
DURHAM \$U

How to... expense

365.

Expense 365 – Prezi extracts.

2. What is the app designed for?

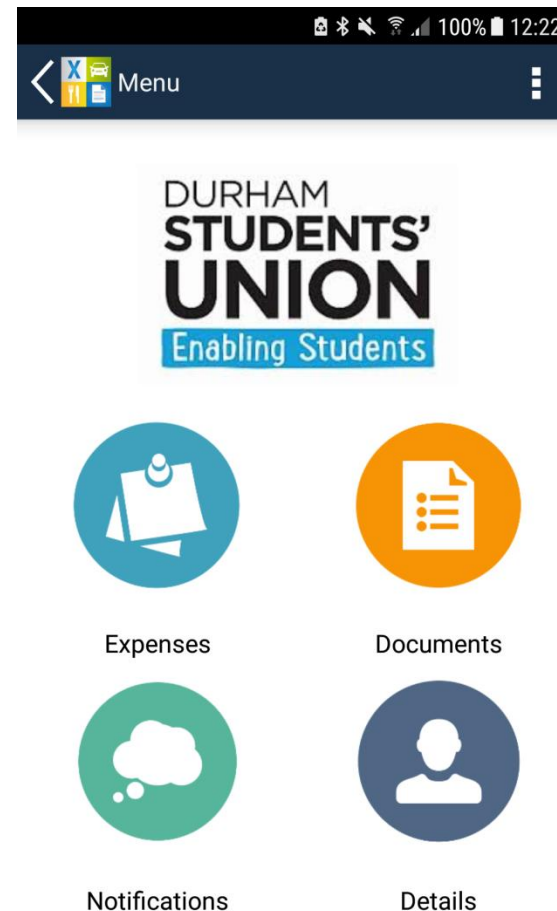
1. Making it easier to claim expenses for student group activities.
2. Enabling student groups to check their current account balance at the touch of a button.

3. Setting up the app.

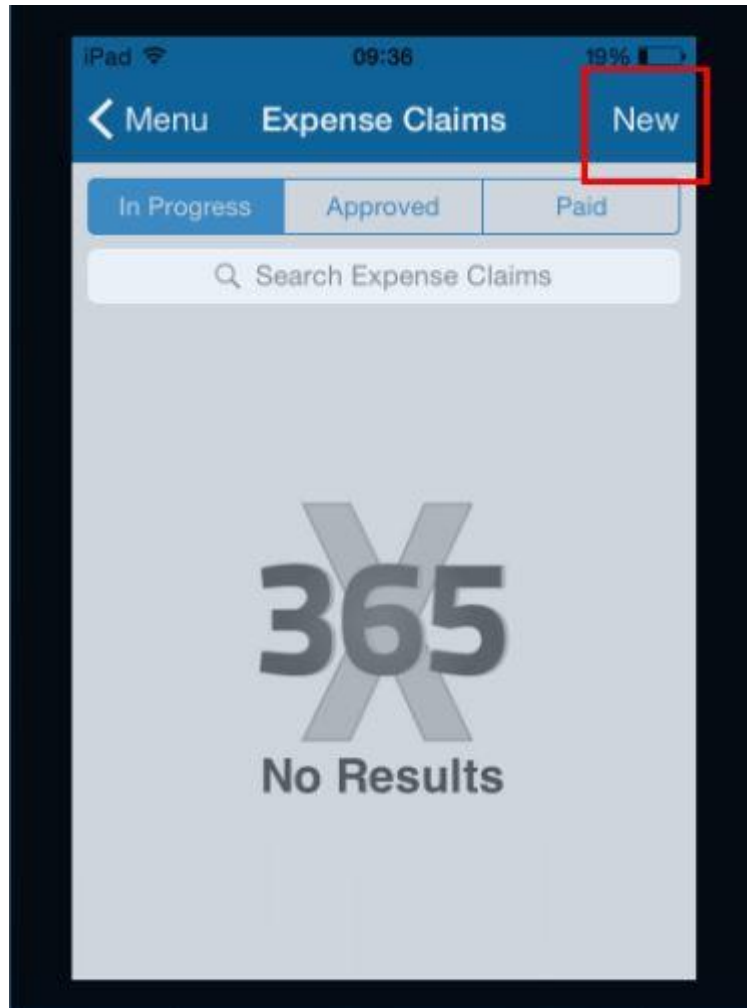
1. Download the app (eXpense 365) from the relevant app store for your device - it is currently available for Apple and Android devices, with Windows devices coming soon.
2. Tap 'register' and enter your student email address, first and last name. Keep the email you are sent with your default password, sign in then change the password.
3. From the main menu screen, tap 'Details' to add your bank account information so that expenses claims can be paid straight into your account.
4. When you do this, you'll be prompted to enter your password again, as an additional security check.

4. Creating an expenses claim.

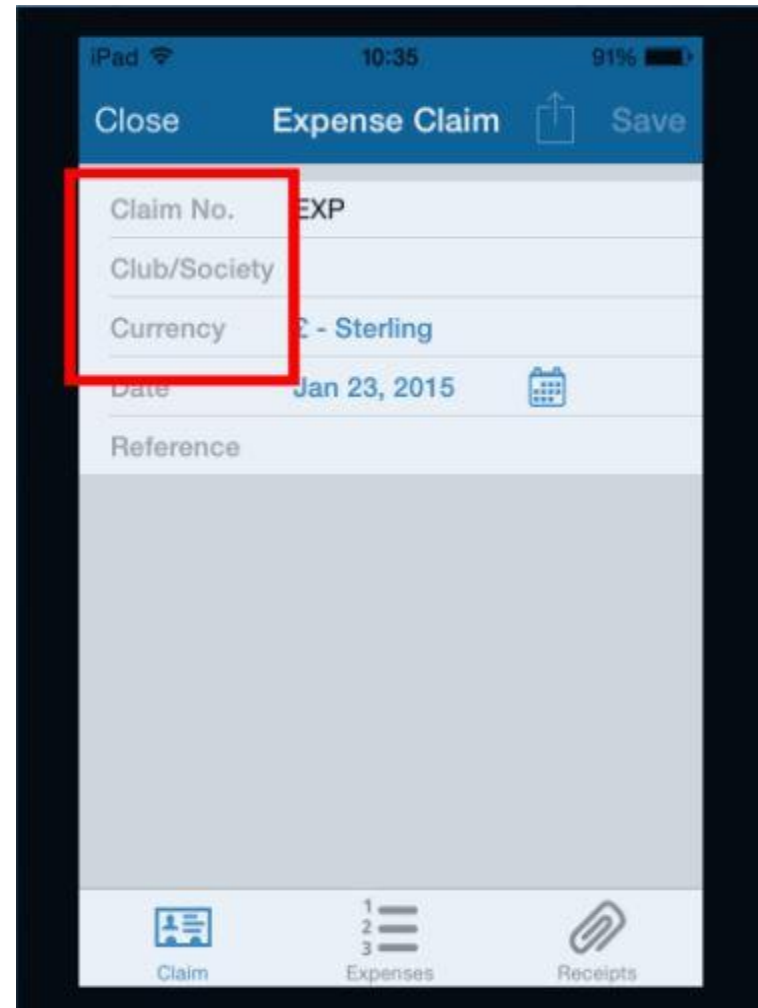
1. When creating an expenses claim, make sure you have all the totals and proof of purchases ready, so you can complete the process faster.



