

# Configure Excess Mileage

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## 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	>	>>	<input type="text"/>	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.

**Calculation**

Item Type ▼  
Mileage (Pence Per Mile)

Force Vehicle Journey Rate Category ▼  
[None]

Increase vehicle journey rate for passengers

Increase vehicle journey rate for heavy bulky equipment

Enable Relocation Mileage

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

**General Details Fields**

Reason  Other Details

From  To

Address Name / Company Visited

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](#).

Expense Item: New

**Expense Item Details**

General Details Additional Fields **Roles & Limits** Validation

**Allowed Dates**

Start date  ? End date  ?

**Allowed Roles**

[Add Item Role](#)

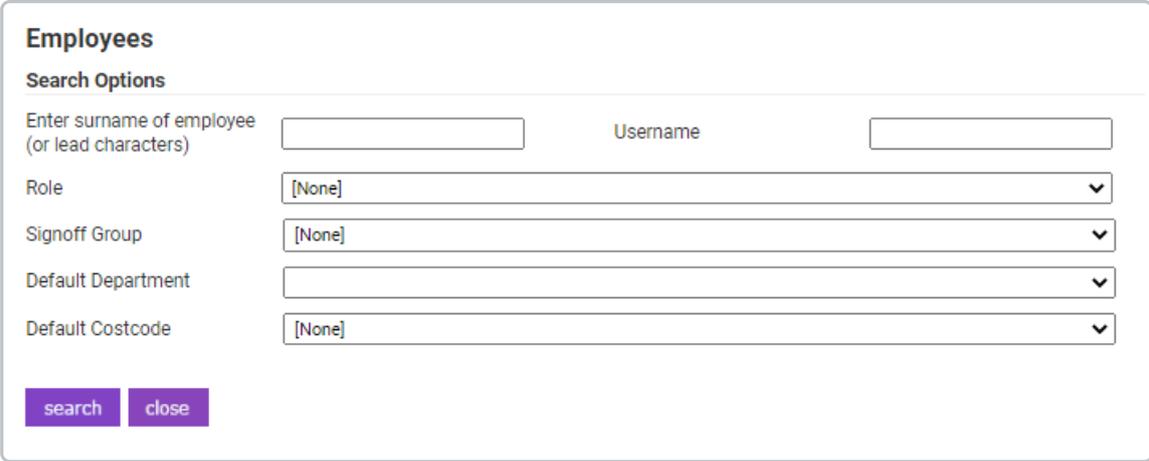
	Item Role ▲	Maximum Allowed (Without Receipt)	Maximum Allowed (With Receipt)	Add To Template
There are no item roles associated with this expense item				

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:

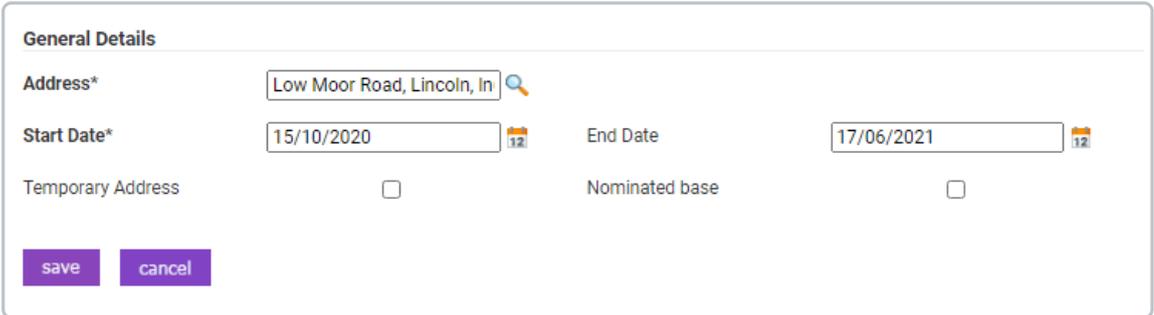
1. Navigate from the Home page to **Administrative Settings | User Management | Employees**.



The screenshot shows a form titled "Employees" with a section for "Search Options". It includes two text input fields for "Enter surname of employee (or lead characters)" and "Username". Below these are four dropdown menus for "Role", "Signoff Group", "Default Department", and "Default Costcode", each with "[None]" selected. At the bottom are two buttons: "search" and "close".

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

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



The screenshot shows a "General Details" pop-up window. It has an "Address\*" field with "Low Moor Road, Lincoln, In" and a location icon. Below it are "Start Date\*" and "End Date" fields, both with calendar icons. The "Start Date" is "15/10/2020" and the "End Date" is "17/06/2021". There are two checkboxes: "Temporary Address" (unchecked) and "Nominated base" (unchecked). At the bottom are "save" and "cancel" buttons.

4. Ensure that the user has a second Work Address. This Work Address must meet the following criteria:
  - o The **Temporary Address** check box selected
  - o To be further away from the Home Address than the address in **step 3** of this guide
  - o 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.

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