



**WorkPlace**  
**Employee Expense**

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## Overview

The WorkPlace Expense module gives NTPC the ability to track employee travel and expense claim costs while allowing the employee to quickly enter their expense claim from any remote location with a web browser using the easy-to-use WorkPlace interface.

Expense claims are sent to an approver before payment.

Please note that expense claims are to be made in accordance with NTPC travel policies. These policies can be found on the [Powerline](#):

- [HR-26](#) – Travel (including Medical Travel)
- [HR-26a](#) – Travel Rates
- [HR-26b](#) – Travel Procedures
- [HR-12](#) – Training and Professional Development
- [HR-2-13](#) – Relocation

Additional forms and information on medical can be obtained from the HR department and can also be found on the [Powerline](#).

## Accessing Workplace

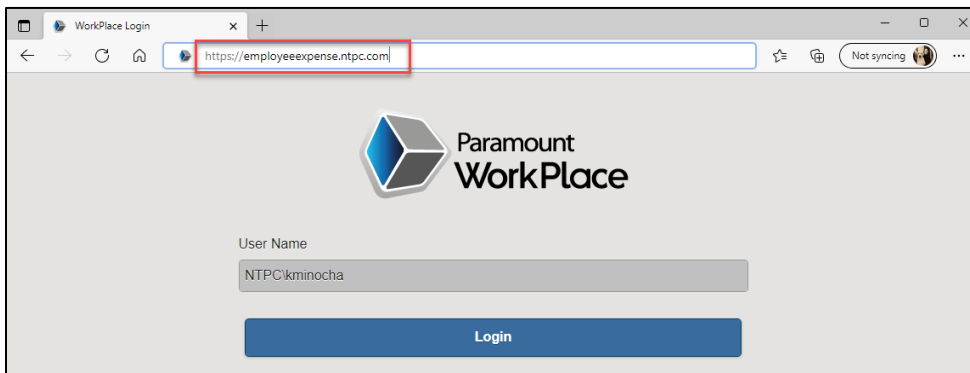
### Internally

WorkPlace can be accessed internally from Powerline on the home page by clicking the WorkPlace link under Key Links.

### Externally

WorkPlace is accessible from any computer internal or external to the Corporation's network if your device has an internet connection.

1. Open an Internet browser.
2. In the address bar type <https://employeeexpense.ntpc.com> and press enter.



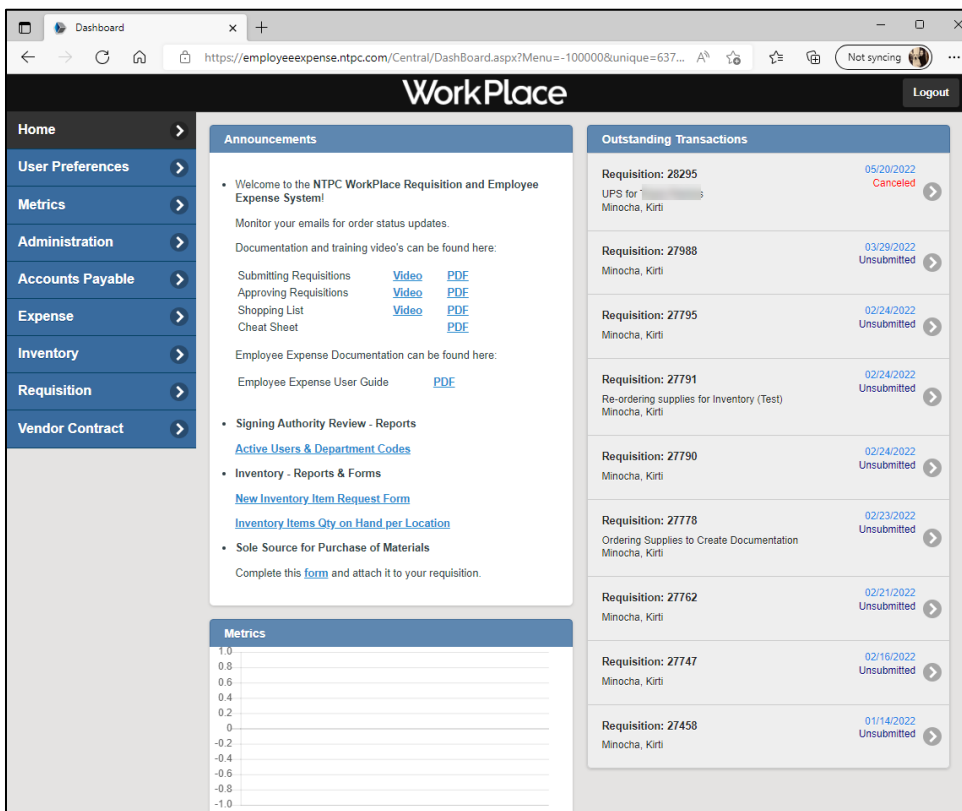
3. You will be prompted to enter your NTPC login information (the same username/password that you login to the computer). Enter your username in the form `NTPC\xxxxx` and your password.

