

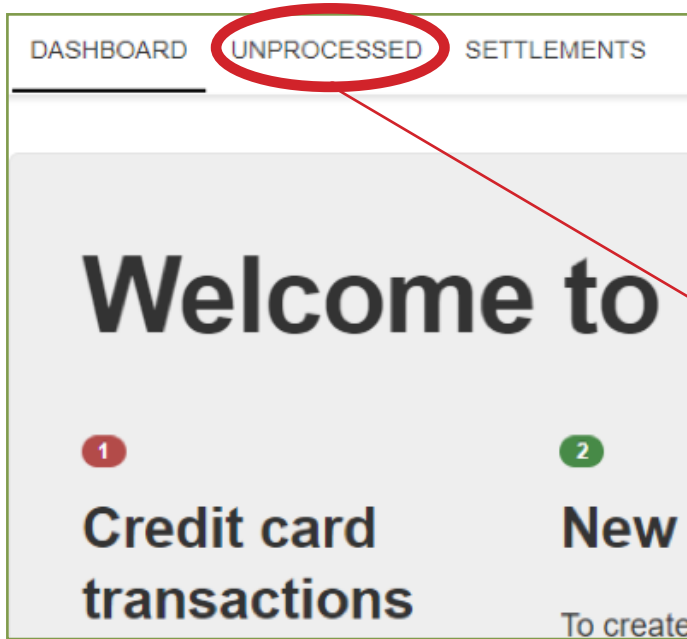
# Handling travel reimbursement using zExpense

- for external users:

## Creating an expense / single purchase



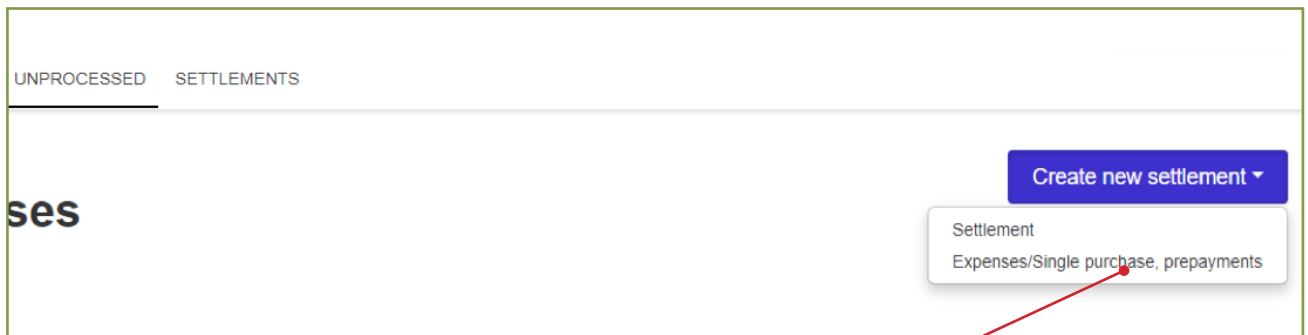
## 1 Log in



Log in to [zexpense.dk](https://zexpense.dk)  
As an employee, you have to use [sdu.dk/rejser](https://sdu.dk/rejser)

Select 'Unprocessed'

## 2 Create new settlement



Click the blue button 'Create new settlement'. Chose 'Expenses/Single purchase, prepayments'.

### Work with settlement

Settlement header

**Settlement ID: 228**

Type: Udlæg /Enkeltkøb, forudbetalinger

Creation date: 25-10-19

Status:

Beskrivelse (Detaljeret): Introduction to the Travelsystem zExpense

By/Stednavn: SDU Kolding

User: John Fiktiv Doe

Unit: 816 - Biblioteket, Slagelse

**Dimensions**

Underkonto:

Omk 1: 816 - Biblioteket, Sla

Formål:

Projekt:

Analyse:

Omk 2:

Omk godkender: John Test Smith - Jol

Projekt godkender:

**Attachments**

Fill in these fields:

### Beskrivelse/ Description (Detailed):

Enter a detailed description. Just entering e.g. 'Exam', 'Course', or 'Meeting' will not suffice.

### By/Stednavn – Place:

Enter the city or location in the city you visited. (Required)

### Dimensions:

External users normally only have to fill in two fields here:

**Omk. 1** depends on the institute/department you work for, and will be filled in in advance, when you create your first settlement.

If, at a later occasion, you travel for a different department, it will be important for you to obtain a new number to enter here; so you can select the right person for approval.

### Omk godkender:

You **MUST** select an approver, or your settlement will end up at the head of an insitute or the dean.

### Projekt Godkender:

- Only used, if you know exactly that you have worked under a specific project number. In that case, Project number must also be filled in.



Click the green button  
'Add new expense'

 A screenshot of the "Add new expense" form. It is divided into three main sections: "Details", "Dimensions", and "Attachments".
 