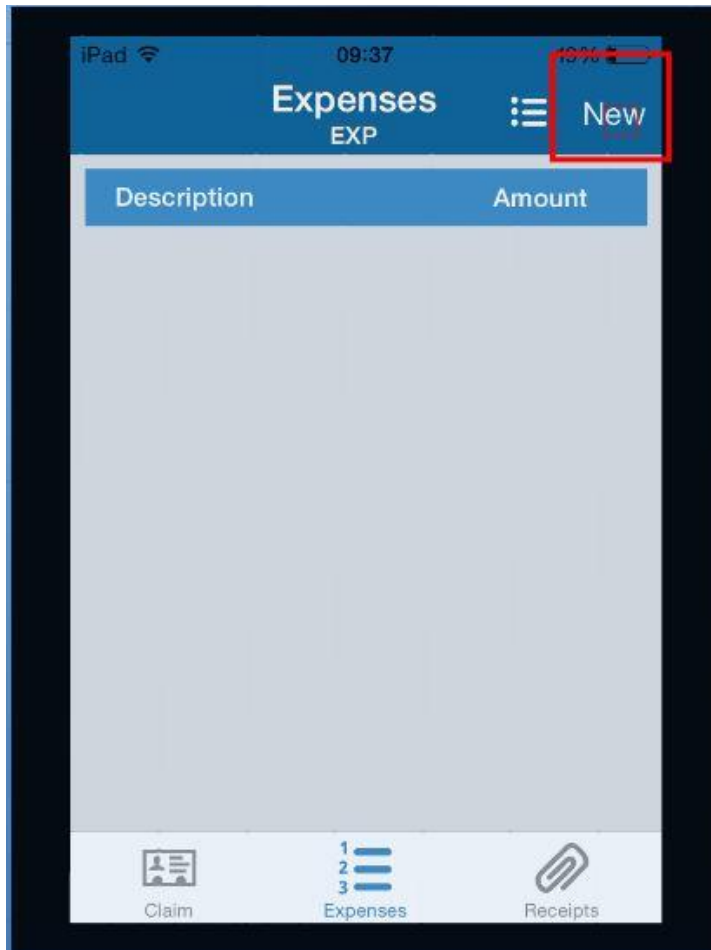
2. From the 'menu' screen tap 'expenses'.



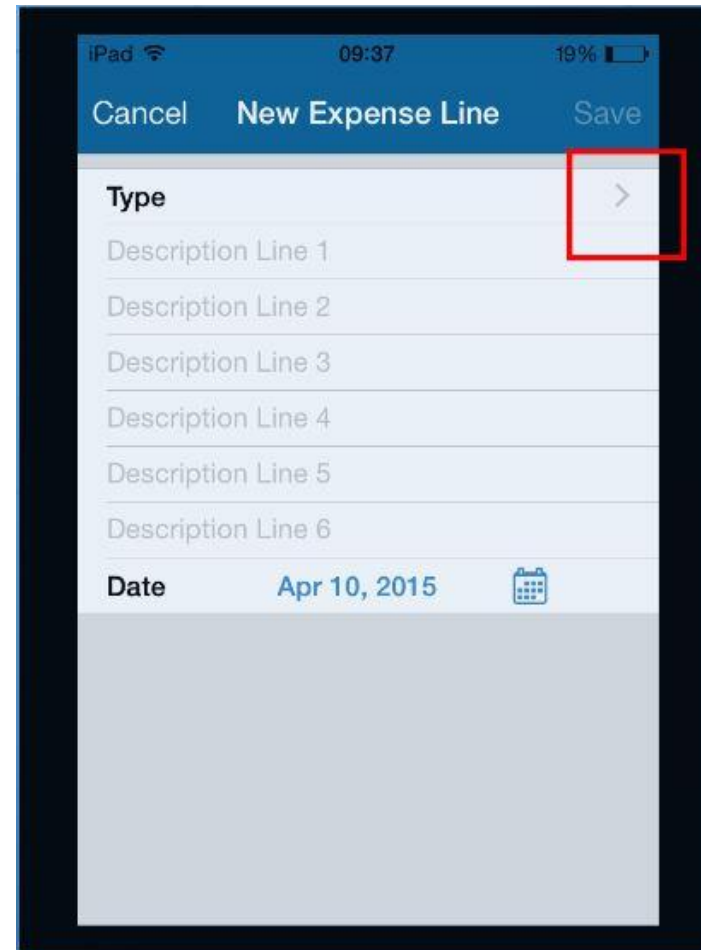
3. This takes you to a summary of which claims you have in process you can also tap to see which claims have already been approved, and which have been paid. Tap 'new' to begin a new claim.



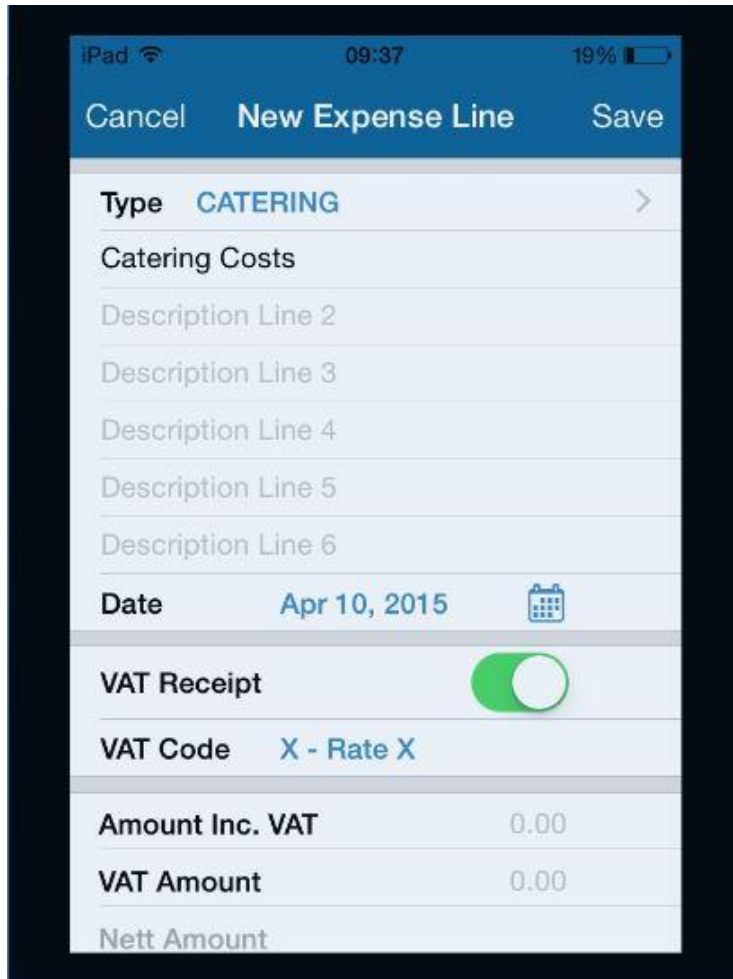
4. Select which student group you are representing in 'club/society'. You can also add a reference (e.g. fresher's materials). When finished tap onto 'expenses' at the bottom of the screen.