## Create or Edit Expense Claims

Creating a new expense claim is the first step in the expense claim workflow. You can also edit existing expense claim by selecting any expense item under the Outstanding Transactions heading on the dashboard. Open expense claim are those that have already been created but have not yet been submitted for approval.

1. After logging into WorkPlace, you will be on the home screen.

Based on security, your home page will vary with available options.



2. On the WorkPlace home page, select **Expense** from the menu.



3. To enter a new expense, select **Expense Entry**.

Transactions	
Expense Entry	➤
Find Approval Session	➤
Find Expense Sheet	➤

A blank expense entry form will open.

**4. Claim Type** - Use the magnifying glass to select a claim type.

- a. Travel/Expense Claim
- b. Medical Travel Claim
- c. Relocation Expense Claim
- d. Education or Apprenticeship

Travel/Expense claims will be routed to your manager for approval. All others will be routed to Human Resources for approval.

**5. Enter the Expense Sheet Name.**

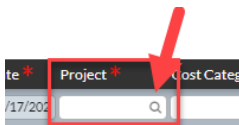
**MUST be completed in the format "Date, Location, Reason for Travel"**

example: March 15, 2022, Fort Simpson, IT Installations

## Enter the Line Details of the Travel Claim

Line	Status	Delete	Date *	Project *	Cost Category *	Expense Type *	Description	Qty *	Price	Currency *	Amount
			06/17/2022							Z-C\$	\$ 0.00

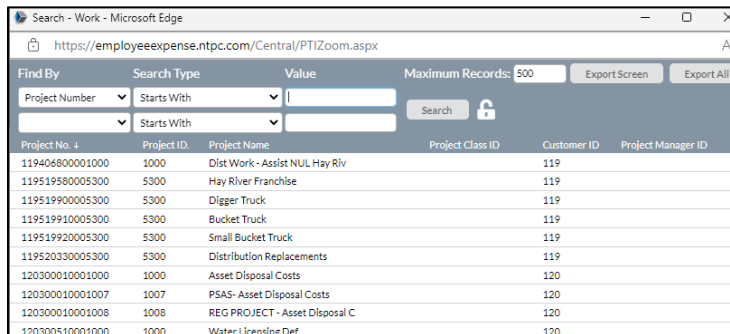
### 6. Enter the Project – this is the project number that your expense is being charged to.



A screenshot of the 'Project' field in the travel claim form. A red arrow points to a magnifying glass icon next to the input field, indicating the search function.

You can generate a list of projects by clicking the magnifying glass or manually typing the project number in the field.

If you click the magnifying glass, it will open a search window listing all projects.

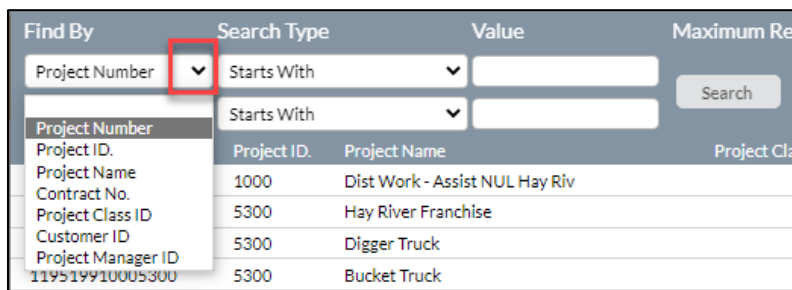


A screenshot of a search window titled 'Search - Work - Microsoft Edge'. The URL is 'https://employeeexpense.ntpc.com/Central/PTIZoom.aspx'. The search criteria are set to 'Find By: Project Number' and 'Search Type: Starts With'. The search results are displayed in a table with columns: Project No., Project ID, Project Name, Project Class ID, Customer ID, and Project Manager ID.