- Details:** Includes fields for Date (25-10-19), Category (Bus tickets (141001)), Note, Currency Amount (48), Currency (DKK), Exchange rate (100), and Amount (48.00 DKK). At the bottom are "Save" and "Cancel" buttons.
- Dimensions:** Includes dropdown menus for Underkonto, Omk 1, Formål, Projekt, Analyse, Omk 2, Omk godkender, and Projekt godkender.
- Attachments:** Includes a green "Browse..." button and a blue "Attach files" button.

 A red arrow points from the "Browse..." button to the text below.

Fill in these fields:

**Date of the expense**

**Category:**

Select the right type from the drop-down menu

Take care to select the right category in relation to your expense. Don't mix categories. Train tickets should be under 'Train', and Taxi receipts under 'Taxa'.

**Note:**

Use this, if you need to add a remark to this expense.

**Currency Amount:**

Amount of the expense

**Currency:**

Defaults to DKK, but can be changed in the drop-down menu.

**Exchange rate:**

The daily exchange rate. You may change the rate manually, if you have documentation.

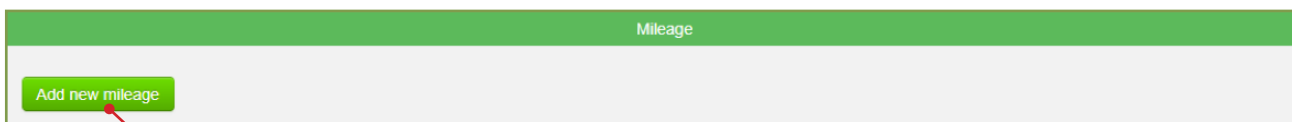
Attach your receipts under 'Attachments'

First, use the green button to browse for your files, then click the blue button 'Attach files'

Click 'Save'.

You must always attach a proper receipt, invoice, etc.

**Credit card slips, order confirmations, bank statements, etc. are not valid documentation.**



Click the green button 'Add new mileage'

**Add mileage**

**Mileage**

Date: 25-10-19

From: Home | Langelinie 17 | 7100 | Vejle | Danmark

To: SDU Alslon | Alslon 2 | 6400 | Sønderborg | Danmark

Distance: 122.12 km

Vehicle license plate: AB 12 345

Compensation: Standard

Note: [ ]

Buttons: Save, Continue route, Create return route, Cancel

### Date:

The travel date.

### From:

Fill in the place of origin and the address.

### To:

Enter the destination and the address.

The system will calculate the distance automatically, using Google Maps.

### Compensation:

Defaults to 'Standard' for car trips in Denmark. Using the drop down menu, you can also select transport by moped/bicycle or car trips outside Denmark.

### Vehicle license plate:

If you entered your license plate under private settings, the field will already be filled in. If not, fill in the field now.

To create a return trip, click 'Create return route'

**Add mileage**

**Mileage**

Date: 25-10-19

From: SDU Alslon | Alslon 2 | 6400 | Sønderborg | Danmark

To: Home | Langelinie 17 | 7100 | Vejle | Danmark

Distance: 122.12 km

Vehicle license plate: AB 12 345

Compensation: Standard

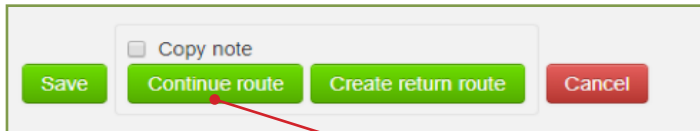
Note: [ ]

Buttons: Save, Continue route, Create return route, Cancel

The system automatically changes your data for the route back.

Now click 'Save'

## 5 Register mileage - continued

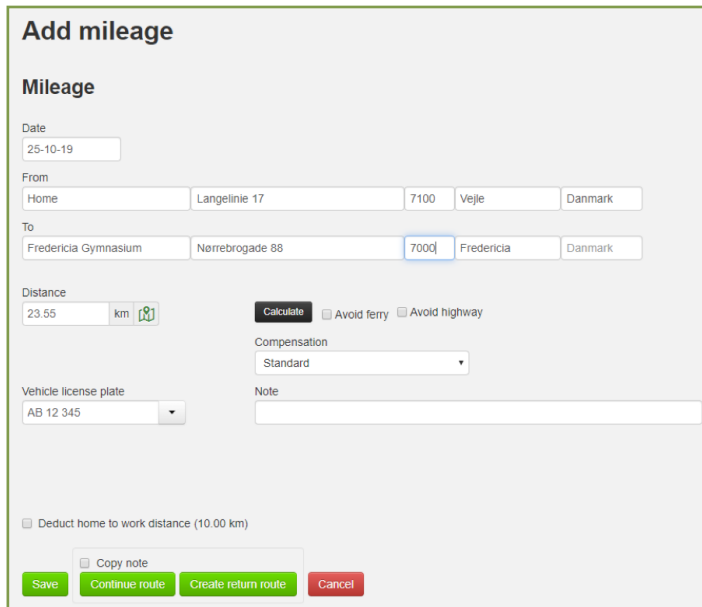


Copy note

Save Continue route Create return route Cancel

You also have the option to 'continue route'

Use this function if you travel to different addresses before reaching your end destination.