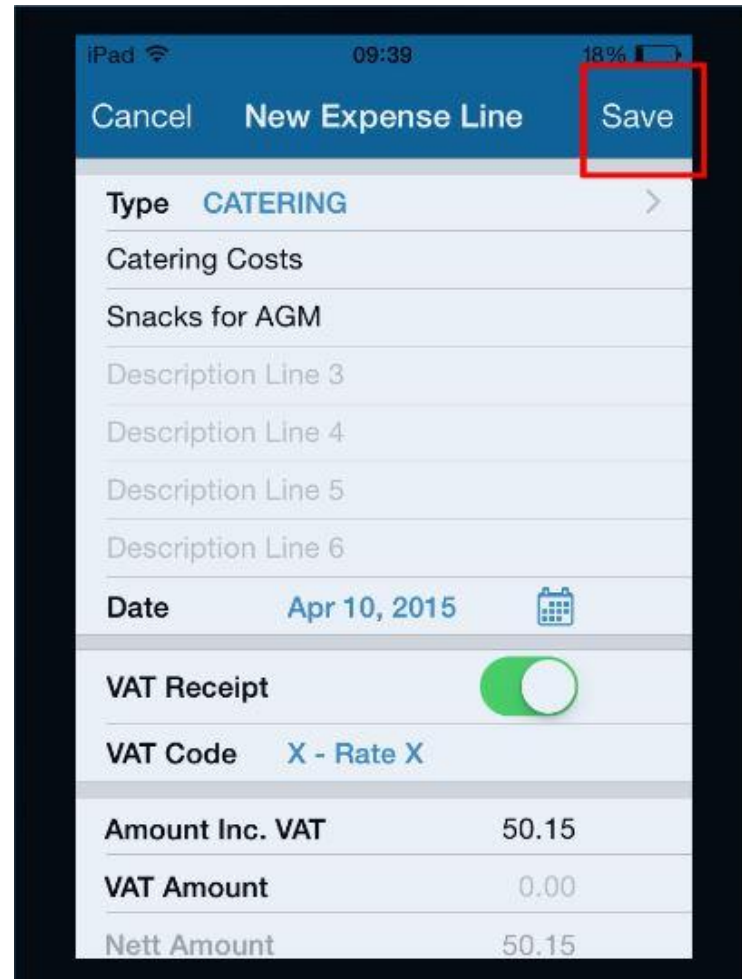
5. This takes you to a screen where you can add different expense lines. Click 'new' to start adding lines to your expense claim.



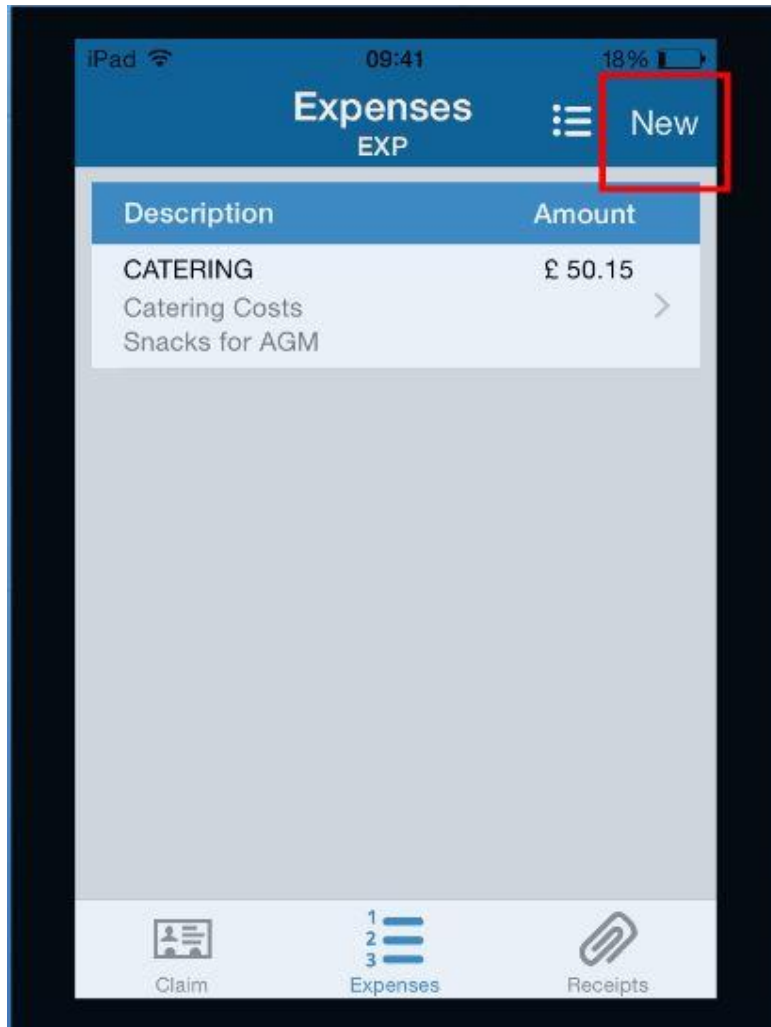
6. Choose which type of expense you are claiming for by tapping the arrow by 'type'. Remember you can change the date for when the expense was incurred towards the bottom of the screen.



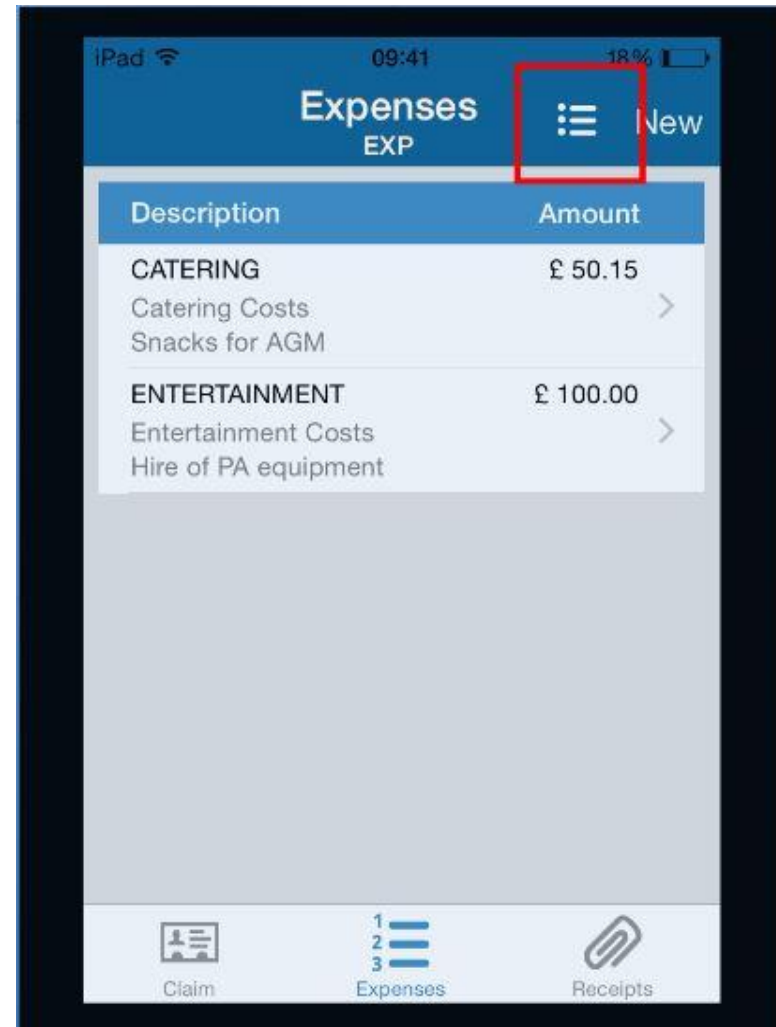
7. In this example we have selected 'catering costs'. Don't worry if you have multiple things to claim for – you can add more on later.



