

Create a New Claim

1. The Creation Dates are when the claims were submitted, not necessarily the date of the expense.
 - › These will default to today's date and 30 days prior, but can be changed as required.
 - › A period of 90 days maximum may be viewed at one time.

Reset Clear Search My Worklist Create New Claim

Worklist Selection

Creation Date: * 2015/08/15 To 2015/09/14

Created By (User): * DEM1234

Employee ID: 00969329 To

Status: To

Trip No.: To

2. The Created By (User) and Employee ID will default to yourself.

On the Worklist Selection screen, click the 'Create New Claim' button

Reset Clear Search My Worklist Create New Claim

Worklist Selection

Creation Date: * 2015/08/15 To 2015/09/14

Created By (User): * DEM1234

Employee ID: 00969329 To

A box will pop up where you will enter the employee number and date range for the new claim.

- › All fields are mandatory
- › As on the worklist, the Employee Number will default to yourself

Create New Claim

Employee Number: * 00969329

Date From: * Date To: *

OK

Click OK to continue. A new window will open where you will enter your claim information.

IMPORTANT:

Once a trip is created with these dates, they will no longer be available for additional claims. Ensure you only enter dates for claims being submitted on this trip, even if it is only one day.

For example, if you are submitting expenses for Jul 13th, 14th, and 15th you would enter:

Date From: * 2015/07/13 Date To: * 2015/07/15

Header Data

Your employee number, name, union affiliation, country and currency will automatically be populated

▸ If your union or country is incorrect, please contact **Employee Services @ 1-866-319-3900**.

Business Allowances - Create trip

Trip Number: 0000000000

Header Data

Employee

Employee Number: 00969329 | Name: 1 EMPLOYEE | Union: CP - MWED | Province: Saskatchewan | Country: CA | Currency: CAD

Trip Dates and Cost Allocation

* Date From: 2015/07/13 | * Date To: 2015/07/15 | Cost Center: 2018 | Order: | Network: | Activity: |

Approver

Approver: HIC1234 | Approver 1 | Comments: |

1. In the Province field, select Saskatchewan - Hit your "Enter" button on your keyboard to populate below
2. The Trip Dates will be populated with the date range you entered on the previous screen
3. Type in Cost Centre 2018 ▸ Hit your "Enter" key to populate below Data fields
4. The approver field will default based on your SAP hierarchy
 - If this is not your approving manager or if another manager will be approving your claim in his absence, enter the new user ID and click enter to populate the manager name

NOTE: Only managers with the proper approval access and authority will be accepted in this field
5. Select "**Other Canada**" from the drop down menu

Click the drop down beside View to select the layout that best applies for you

Item Data

View: [Standard View] ▾

Export | Insert Row | Delete Row | Copy Row

Order	Network	Activity	Allowances 1	Allowance Amount 1	Allowance Desc. 1	Allowances 2	Allowance Ar
			▾	0.00		▾	
			▾	0.00		▾	
			▾	0.00		▾	
			▾	0.00		▾	
			▾	0.00		▾	

Enter the Expense Date

Under the Expense Date column, enter the date of your claim. This is the date the allowance/expense was incurred.

Item Data				
View:	Engineering Canada	Export	Insert Row	Delete Row
Expense Date	Region	Allowances 1	Allowance Amount 1	Allo
2015/07/13	ALTA		0.00	
	ALTA		0.00	

Copy Row

If you will have similar claims for additional dates, you can also copy a row. All of the fields from the highlighted line will copy to a new row, and only the date will need to be updated.

