Configure Excess Mileage

Last Modified on 23/02/2021 10:48 am GMT

Permissions

You will require an Access Role with the following permissions:

- Base Information
- Expense Items

Step 1 - Configure the Expense Item

Note: Adding or amending expense items may cause payment issues if you do not make the appropriate changes to your financial export reports to reflect the expense item changes. This occurs as the payment report will reference certain information from an expense item, which if it has been changed, may cause the connection between the two to fail. This can lead to incorrect payments for claimants; therefore if you are unsure please raise a ticket with our Service Desk to discuss further.

To setup an expense item for excess mileage please follow these steps:

1. Navigate from the **Home** page to **Administrative Settings | Base Information | Expense Items**

Expense Items

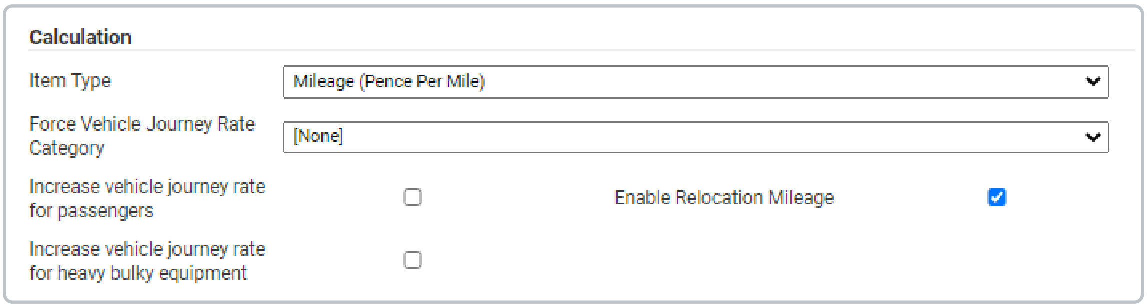
1 2 3 4 5 > >> filter

		Expense Category ▲	Expense Item	Expense Item Description
		1 Of Each	StandardItem	
		1 Of Each	Pencer Per Mile	
		1 Of Each	Meal	
		1 Of Each	Daily Allowance	
		1 Of Each	Fuel Receipt	
		1 Of Each	Mileage (Fuel Receipt)	
		1 Of Each	Fixed Allowance	
		1 Of Each	Fuel Card Mileage	
		1 Of Each	Item Reimburse	
		1 Of Each	Fixed Excess Mileage	
		1 Of Each	Fixed Mileage Deduction	
		1 Of Each	Hotel std item	
		1 Of Each	ToAndFrom	
		1 Of Each	SplitItem	
		1 Of Each	ToandFromWithoutJourneyGrid	

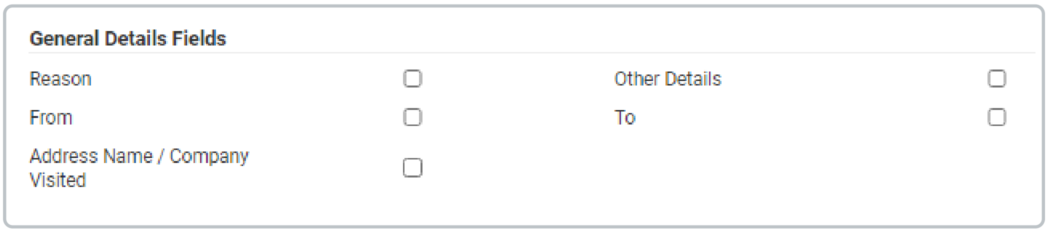
2. Create or edit an expense item that you want to use for excess mileage. For more information on creating an expense item, view Create an Expense Item.