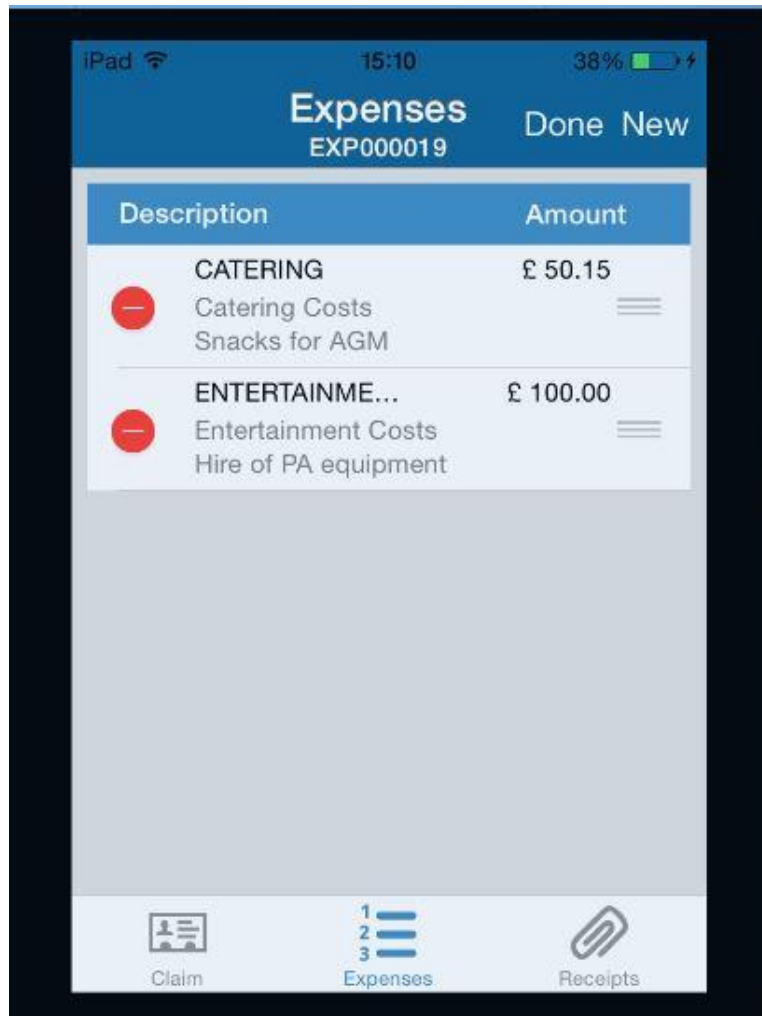
8. Add further details to help later reference as to what the expense was for (in this instance, snacks for AGM) and at the bottom insert the amount claimed for. Clicks 'save' when finished.



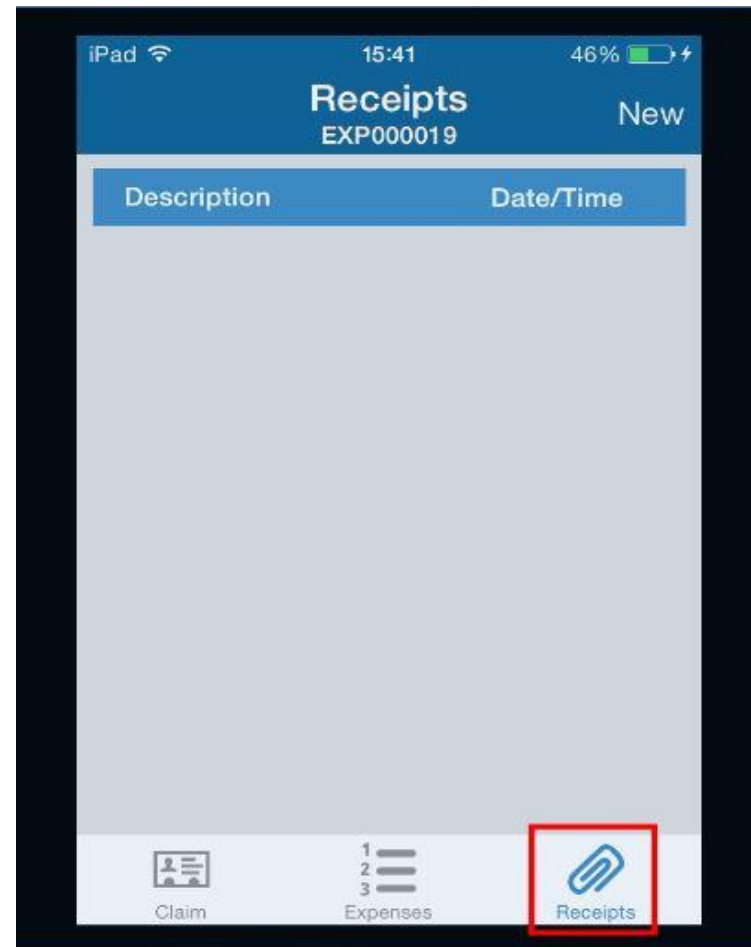
9. We can now add further items to claim for ('new') , or proceed to adding receipts ('receipts').



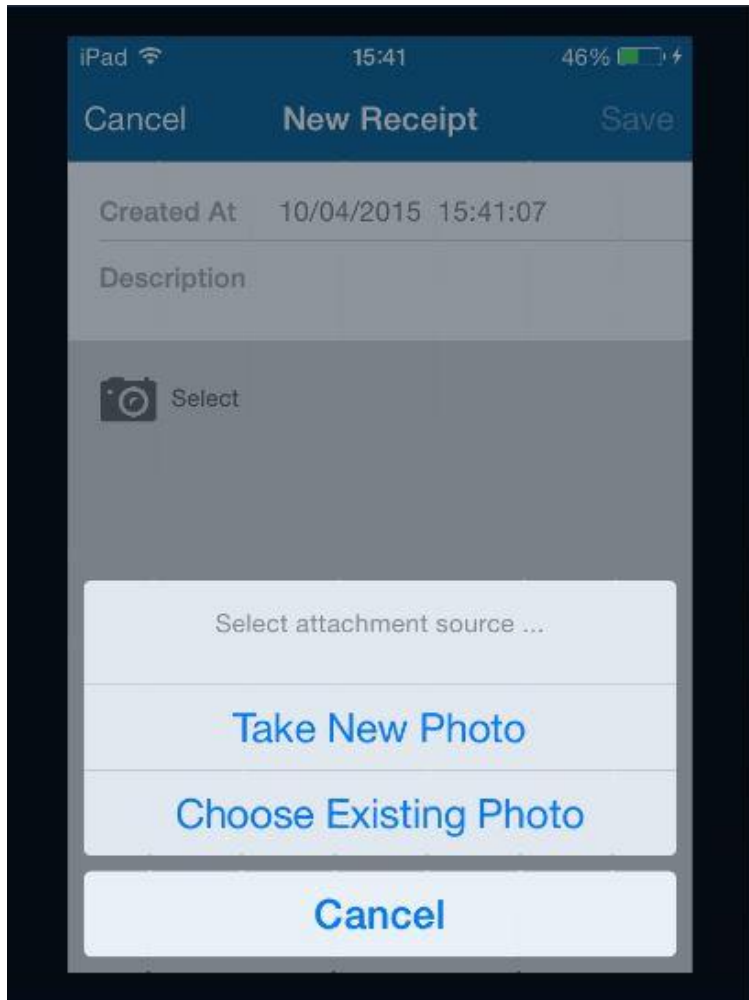
10. In this example we have added an extra line of expenses.