Project No.	Project ID	Project Name	Project Class ID	Customer ID	Project Manager ID
11940680001000	1000	Dist Work - Assist NUL Hay Riv		119	
119519580005300	5300	Hay River Franchise		119	
119519900005300	5300	Digger Truck		119	
119519910005300	5300	Bucket Truck		119	
119519920005300	5300	Small Bucket Truck		119	
119520330005300	5300	Distribution Replacements		119	
120300010001000	1000	Asset Disposal Costs		120	
120300010001007	1007	PSAS- Asset Disposal Costs		120	
120300010001008	1008	REG PROJECT - Asset Disposal C		120	
120300510001000	1000	Water Licensing Def		120	

Search for a project by specifying search criteria.

Use the **Find By** drop down to select what data element you would like to search by.



A screenshot of the search window with the 'Find By' dropdown menu open. The dropdown menu shows options: Project Number, Project ID, Project Name, Contract No., Project Class ID, Customer ID, and Project Manager ID. The 'Project Number' option is selected and highlighted with a red box.

Use the **Search Type** to select how it will look for your value.

Find By	Search Type	Value	Ma
Project Number	Starts With		
	Starts With		
	Contains		
	Ends With		
Project No. ↓	Is Equal To	at NUL Hay Riv	
119406800001000	Is Not Equal To		
119519580005300	Is Greater Than	ise	
119519900005300	Is Greater Than Or Equal To		
119519910005300	Is Less Than		
	Is Less Than Or Equal To		

Type in your value and click **Search**. Double click to select the correct project number.

Find By	Search Type	Value	Maximum Records: 500	Ex
Project Name	Contains	Appd		
	Starts With			
Project No. ↓	Project ID	Project Name	Project Class ID	Customer ID
350816600001001	1001	IT Apps and Support Prev		350
350816600001002	1002	IT Apps and Support Corr		350
350816600001003	1003	IT Apps and Support Emerg		350

**7. Enter the Cost Category** – use the magnifying glass to search for your cost category.

Project *	Cost Category *	Expense

You will be presented with cost categories associated with the project you selected in step 1.

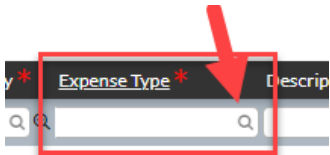
Find By	Search Type	Value	Maximum Records: 50
Cost Category ID	Starts With		
	Starts With		
Cost Category ID ↓	Cost Category Name		
5301.0008	Materials		
5303.0008	Vehicle & Equipment Rental		
5402.0008	Utilities- Phone/Fax/Services		
5720.0008	Travel		
5730.0008	Accommodation		
5740.0008	Meals & Entertainment		

Select the correct cost category for the item you are claiming.

**If you do not see the correct project and/or cost category, please submit a request through [K2](#) or by emailing [AccountSetupTimesheet@ntpc.com](mailto:AccountSetupTimesheet@ntpc.com).**

**Please wait for the project or cost category to be setup before making a claim.**

**8. Enter the Expense Type** – use the magnifying glass to choose the appropriate expense type.

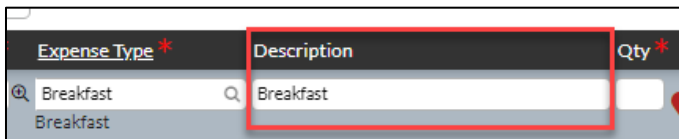


The expense types will be listed with preconfigured values. Double click to select the correct one.

Expense Type ID	Description	Tax Schedule	Price
Accommodation	Not Private Accommodation	GST INCLUDED	\$ 0.00000
Basic Mileage	Basic Mileage without Receipts Travel to and from airport	GST INCLUDED	\$ 6.00000
Breakfast	Breakfast	GST INCLUDED	\$ 21.00000
Cell Reimbursement	Cell Phone Monthly Reimbursement	GST INCLUDED	\$ 30.00000
Child Care	Child Care	NO TAX	\$ 0.00000
Equivalent Airfare	Equivalent Airfare - Lower of km and flight cost	GST INCLUDED	\$ 0.00000
Flights	Flights (cost of flights not paid for by p-card)	GST INCLUDED	\$ 0.00000
Incidentals	Incidentals	GST INCLUDED	\$ 19.00000
Lunch	Lunch	GST INCLUDED	\$ 21.00000
Mileage outside NT	Mileage outside NT	GST INCLUDED	\$ 0.53000

Note that some items like basic mileage, incidentals and meals are pre-populated with rates based on the travel policies. If you are claiming actual meal expenses, you can override the daily rates if your meal is for more than one person if the total cost does not exceed the policy limits per person. Expense types for taxi, accommodation, flights, and others are not pre-populated and you must enter the amount from your receipt.

