

RAMP
Consultant User
Guide

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Ramp Frequently Asked Questions

1. Q: I am having issues logging into my Ramp account. What should I do?

A: Please try to use the Forgot Password link to reset your password.

2. Q: Can I submit an Excel Document as a receipt for expense reimbursement?

A: Ramp doesn't support Excel files for receipt uploads. It only supports pdf or jpeg.

3. Q: Can I submit multiple expenses/reimbursements in one report?

A: There isn't a way to combine expenses into one report since technically Ramp is considered a transactional system and is essentially doing away with expense reports. You will need to submit expenses separately. Managers do have the option to bulk approve expenses though.

<https://ramp.com/legal/privacy-policy>

Consultants

1. Expense Submission

All consultants should read and understand the Company's Expense Policy in full and adhere to the spending guidelines.

These guidelines include:

- Getting approval for spend that falls outside of the Expense Policy and/or Budget directly through Ramp
- Submitting necessary information and receipts following the transaction

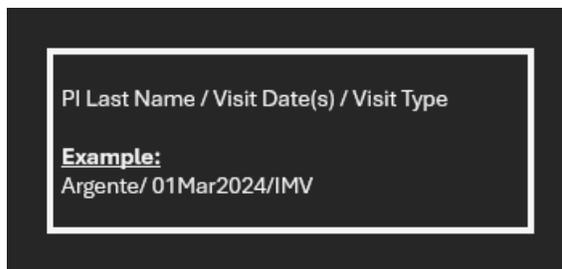
1.1 Password Login

You will log into Ramp with a password. You will receive a Ramp invite to your personal email address to accept the invitation. Once you accept the invitation, you will create a password to use to login.

1.2 Creating a Trip

You will use the **"Create a Trip"** feature in Ramp to assign all applicable expenses matching that trip.

For Standard Users: The naming convention of the Trip should follow the format below. If you have any questions on naming convention, please contact your line manager or expense approver.



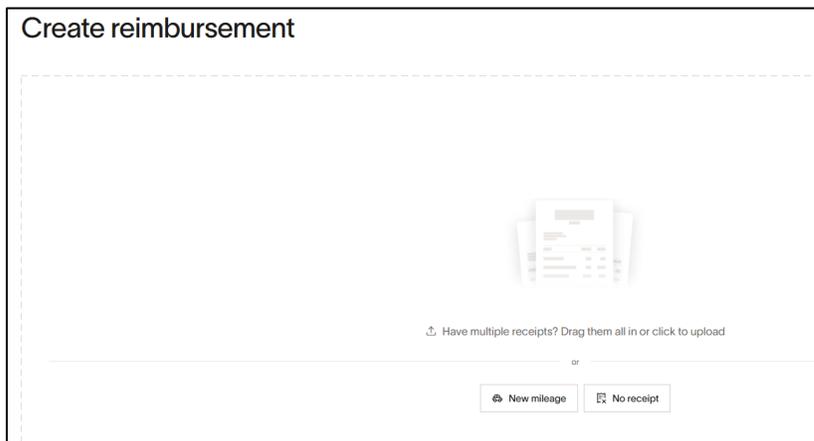
For Abbott: Please ensure that trips follow the below naming convention per Abbott Guidelines:

- **Expense Report Name** (Client name_Study_Location_Last Name) ABBOTT_AL39 Yeiser_Gawronski
- **One Visit/Site – Split Studies** – This will require 2 expense reports (one per study) using same receipt with notes indicating split cost.

Creating a Trip:

- 1) Go to **“Create Reimbursement”** tab in the upper right-hand corner under **“Home”** and follow the prompt to add a receipt.

Create reimbursement



Create reimbursement

Have multiple receipts? Drag them all in or click to upload

or

New mileage No receipt

- 2) Select **“Create new Trip”** under the Trip field.

← Expenses



Draft Reimbursement

Choose person*
Katie Shepard

Merchant (required)

Amount (required) Currency*
USD

Transaction date (required)

Memo (required)

Trip

test
Apr 17 – 19, 2025 · Boston, Chicago

Create new trip +

3) Fill out the required fields on the new screen and then select **Create New Trip**.

New trip

Trip name (optional)

Start location (required)

Select the starting location of the trip

Destination (required)

Select the last destination of the trip

Departure date (required) Return date (required)

Description (optional)

Eg. "Traveling to NYC for client meeting"

Cancel Create new trip

4) Assign the Trip to all applicable reimbursements by selecting the trip name from the drop down. You now can fill out the remainder of the required fields on the expense.

\$0.00 USD at —

Out of pocket · [Katie Shepard](#)

Choose person*
Katie Shepard

Merchant (required)

Amount (required) Currency*
USD

Transaction date (required)

Memo (required)

Trip
test

Who did you pay for?