11. If we wanted to remove a line, tap the (logo) button and you will have the option to remove a line. Tap 'done' when complete.



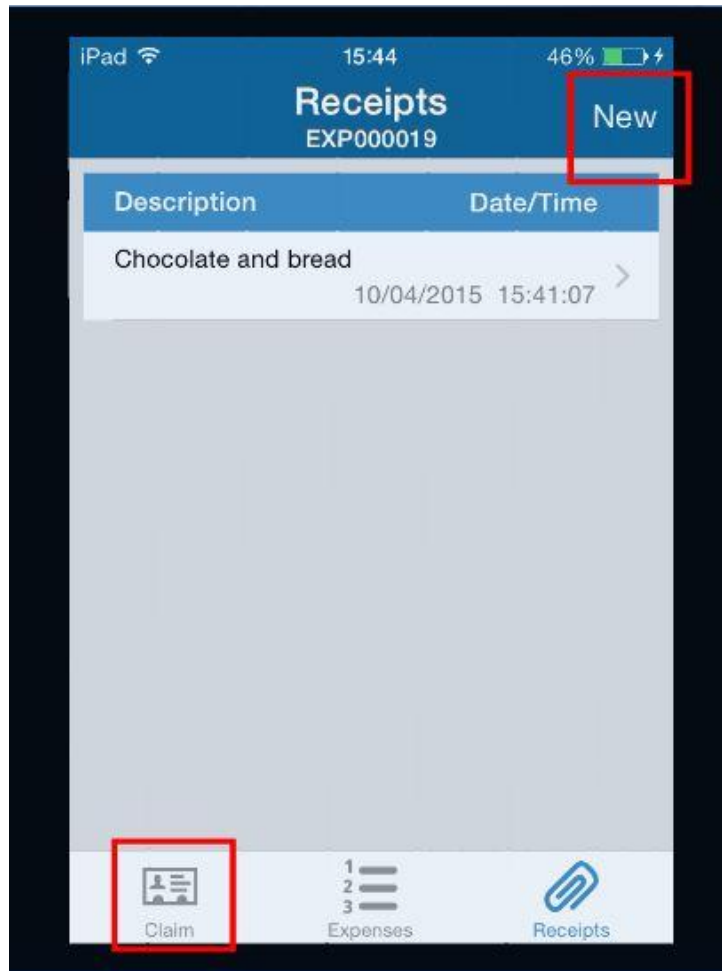
12. Tap 'receipts' to attach proof of your expenditure.



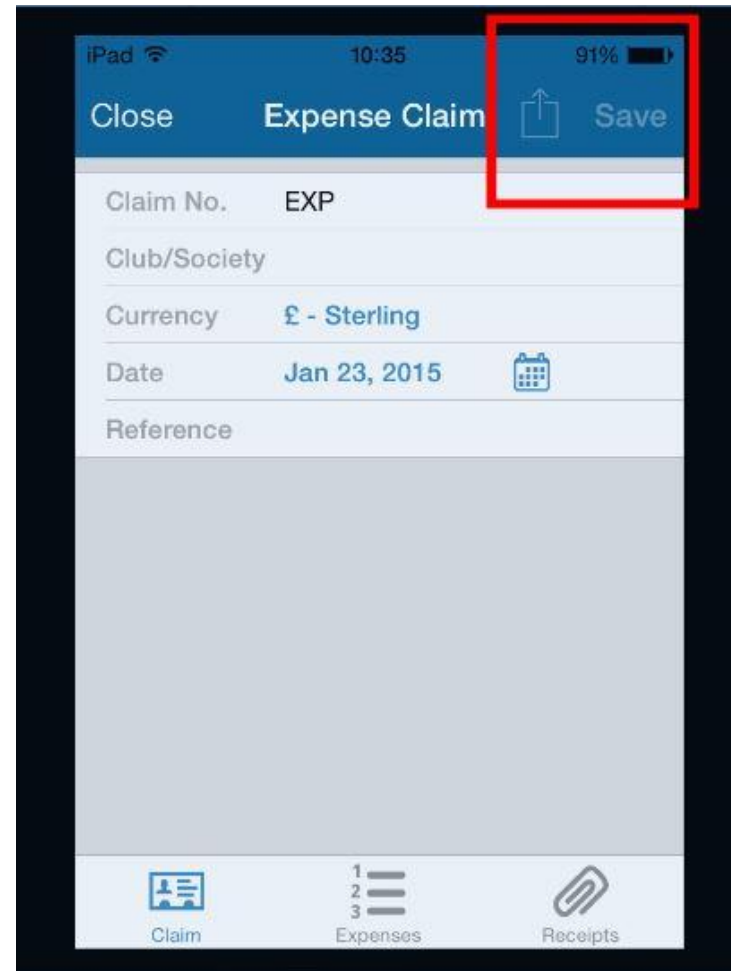
13. When you move onto 'receipts', you can easily take a photo of the receipt, or choose an existing photo.



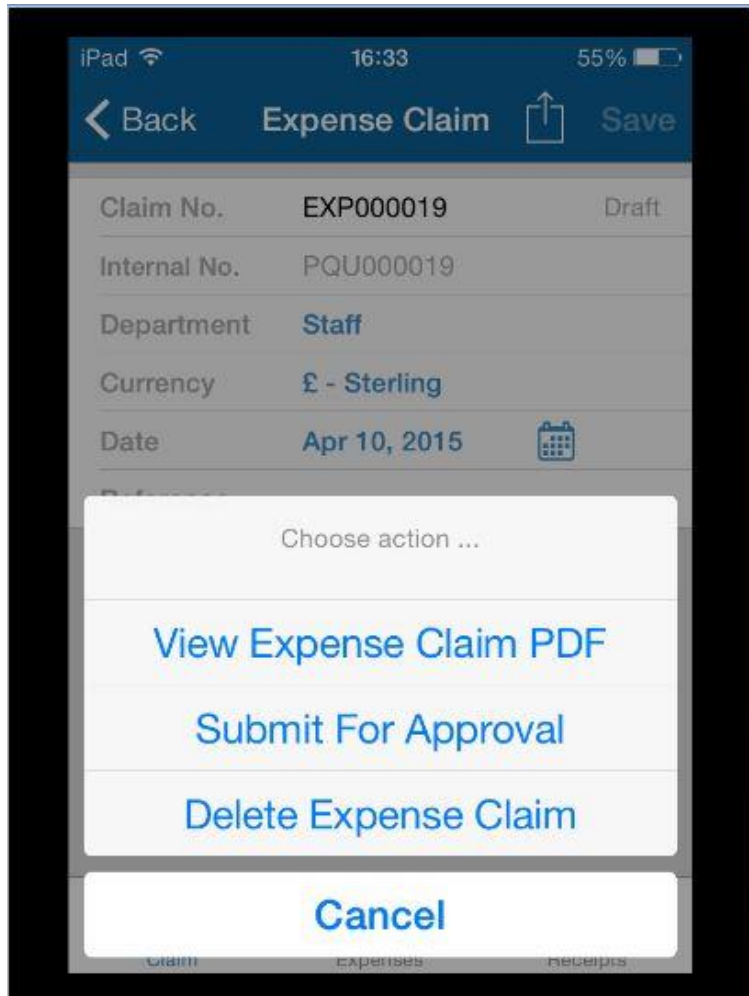
14. Take a photo of your proof, making sure that the total amount spent is clearly visible. Use the 'description' field to clarify what is being claimed for.