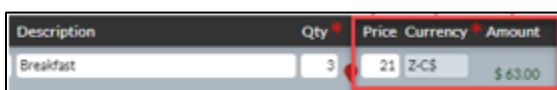
- Description fields is auto populated** after expense type has been selected in step 3. To edit this field, click inside and begin typing.



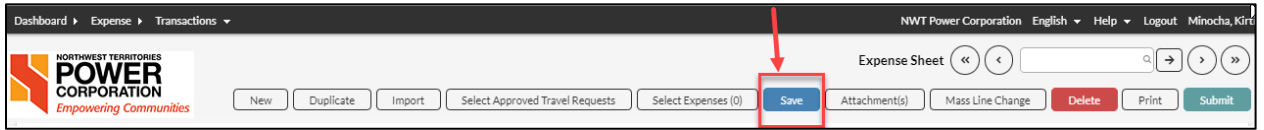
- Enter the Quantity** – if you had 3 lunches, enter 3 in Qty rather than separate line items for each meal.



- Price, Currency and Amount** – the price will pre-populate if set from the expense type. Otherwise, enter in the price and the Amount will be calculated (Price x Qty = Amount).



**12. Click Save.**

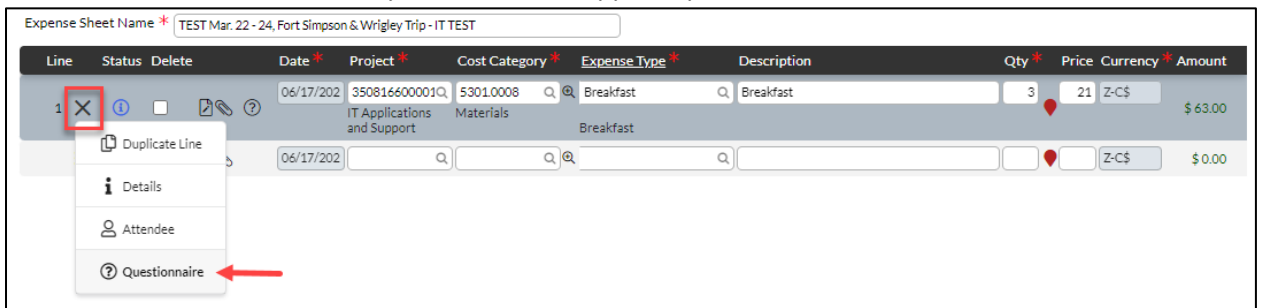


If you are claiming breakfast or suppers, you are required to fill in the questionnaire note indicating departure and arrival time. Save your work and follow the instructions below

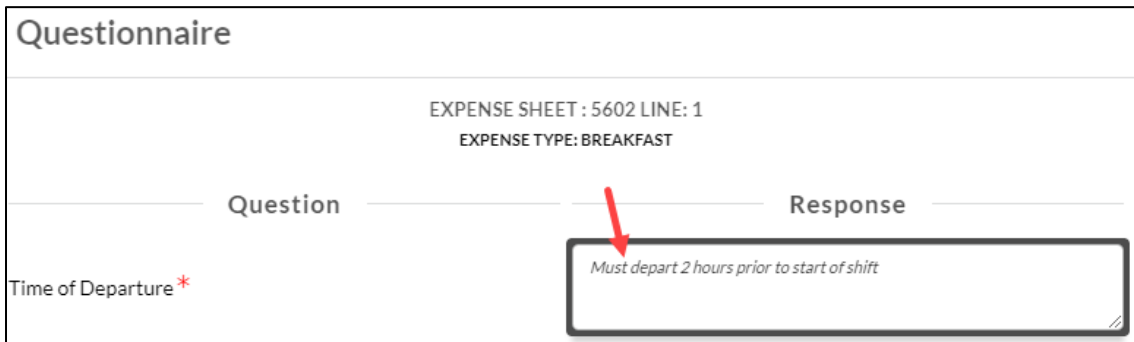
**Fill in Questionnaire**

The questionnaire is required for claiming breakfast/supper.

