ROYAL COLLEGE OF PHYSICIANS AND SURGEONS OF GLASGOW

ZETADOCS Expenses – Account registration and login

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System: Zetadocs Expenses

Process: User Account registration and login

Video tutorials: User Account Registration

Overview

Zetadocs Expenses is an online expense submission platform that enables users to submit their expense claims via a dedicated website or using their mobile devices. The software allows users to create Expense Claims for various types of expenditure incurred while travelling on College business and combine them into a monthly Expense Report that should be submitted to the College for approval, processing and payment.

This document explains how to complete the initial user account registration and log in to the website for the first time.

Step by step procedure

Please note that the below step by step procedure is covered in the 'User Account Registration' tutorial video available on the College website.

https://rcpsg.ac.uk/help/expenses

Access Zetadocs Expenses website or Zetadocs App

Zetadocs Expenses website can be accessed by clicking on the below link. You may want to consider bookmarking this link or adding it to Favourites in your browser if you are a frequent Expenses user.

https://expenses.zetadocs.com/index.html#/login

Alternatively, if you are looking to use the Zetadocs software on your mobile devices, please download the Zetadocs Expenses mobile app (the application is available for both iPhones and Android devices).

Register as an Expenses User with the College

In order to start using the new Expenses system, you will have to register as an expenses user with the College. Please follow the below steps to allow College staff to create and activate your user account on the Expenses system.

1. Please follow the below link to access a secure web form on the College website and provide mandatory information required to create your user account and enable expense reimbursement to your bank account:

   https://rcpsg.ac.uk/forms/bank-details

   Information required:

   - Name
   - Surname
   - Email address
   - PID (if applicable)
   - Bank details (for bank transfer of the reimbursed expense value)

   Once completed, your registration form will be forwarded to College Finance, who will activate your user account on Zetadocs Expenses. You should receive an automated email notification from Zetadocs, asking you to set up a password and start using the application, within 24 hours from registration.

   Data Protection Note: The following personal information will be securely stored within the expense system website with the sole purpose of facilitating expense reimbursement and distribution of automated status notifications: name and email address. Users' postal addresses and bank details, which are required to make expense payments, will be held within our systems in-house, behind appropriate firewalls and securely protected. This information will never be shared with a third party, with the exception of facilitating expense payments through our bank. User data will be deleted from the system after twelve months of inactivity.

Complete Registration and initial Log In

When a new expense user is created in the system, an automated invitation is sent out to the contact email address they provided at registration via the web form. This should normally happen within 24 hours of registration. Please note that the invitation link is valid for
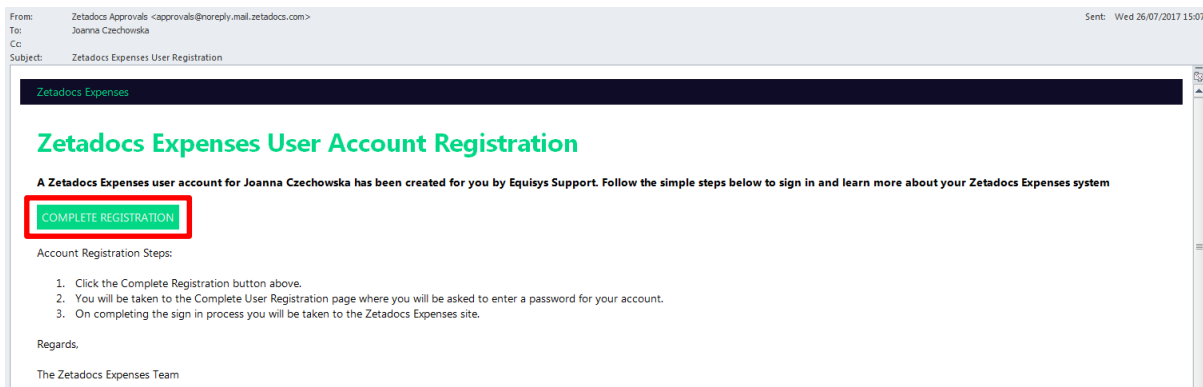
24 hours only, after which it expires and would need to be resent to the user to enable them to activate their account.

The below example shows an activation email received by a newly created expense user:
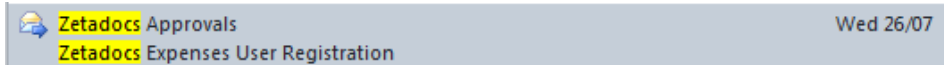
In order to complete your registration, please open the email and click on Complete Registration:


You will be taken to the Zetadocs Expenses registration site. Please enter and confirm the password you will use to log into the system going forward.

Please note that your Zetadocs User Account name will be provided – it will most likely be structured as follows: name.surname@rcpsg.ac.uk. Please note that this is NOT a College email address but a user name (Zetadocs login). Your personal email address submitted through the web form will be used to send any notifications/communication from the Expenses system.

Zetadocs User Account: Please take note of your user account – you will need this information to log in to the website going forward.

Zetadocs Password: Please create and memorise/save your password – you will need this information to log in to the website going forward.

Once completed, you will be taken to the Zetadocs main dashboard. In order to log in with the newly created credentials, pick the 'Sign In' option in the top right corner:
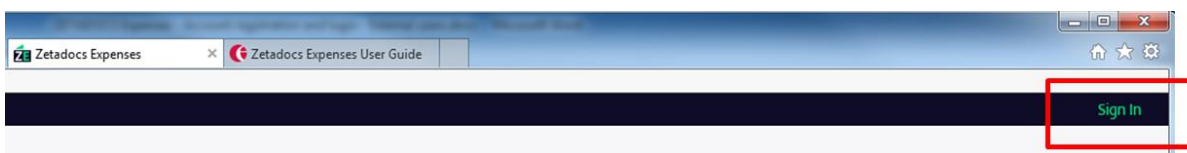
Sign in using your Zetadocs credentials: Zetadocs User Account (provided in the original Setup – please see above) and the password you created.

You can use the following link to access the sign in page at any point:

https://expenses.zetadocs.com/index.html#/login

Having logged in successfully, you will be taken to the Home screen of the application:

Please find some general comments on the various sections of the Home screen below:

Expenses section

❖ **New Expense** – allows users to create a new Expense Claim related to a cash/card payment or car mileage
❖ **New Report** – allows users to compile their Expense Claims for submission to the College processing Teams. Once approved, your report will be processed for payment
❖ **Submit Report** – allows users to submit any report drafts they have previously saved without submitting

Summary section

- ❖ **Draft expenses** – enables users to quickly access saved Expense Claims that have not been included in any Expense Reports and submitted for processing
- ❖ **Unsubmitted Reports** – enables users to review reports created and saved but not yet submitted for processing
- ❖ **Awaiting Approval** – this section will show all reports submitted for processing, currently awaiting approval
- ❖ **Rejected reports** – enables users to review any expense reports that have been rejected, alongside notes from the College approvers on what information should be added or amended. Once amendments have been applied, users will be able to resubmit the corrected report for approval and processing

Please refer to process documents and video tutorials covering creating and saving Expense Claims, Itemizing Expense Claims and submitting Expense Reports for processing and payment for further details.