1. Highlight the row you wish to copy
2. Click the Copy Row button
3. Change the date accordingly

Item Data					
View:	Engineering Canada	Export	Insert Row	Delete Row	Copy Row
Expense Date	Region	Allowances 1	Allowance Amount 1	Allo	
2015/07/13	ALTA	PDA PER DIEM AD HOC ALLOWANCES MoW	106.10		
2015/07/13	ALTA	PDA PER DIEM AD HOC ALLOWANCES MoW	106.10		
	ALTA		0.00		

NOTE: The items on a copied row may still be edited or changed before Parking or Submitting

Entering an Allowance



1. Under the first Allowance column, click the drop down to select the allowance you are claiming
2. In the Allowance Amount, enter the dollar amount of the allowance being claimed

If your collective agreement has a defined amount for this allowance it will populate automatically

E.g. MWED Laundry = \$ 7.00 (2015)

- Defined amounts may be edited however it is recommended you add a description indicating why the amount was changed

3. OPTIONAL:

A brief description may be typed in the Allowance Desc column. This field will be displayed when your manager views the claim details in the approval process.

Expense Date	Region	Allowances 1	Allowance Amount 1	Allowance Desc. 1
2015/07/13	ALTA		0.00	
	ALTA	FMA 1st MONTH'S LODGING ALLOW MoW		
	ALTA	LAUN LAUNDRY		
	ALTA	MA MEAL ALLOWANCE/EXPENSE		
	ALTA	MLA MONTHLY LODGING ALLOWANCE MoW		
	ALTA	PDA PER DIEM AD HOC ALLOWANCES MoW		
	ALTA	RRDE REGION REST DAY EXPENSE		

Entering Mileage

To submit a mileage claim, you must provide the start and end location, distance travelled, and mileage type.

Start Location 2	End Location 2	Total Mileage 2	Mileage Comments 2
Alyth	Vulcan	120	

1. Type in your Start Location and End Location under the appropriate columns
2. Enter the mileage travelled between these locations
 - ›Decimals are not accepted and must be rounded up
 - ›Mileage units will default based on your country: Canada = km
3. Mileage Comments are optional unless the mileage is greater than 750, then they are mandatory
4. Under the Mileage Type column, click the drop down to select the type of mileage being claimed

Mileage Type 2	Work Cycle/Rule 2
A PAR (Personal Auto)	
W Weekend Travel (M/W)	

Par Mileage

If A PAR (Personal Auto) is selected, no other fields are required and the mileage claim is done

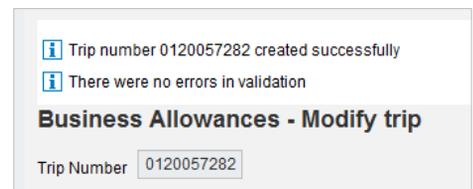


The Park button saves your Trip with the details you've entered and generates the Trip Number for this date range

- › A parked trip has not yet been submitted and may still be edited or deleted
- › It is also used before adding attachments or additional comments

When you click Park:

- › A confirmation message will appear at the top of your screen indicating the Trip has been created successfully
- › The Trip Number will be populated



Once the Trip number has been created, you can click the Back button to exit or continue with your next action.

Entering Miscellaneous Expenses

Miscellaneous expenses are typically claims when a receipt amount will be reimbursed. Depending on your bargaining agreement, this could include meals, cab fare, parking, flights, etc.

NOTE:

- › Crew hotels will continue to be booked and charged through the Hotels Group and will not be claimed as individual expenses.

All three (3) fields must be populated when entering a Misc. Expense

1. Under the Misc. Expense column, click the drop down and select the type of expense you are claiming
 - › See appendix for the full list of Misc. Expenses
2. Enter the amount of the expense in the Misc. Amount column
3. Type in a brief explanation in the Misc. Reason column

Misc. Expense 1	Misc. Amount 1	Misc. Reason 1
<input type="text"/>	0.00	<input type="text"/>
AIR AIRFARE		
CAB CAB FARE		
CAR RENTAL CAR		
COUR COURSES/SEMINARS/CONFERENCES		
GAS AUTOMOTIVE FUEL		
HOME HOME RELOCATION-NO TRAVEL COST		
HTL HOTEL,APARTMENT		
ING INGENUITY AWARDS		
MISU MISCELLANEOUS UNION		
MOVE MOVEMENT OF HOUSEHOLD GOODS		

IMPORTANT:

Many Miscellaneous Expense claims will require an attached receipt before you can to submit the Trip for approval.