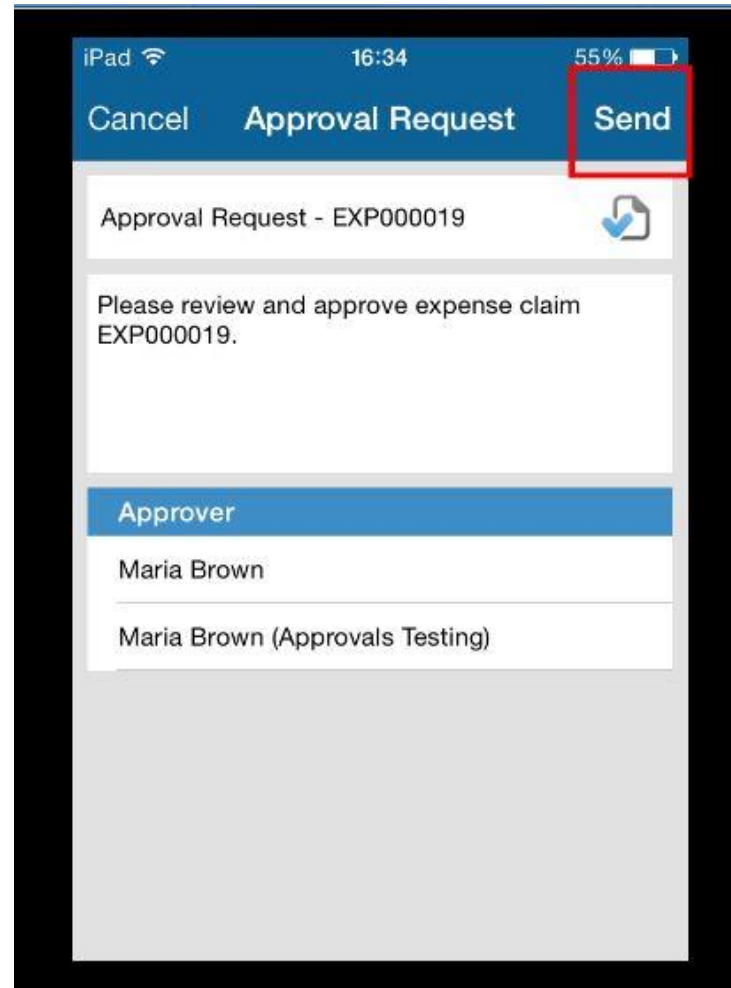
15. After you have clicked 'save', you come back to this screen. You can add further receipts by clicking 'new', or go back to the initial claim page to proceed.



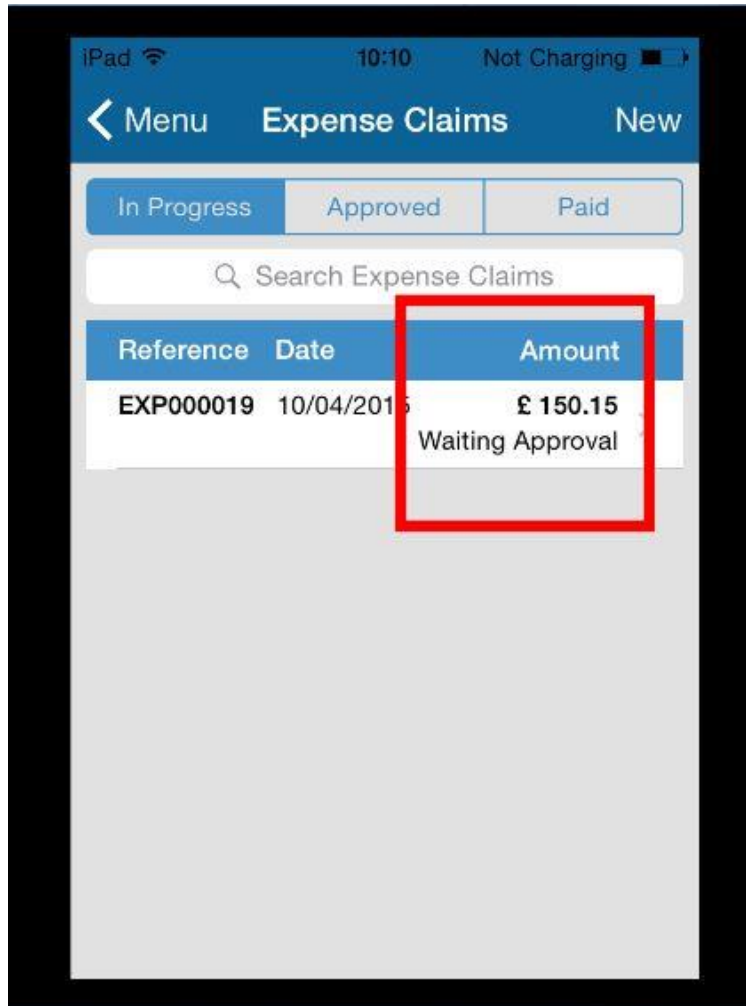
16. On the 'claim' screen first tap 'save', then the 'send' icon next to it.



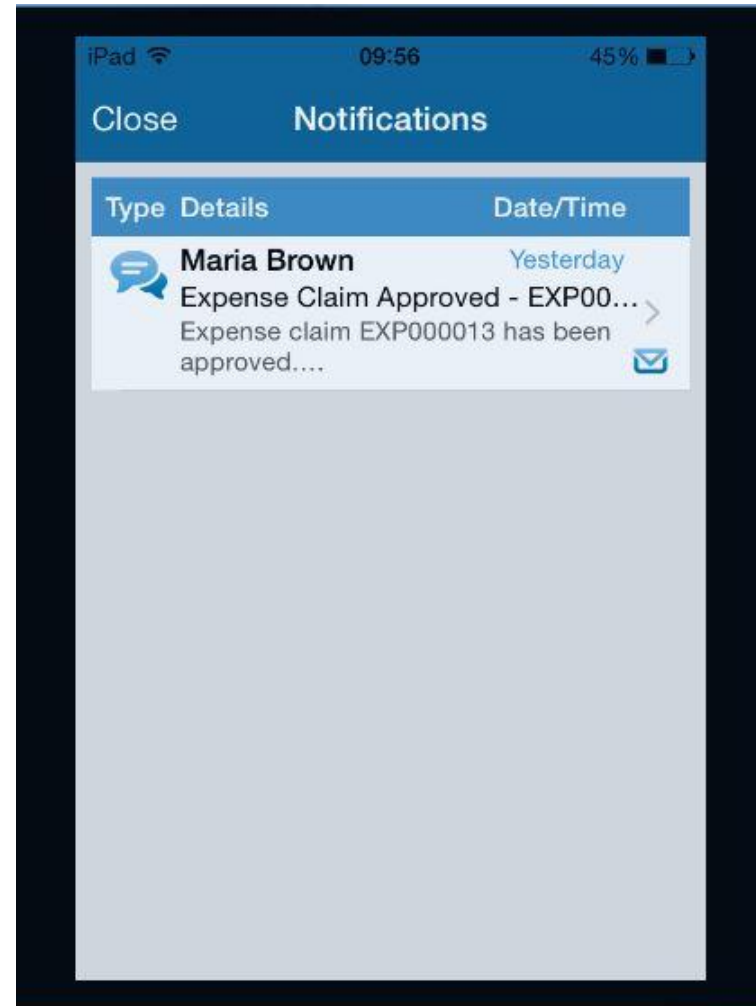
17. At this point, you can view the claim as a PDF, submit it for approval or delete the claim.