1.3 Ramp Coding Fields

Expenses within Ramp will need to be coded by segmentation.

Billable expenses will require basic information in the memo field of the transaction (i.e., lunch, taxi to airport, hotel, etc.).

Ramp Coding Guidelines

Billable = **Yes**

NS Customer Name = name of client from dropdown

Project Code = **Ramp**

Include attachment for Invoice = **Yes** if the receipt is required on an invoice

NS Category = **Pass Through Billing**

Ramp Item Code = **PT_Travel**

NS Classification = the only selection from dropdown

NS Service = the only selection from dropdown

NS Department = select the correct choice from the dropdown

1.4 Receipts

Receipts are required for all expenses incurred as stated within your applicable policy. The user can also upload the receipt directly to the Ramp dashboard.

[Auto Generated Receipts](#)

1.5 VAT Split Expenses ***Applicable only to International Consultants***

A **value-added tax** is a consumption tax that is levied on the value added at each stage of a product's production and distribution. This will only be applicable to all international users who will need to split VAT based on the calculation shown in the receipt.

When you are submitting expenses that include VAT, you will need to use Ramp's "Split Transaction" functionality to ensure we are calling out the VAT amount in a separate line-item. Here are some details on how to Split Transactions:

1. "Project Code" field should be used to reflect the Project Code that this transaction is billable to. This will most likely be the "Ramp" selection. Once this field is tagged with the appropriate Project Code, then the "Billable" field will be enabled so you can mark it as Yes or No.
2. When splitting an expense, the user should update the memo field in the split to add 'VAT'. For the VAT portion, you will select for the NS Category, the country that is applicable to you (UK – VAT on Purchases, Spain – VAT on Purchases, etc.)

Transaction Splitting

Quickly split transactions

If your Finance Team has turned this feature on, Ramp allows you to split expenses for any of your transactions.

To split a transaction into multiple expenses:

- Login → Click on Transaction → Click "Split Expense"
- Enter all of the relevant Accounting Information for the transaction split, ensuring the split \$ Amounts add up to the Original \$ Amount.
- Click "Add Another" to add additional splits
- Click "Save Changes" to submit

NetSuite Category	NetSuite Department	NetSuite C	Amount (AUD)
512110 - Pass Through Billing	Clinical Monitoring	Advance	A\$13.58 99.56%
116470 - Australia - GST on Purc...	Clinical Monitoring	Advance	A\$0.06 0.44%

Users should always use their home country when coding the VAT split. For example, if the user lives in France, but he is traveling to Italy and using his Ramp card in Italy for business-related expenses, all of those expenses should be coded to France VAT, not Italy VAT.

2 Reimbursements

Consultants may need to be reimbursed for Company expenses incurred on their personal cards. Most commonly, reimbursements include cash purchases and business purchases charged on a personal card. Any necessary, reasonable, and actually incurred expense that a consultant personally pays for as part of authorized Company business may be submitted for reimbursement.

Reimbursements should be submitted through the Ramp dashboard – My Ramp / Reimbursement / New Reimbursement. Reimbursements should not be sent through email.

Please include as part of the submission:

- Date of the transaction
- Merchant name
- Amount spent to be reimbursed
- Detailed description of the transaction

When you are setting up your Ramp account, you will be prompted to add your banking information, please ensure that you **do not** enter your banking information. You will be paid manually outside of the Ramp platform.

2.2 Mileage Reimbursements

An automobile personally owned by a consultant and authorized for business use will be compensated when driven for such purpose and will be reimbursed a fixed amount. Mileage should be fully documented: date, starting location, ending location, the business purpose, and the number of business miles.

Mileage Guidelines:

A map should be entered as a receipt attachment for any mileage category.

Configuration

If you use your own vehicle for business travel in a country that requires personal vehicle informant, you will enter this on your profile settings as ***your place of residence***.

Specific mileage reimbursements rates are only supported for the countries: United States, Canada, United Kingdom, Spain, Germany, France, Ireland, and Poland. If you need to submit a mileage reimbursement for a different country, please use the regular reimbursement with the appropriate amount.

Please ensure that your mileage reimbursement is in your correct country's currency and has the correct unit of measurement.

Naming Convention for Manual Mileage Reimbursement Requests

When submitting a manual mileage reimbursement, please complete the memo field with the following naming convention:

Template	Example
Start Location to End Location One Way/Roundtrip Kilometer x mileage rate = reimbursement	Advanced Avenue to Clinical Street Roundtrip 300km x 0.30 EUR = 90 EUR

Submit a Mileage Reimbursement

1. **Submit via the mobile app:** Download the mobile apps (iOS, Android) to submit receipts easily on the go. Save photos as draft receipts right from the app.