Instructions for attaching receipts can be found in Claim Actions on page 19.

It is recommended that you scan any receipts you will be claiming before you begin your entries

- › See appendix for guidelines on scanning and saving files for attachment
- › Attachments can be in either PDF or JPEG format, and each file cannot exceed 999KB
- › A standard 8 ½ x 11” black & white scanned document from a CP scanner is typically less then 100KB

Claim Actions

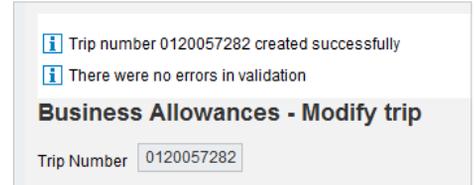


The Park button saves your Trip with the details you've entered and generates the Trip Number for this date range

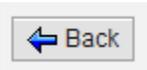
- ▶ A parked trip has not yet been submitted and may still be edited or deleted
- ▶ It is also used before adding attachments or additional comments

When you click Park:

- ▶ A confirmation message will appear at the top of your screen indicating the Trip has been created successfully
- ▶ The Trip Number will be populated

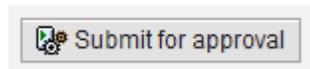


Once the Trip number has been created, you can click the Back button to exit or continue with your next action.



The Back button closes the claim screen and returns you to your worklist.

- ▶ If you are on a new claim and have not parked it, any information you have entered will not be saved
-



The Submit for approval button saves your Trip, generates the Trip Number (if was not already parked), and submits the Trip to your manager for approval.

When you click Submit for approval:

- ▶ A notification will be sent to your manager advising them your submission requires their approval
- ▶ You will be returned to your worklist

IMPORTANT:

- ▶ Once you Submit you will no longer be able to edit this Trip. It will be available on your worklist to display or simulate only.
- ▶ If you need to correct a submitted claim, you must have the manager reject it. This will allow you to open it from your worklist, make the correction, and resubmit the claim. PR05 must not be used to correct or delete a claim as this will cause an error and the claim will become locked out.
- ▶ If you are not ready to submit this claim, you can click Park to save the Trip and return to submit it another time.

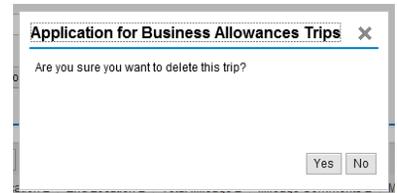
 Delete Trip

The Delete Trip button will delete a new or parked claim

- › Any information you have entered will not be saved
- › Only new (unsaved), Parked, or Rejected Trips can be deleted
- › The option to delete is useful so that you do not 'use' dates that you may need for other claims

When you click Delete:

- › A pop-up will open asking if you want to delete the Trip
 - Click Yes to continue or No to cancel
- › If you select Yes, you will be returned to your worklist and the Trip will have been deleted