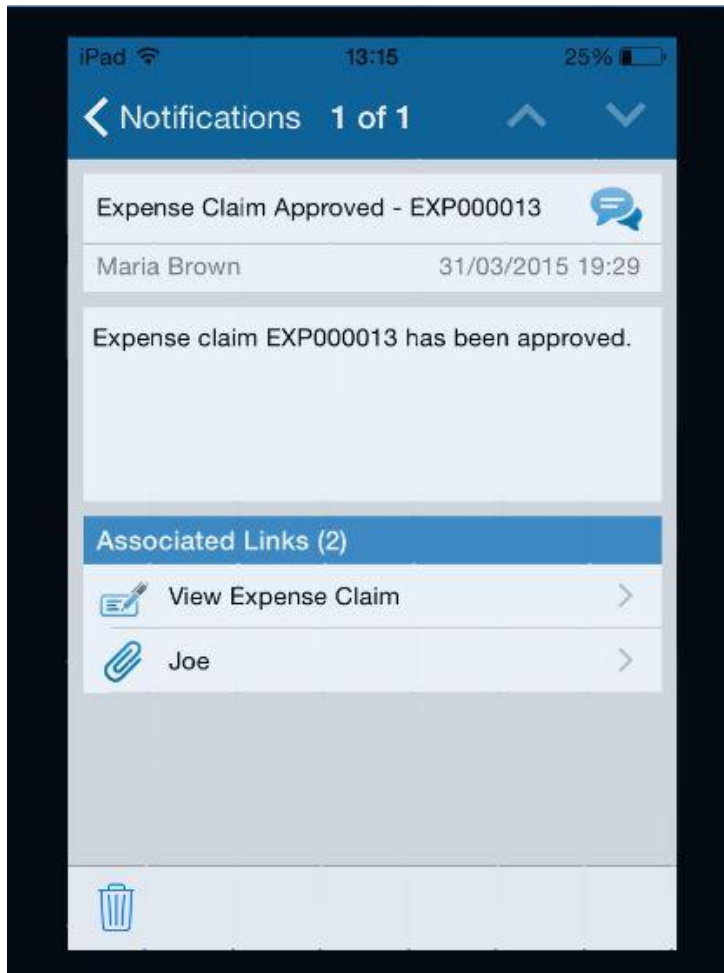
18. When you choose 'submit for approval', you will get a screen where you can choose who you are asking to approve the claim, click 'send' once you have chosen the relevant approver.



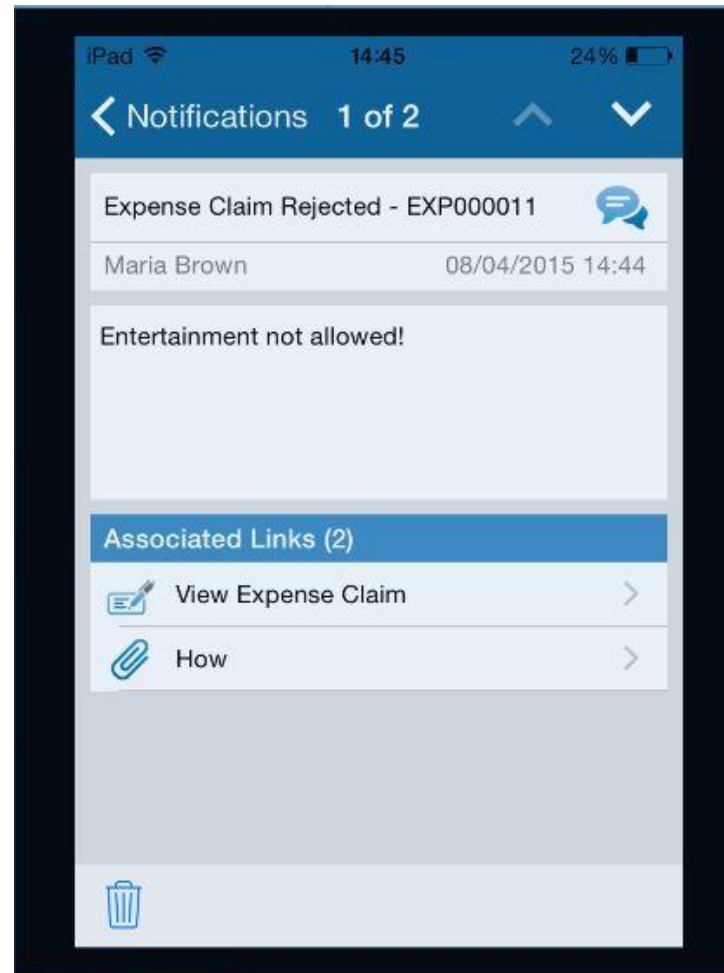
19. After submission, you will be brought back to the Expense Claims menu. Your new claim will be listed as 'In progress', with 'waiting approval' under the amount.



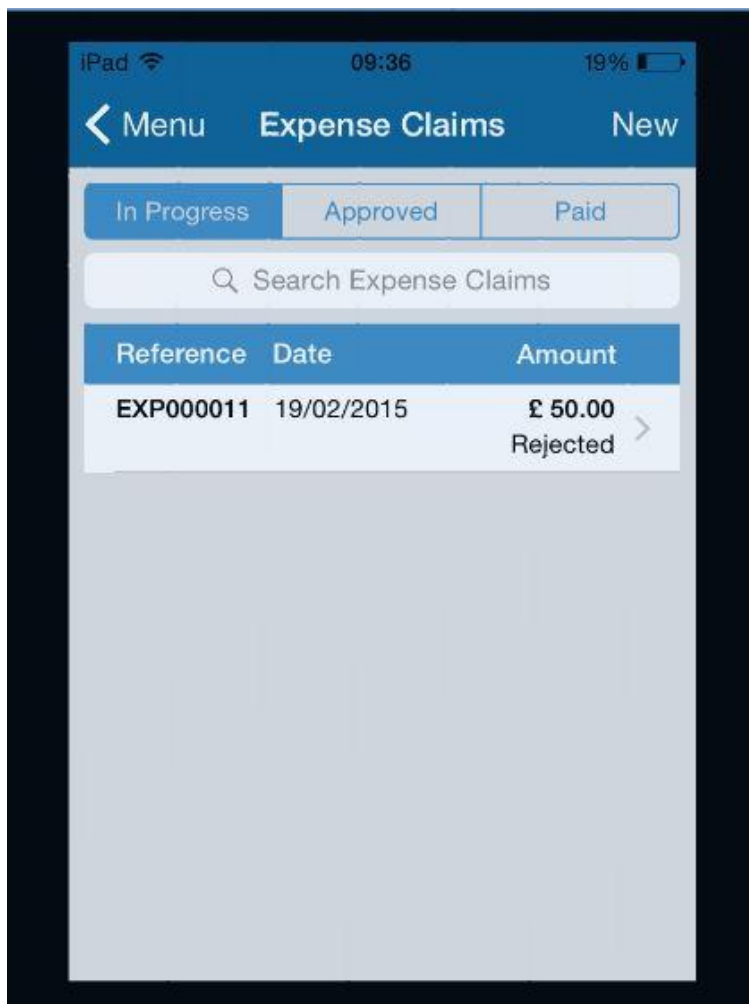
20. When your claim has been approved you will get a notification from the app to let you know.