**13. Click the  waffle menu on your breakfast/supper expense line to select Questionnaire.**



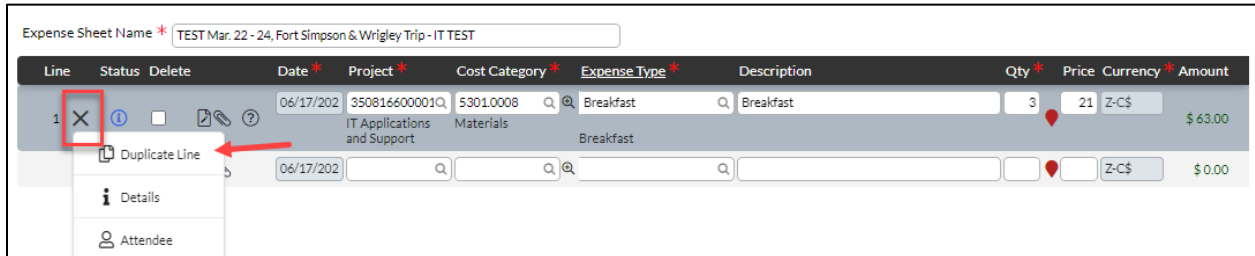
**14. Click in the Response box and type the time of departure.**



**15. Click Save.**

## Enter Additional Lines

To enter additional lines on your expense claim, you can simply begin entering the project number on the next line in the claim OR you can use the more options menu (☰) to select the **Duplicate Line** option. This will pre-populate the next line number with the information you entered on the previous line. Once duplicated, you can edit any of the fields as required.

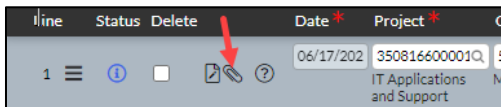


## Attaching Receipts

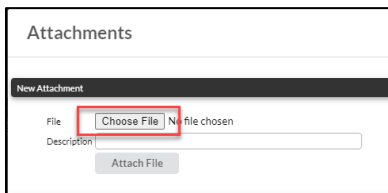
When receipts are required to be submitted, you first must scan or photograph the receipts. It is a good idea to scan/photograph these before starting your expense claim and save the files on your computer in a location you can easily remember (e.g., your desktop).

**Receipts are required to be submitted for claims for taxi, accommodations, and other items in accordance with NTPC travel policies.**

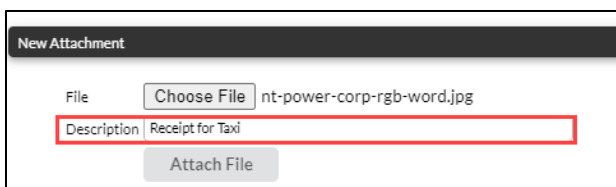
1. Click the paperclip icon on the appropriate expense line.



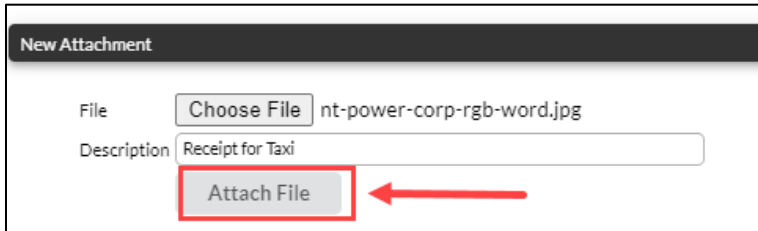
2. Click Choose File and select the scanned/photographed image of the receipt.



3. Enter a description.



**4.** Click **Attach File**.



New Attachment

File  nt-power-corp-rgb-word.jpg

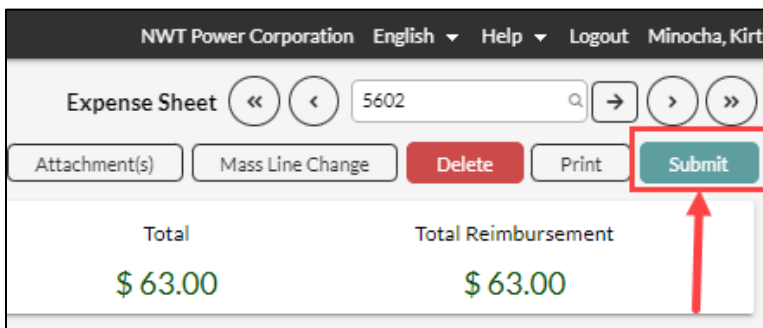
Description

**5.** Click **Save & Close** at the bottom.

### Submit Your Expense

Once you have **entered all your expense details, filled in your questionnaire** (if you have submitted meals) and **attached your receipts**, you are ready to submit your expense claim.