### Add mileage

#### Mileage

Date: 25-10-19

From: Home, Langelinie 17, 7100, Vejle, Danmark

To: Fredericia Gymnasium, Nørrebrogade 88, 7000, Fredericia, Danmark

Distance: 23.55 km

Calculate  Avoid ferry  Avoid highway

Compensation: Standard

Vehicle license plate: AB 12 345

Note:

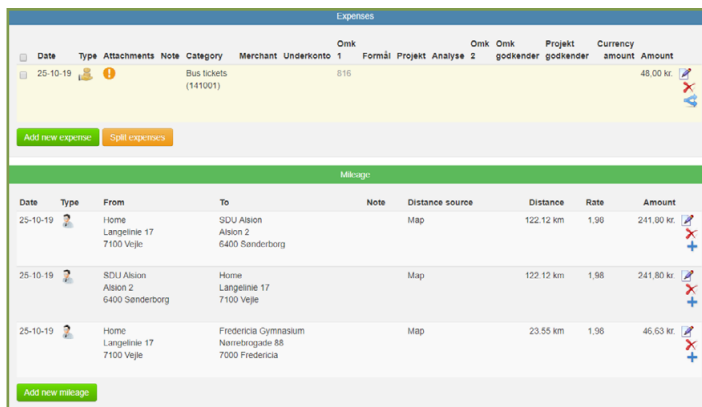
Deduct home to work distance (10.00 km)

Copy note

Save Continue route Create return route Cancel

Clicking the button lets you add a new/ extra address.

When you're done, click 'Save'.



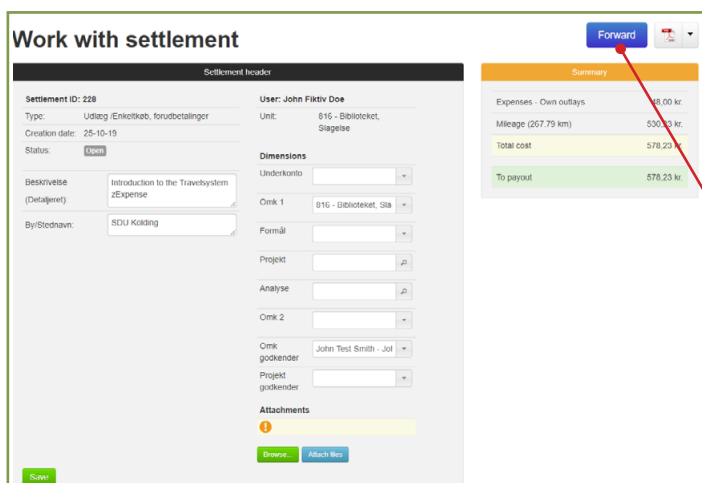
Date	Type	Attachments	Note	Category	Merchant	Underkonto	Omik	Omik	Omik	Projekt	Currency	Amount
25-10-19				Bus-tickets (141001)			816					48.00 kr.

Date	Type	From	To	Note	Distance	Rate	Amount
25-10-19		Home Langelinie 17 7100 Vejle	SDU Alsion Alsion 2 6400 Sønderborg	Map	122.12 km	1.98	241.80 kr.
25-10-19		SDU Alsion Alsion 2 6400 Sønderborg	Home Langelinie 17 7100 Vejle	Map	122.12 km	1.98	241.80 kr.
25-10-19		Home Langelinie 17 7100 Vejle	Fredericia Gymnasium Nørrebrogade 88 7000 Fredericia	Map	23.55 km	1.98	46.63 kr.

- and this is how your settlement will look now.

## 6 Forward for approval



### Work with settlement

Settlement ID: 228

User: John Fiktv Doe

Type: Udtag / Enkeltkab, forudbetaling

Unit: 816 - Biblioteket, Slagelse

Creation date: 25-10-19

Status: Open

Beskrivelse (Detailset): Introduction to the Travebystem zExpense

By/Stednavn: SDU Kolding

Dimensions: Underkonto, Omik 1, Omik 2

Omik 1: 816 - Biblioteket, Sla

Formål, Projekt, Analyse, Omik 2

Omik godkender: John Test Smith - Jot

Projekt godkender

Attachments

Forward

Summary

Expenses - Own outlays	48.00 kr.
Mileage (267.79 km)	530.23 kr.
Total cost	578.23 kr.
To payout	578.23 kr.

When you're done, you can press the 'Home' or 'Page up' key on your keyboard, to return to the top of your settlement.

Click the blue button 'Forward', and your settlement will be sent on for approval.