' field.

To select the file you wish to attach, click the 'Choose File' button. From the File Explorer window, click on the required file and click 'Open'.

Ensure the correct file has been selected, and click 'Attach Receipt' to save the attachment.

The file will appear under the 'Attached Receipts and Supporting Documents' section at the bottom of your claim.

At the bottom of the Claim Item you will be presented with three buttons.

The 'Save Item' button will save the claim item and return you to the top of your claim.

The 'Save and New' button will save your claim item and create a new claim item form for you to enter an additional expense.

The 'Close' button will hide the claim item form and show you the claim item summary grid of all claim items currently entered for the expense claim. Clicking the Close button will not save your claim.

Now that you have completed your expense claim, you will be presented with an additional button in the summary section labelled 'Submit'. Click the 'Submit' button to send the expense claim for approval to your chosen approver.

Once your claim has been submitted, you and your assigned approver will receive an email notifying that the expense has been successfully submitted and an approval must be actioned. If you don't receive an email notification, please ensure you have checked your email spam folder before raising a help request via eHelp for further assistance.

How do I monitor my claims?

To amend an expense that you have been requested to provide more information, click on the 'My Claims' option in the submenu below the eExpense icon.

On the 'Unsubmitted Claims' tab, click the pencil icon in relation to the expense claim you have been requested to provide additional information. The expense claim will have a 'Claim Status' of 'More Info'. Please note, you may have multiple expense claims which require additional information.

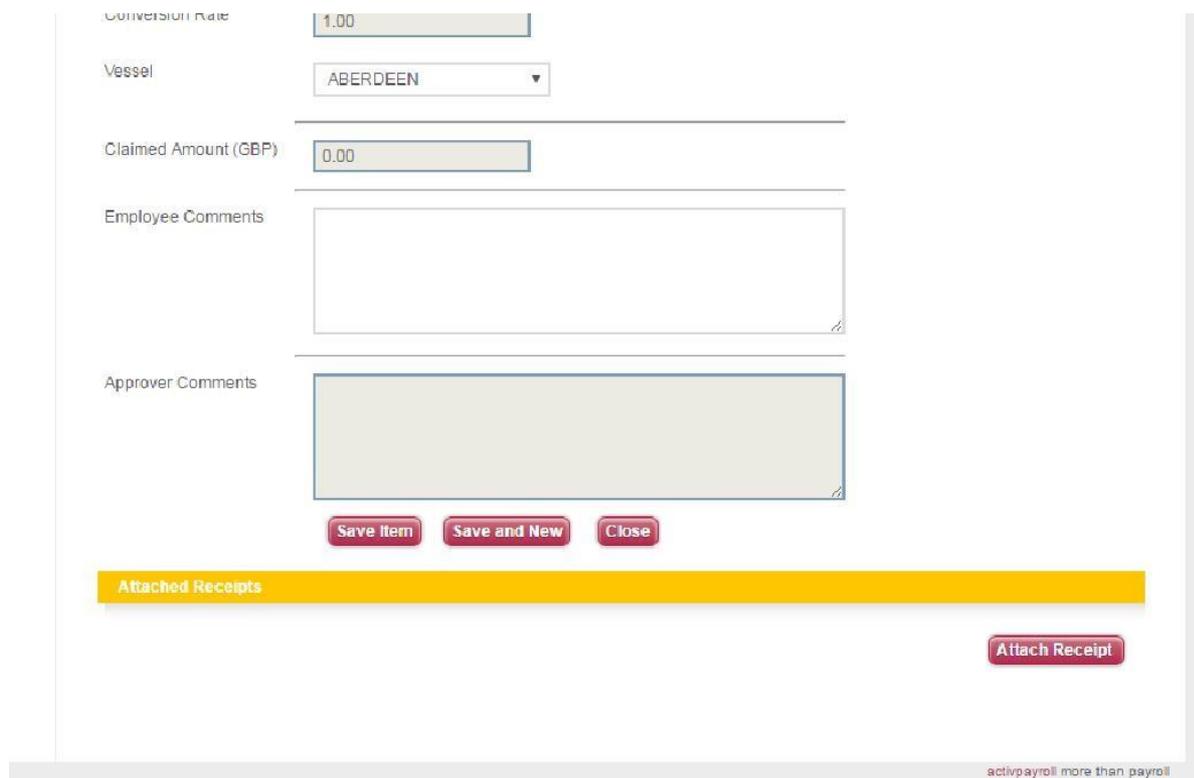


The screenshot shows a web interface with a 'Claims' tab. Below the tab is a table with the following columns: 'Claim Description', 'Approver', and an edit icon (pencil). The table contains two rows of data.

Claim Description	Approver	
Example Expense Claim	Approver Group C	
Example Expense Claim 2	Approver Group A	

At the bottom right of the interface, there is a logo for 'activpayroll more than payroll'.

Next, click the pencil icon for the claim item with an 'Item Status' of 'More Info'. Please note, you may have multiple claim items which require additional information.



The screenshot shows a form for editing a claim item. The form includes the following fields and controls:

- Conversion Rate:
- Vessel:
- Claimed Amount (GBP):
- Employee Comments:
- Approver Comments:
- Buttons: , ,
- Attached Receipts:

At the bottom right of the interface, there is a logo for 'activpayroll more than payroll'.

In the 'Approver Comments' field, you will have been provided feedback for which area of you claim item requires amendment.

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