**1.** Click **Submit**.



NWT Power Corporation English Help Logout Minocha, Kirt

Expense Sheet << < 5602 > >>

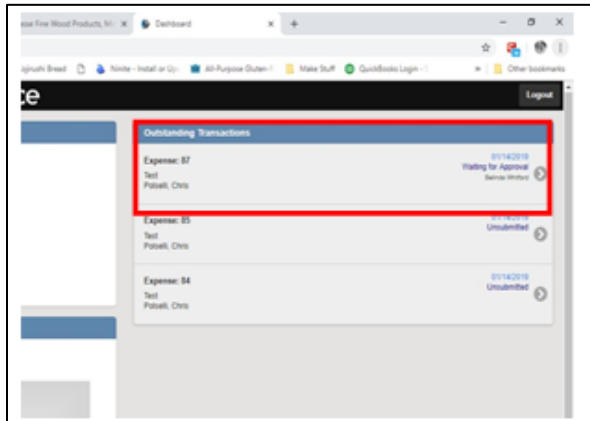
Total	Total Reimbursement
\$ 63.00	\$ 63.00

Once your claim has been reviewed by your manager or human resources and they approve or deny your claim, you will receive an email notification. If your claim has been denied, you will receive email notification with a note stating the reason for denying. You can resubmit the form after making changes and or corrections to the form.

## Tracking Your Submitted Expense Claims

### Waiting for Approval

Your submitted expense claim will appear under Outstanding Transactions with the status **Waiting for Approval**.



An email has been sent to the appropriate approver(s).

If you wish to recall an expense claim to make changes or to cancel it, open the expense claim and click the **Recall** button.

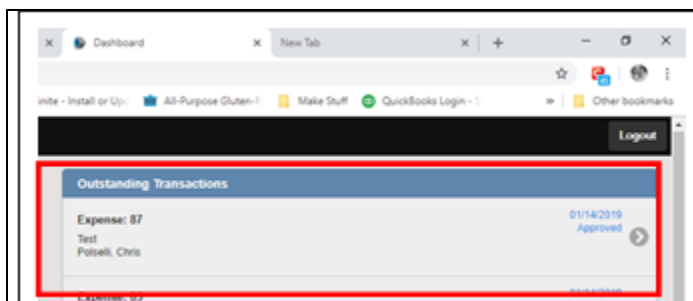


You will be prompted for confirmation.

You will now be able to make changes to the expense claim and resubmit it or delete it.

### Approved

Once your expense claim has been approved, it will appear in your Outstanding Transactions with the status **Approved**.



You will also receive an email confirmation once your expense claim has been approved.

If you click on the expense claim number link in the email, it will take you to workplace and directly to the expense claim.

At this point, you can still recall an expense claim to make changes or to cancel it. Click the **Recall** button.



## Disapproved

If your expense claim has been disapproved, you will receive an email and it will appear in your Outstanding Transactions list with the status **Disapproved**. Disapproved expense claims will remain in your Outstanding Transactions list until you delete them or make changes and resubmit.

## Viewing Expense Sheet Details

To identify where your expense claim is in the workflow, you can click the more options menu and select Details to see the approval status and routing details.

The approval status and detailed routing will appear at the top of the detail window. If it is still waiting to be approved, the approval path will be shown.

EXPENSE SHEET : 5593 LINE: 1

STATUS:EXPENSE SHEET SUBMITTED

**Approval Path**

\*Note: Arrow indicates next pending approver, or role.

Approval List	Approver/Role	Assigned Alternate Approvers
MgrTDHydro - T&D Manager, Hydro Region		
	Penney, Grant	
		Hazenberg, Darren
AP - Accounts Payable		
	▶ Dean, Donna	
	▶ Coleman, Jennifer	

**Log:**

06/17/2022 11:43:14 AM		APPROVED as ALTERNATE for (ntpc\gpenney)
06/17/2022 08:58:01 AM		SUBMITTED