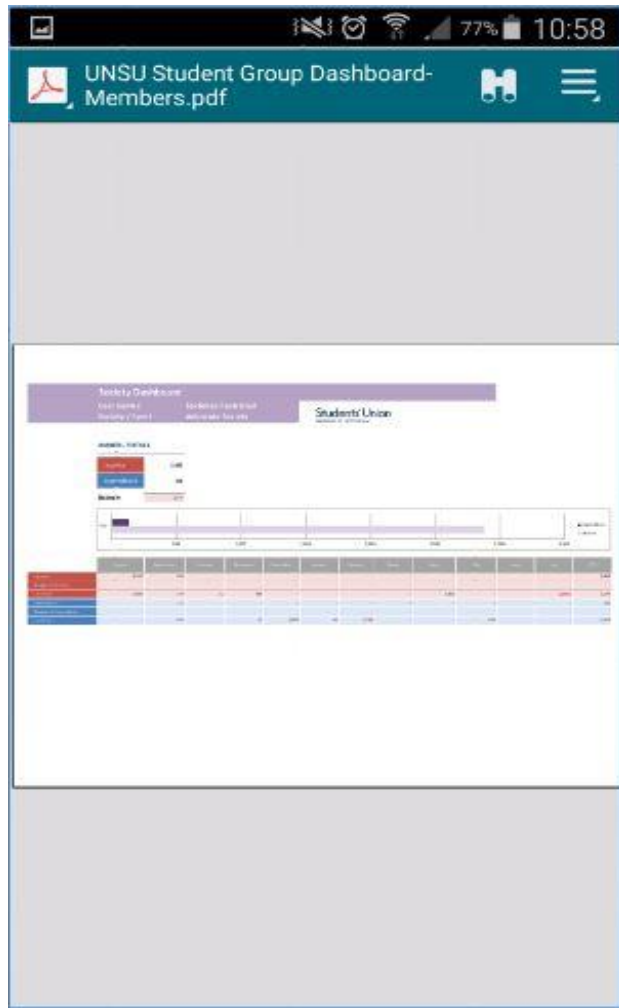
21. You can tap onto the notification to see the full detail, such as any message that may have been left for you.



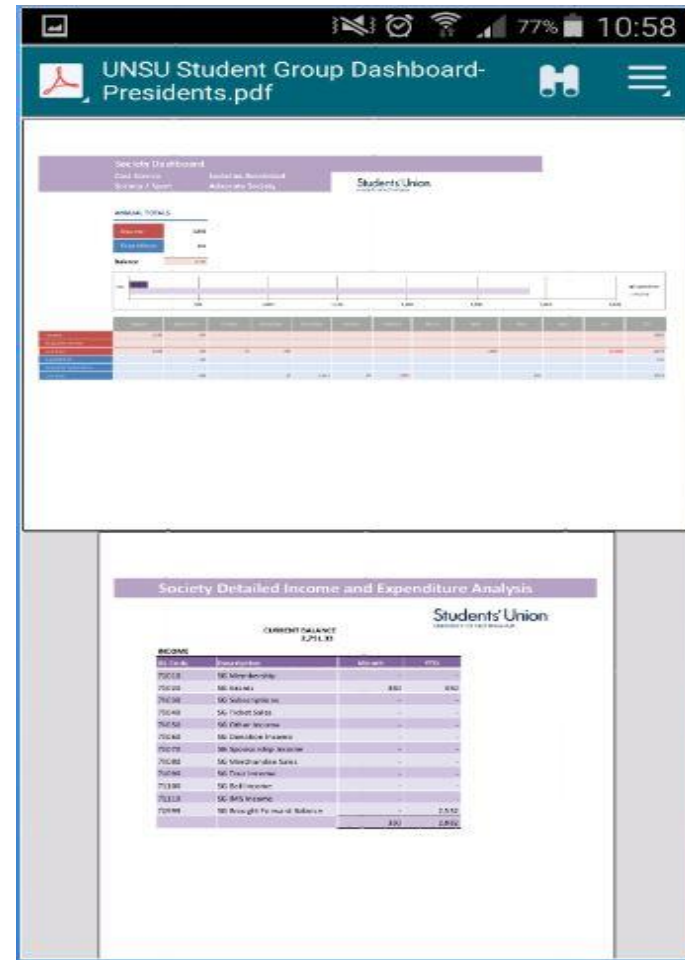
22. If your claim is rejected by the approver, you will also get a notification. You can tap into this for more detail; there should be a reason why it has been rejected.



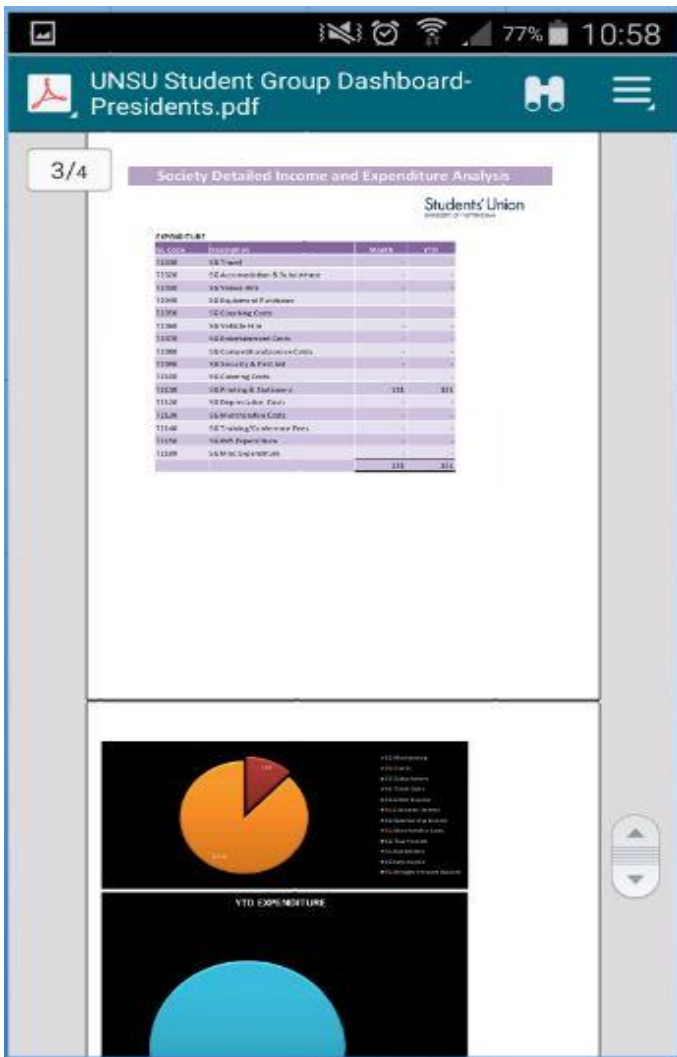
23. Rejected claims appear back in your 'in progress section', so you can edit and resubmit if you need to. Alternatively you can delete the claim.



- The 'Members Dashboard' gives members basic information on how much is in the society account and when it is spending money - but not on what specifically!



- The 'Presidents Dashboard' is only visible to Presidents and Treasurers for the group. It gives you information related to what you are spending/earning in each of the narratives, along with a couple of pie charts to visually display this.



Check that you are a member of the correct organisation (i.e. have paid your membership - they expire on 31st September each year).

Check that you are listed as the President or Treasurer on the website (as in the example). If you aren't, you need to be given admin rights to the website, which the President should be able to do.

Ensure you are using the latest version of the app.

If you are having trouble logging in, try resetting your password using the 'Forgot your password' link on the first screen. You can also try logging out then back in again.

If you have tried all the above, please email dsu.engagement@durham.ac.uk who will try to help you.