3. Ensure that the expense item **Item Type** field is set to **Mileage (Pence Per Mile)**.

4. Select the **Enable Relocation Mileage** check box within the 'Calculation' section.

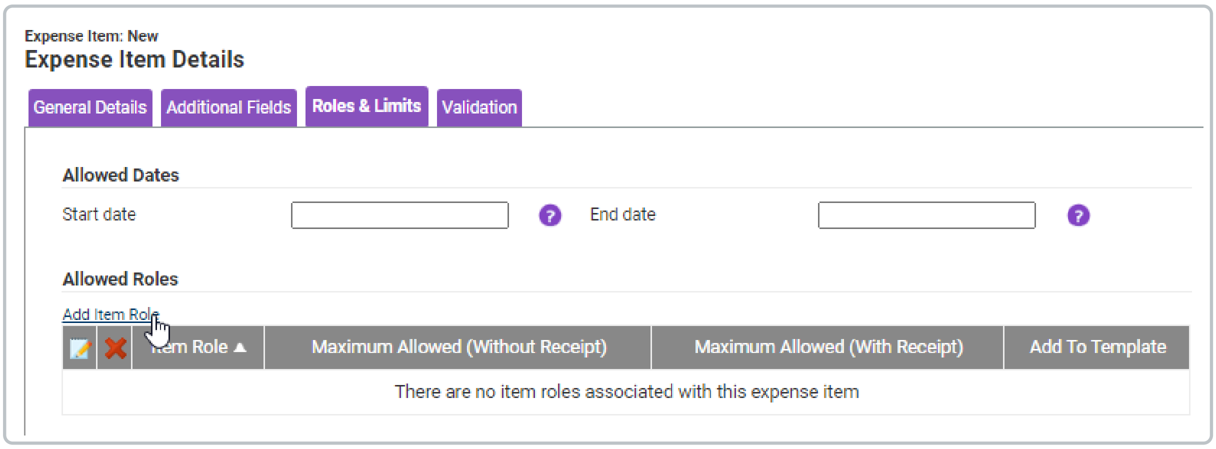


5. Click the **Additional Fields** tab. Within the **General Details Fields** section, ensure that the **From** and **To** check boxes are cleared.



6. Navigate to the **Roles & Limits** tab. Here you will be able to ensure which **Item Roles** will be able to claim for this expense item.

7. Click **Add Item Role** and select an item role from the **Item Role** drop-down list. For more information on creating an item role and assigning it to a claimant, view Manage Item Roles.

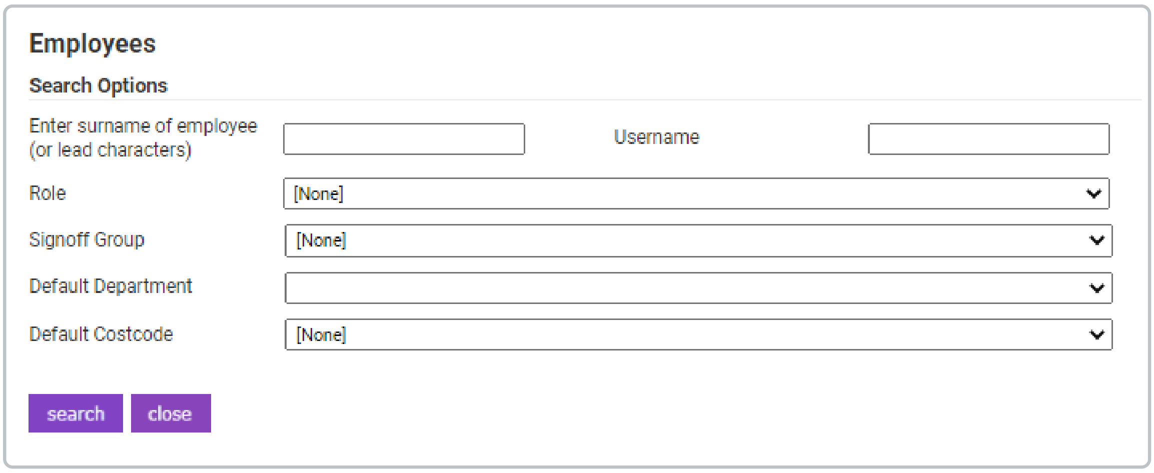


8. Click **Save** to store the changes and return to the Expense Items menu.

Step 2 - Configure the Employee

To ensure that a user can claim the excess mileage expense item, follow the steps below:

1. Navigate from the **Home** page to **Administrative Settings | User Management | Employees**.

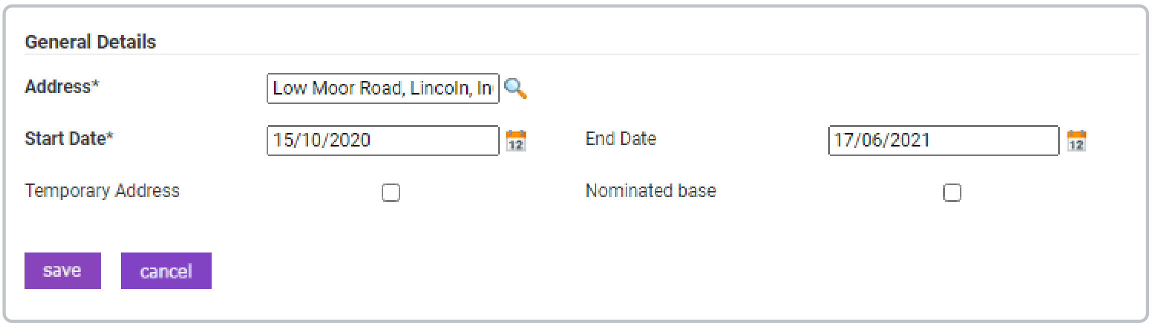


2. Search for the user you want to be able to claim excess mileage using the **Search Options** on the Employees page.

3. Ensure that the user has a Work Address configured. This Work Address must meet the following criteria:

    - A **Start** and **End Date** configured

    To add an address, click **New Work Address** then enter the correct details in the pop-up window.



4. Ensure that the user has a second Work Address. This Work Address must meet the following criteria:

    - The **Temporary Address** check box selected
    - To be further away from the Home Address than the address in **step 3** of this guide
    - To have a **Start Date** the same as the **End Date** of the address in **step 3** of this guide.

5. Click Save to store changes to the user’s Work Addresses.