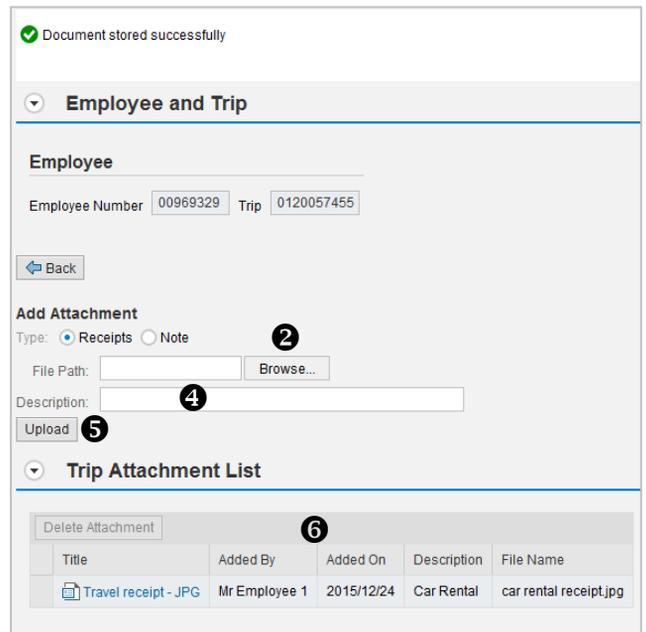
 Attachments

The Attachments button will open a screen where you can attach copies of receipts and add additional notes directly to the Trip. Your manager will be able to view these when they approve the submission.

IMPORTANT: You must Park the claim to save it and create the Trip Number before adding an attachment

Attaching a File - Before you begin, ensure receipts have been scanned and saved as a JPEG or PDF file

1. Click the Attachments button
 - › The Employee and Trip screen will open indicating your Employee Number and the Trip number
2. Click Browse to open your documents folder on your computer
3. Click on the file you want to attach and then click Open. You will be returned to the Employee and Trip screen and the file path will be populated.
4. A description or name can be typed in the Description field to identify the attachment
 - › This is useful if you are attaching multiple files
5. Click the Upload button to attach the file
6. A confirmation will be displayed at the top and the file will now show on the Trip Attachment List



Document stored successfully

Employee and Trip

Employee

Employee Number 00969329 Trip 0120057455

[Back](#)

Add Attachment

Type: Receipts Note

File Path: [Browse...](#)

Description:

[Upload](#)

Trip Attachment List

Delete Attachment				
Title	Added By	Added On	Description	File Name
 Travel receipt - JPG	Mr Employee 1	2015/12/24	Car Rental	car rental receipt.jpg

When you have finished attaching your file(s), click the

 Back

button to return to claim screen.

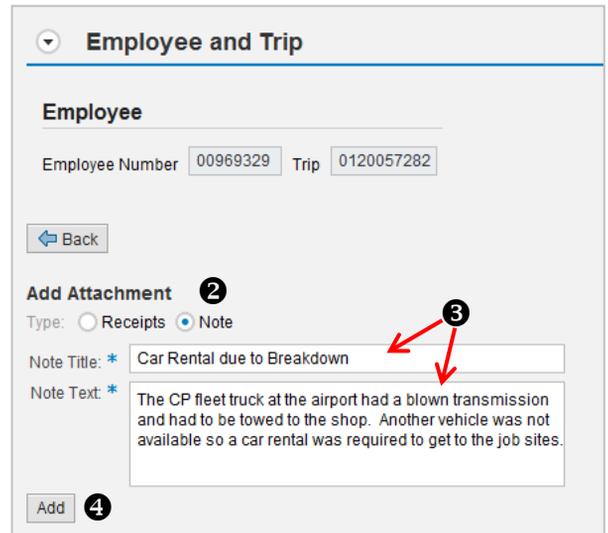
Adding a Note

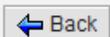
If required, a more detailed note can be attached to a Trip

1. After you have parked your Trip, click the Attachments button
 - The Employee and Trip screen will open indicating your Employee Number and the Trip number
2. This screen will default to Receipts. Click the radio button beside Note to change this field
3. Type in the Title and Text of the note you wish to attach. Both fields are mandatory.
4. Click the Add button to attach the note
5. The note will now show on the Trip Attachments List



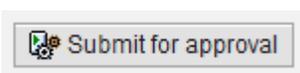
Title	Added By	Added On	Description	File Name
Car Rental due to Breakdown	Mr Employee 1	2015/12/24		



When you have finished attaching your note, click the  button to return to claim screen.

NOTES:

- Attachments and notes may be viewed by double-clicking on the title in the Trip Attachment List
- To delete a not or attachment, click on the on the line to highlight it and then select Delete Attachment



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