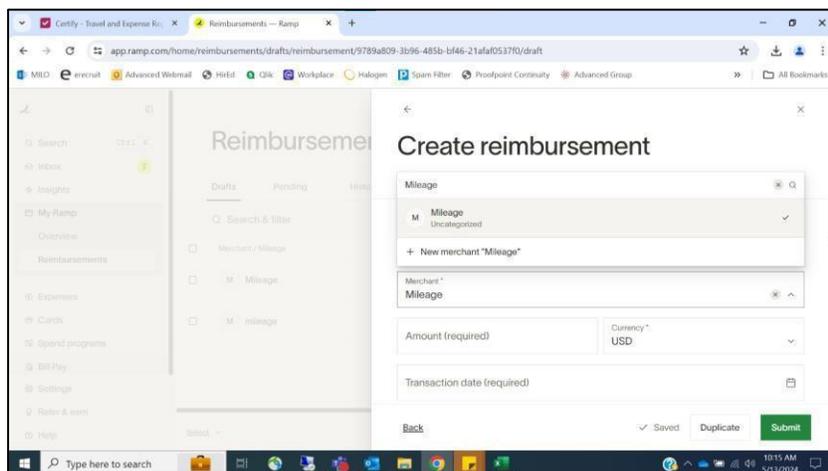
2. **New Reimbursement on web or mobile browser:** Under "My Ramp" > "Reimbursements", you may click on "New Reimbursement", drag and drop receipts or upload from your computer. You can select the "Mileage" Reimbursement tab. You will then have to complete the memo field as shown above, and any other policy requirements. Please ensure that your department coding is accurate.

3. Once your expense is complete, please submit for all required approvals.

4. If you must submit a regular reimbursement for mileage, you will follow all previous instructions and requirements. You will select the "Manual" tab as the expense reimbursement type. The merchant will need to be added as "mileage" in the search bar. Please ensure that you attach a **Google Maps** of the mileage as a receipt to the expense.

The screenshot shows a mobile application interface for creating a reimbursement. At the top, there is a back arrow and the title "Create reimbursement". Below the title are three tabs: "Upload", "Mileage" (which is selected and underlined), and "Manual". The form contains the following fields:

- A dropdown menu labeled "Choose person *" with "Katie Shepard" selected.
- A "Start location" field with a location pin icon on the left.
- A "Destination" field with a location pin icon on the left.
- A "Distance *" field with a vertical bar on the left.
- A "Unit" dropdown menu with "Miles" selected.
- An "Amount" field showing "\$0.00 USD" with a right-pointing arrow.



Round Trip Instructions:

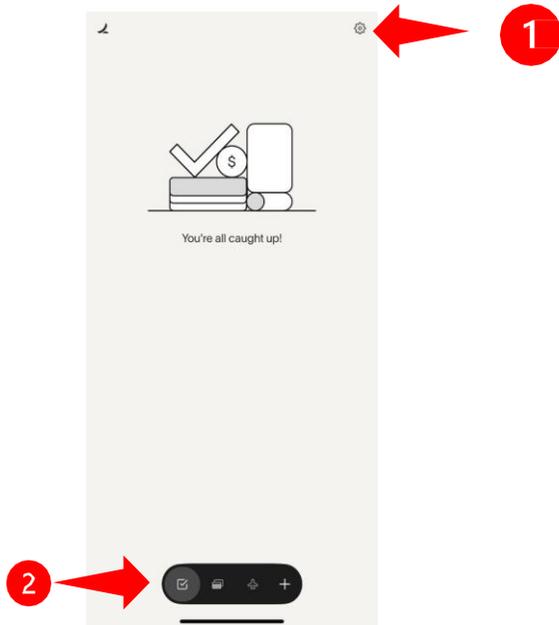
1. Enter the **Starting Location**.
2. Click the **+** button between **(A) Starting location** and **(B) Destination** to add a stop.
3. Enter your destination in the **Stop** field.
4. Enter your trip's ending location (or the starting location for a round trip) as the **Destination**.
5. After the locations are entered, a map should generate and automatically enter the mileage in the **Distance** field and the reimbursement total in the **Amount** field.

3. Ramp Mobile App Usage

3.1 Download the Ramp App

You may download the iOS app from the App Store in any country [here](#) and the Android app from the Google Play Store in any country [here](#).

3.2 Navigating from the Landing Page



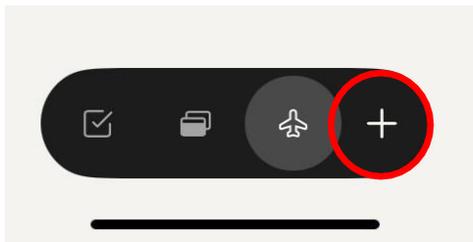
When opening the Ramp Mobile App, users will see their individual landing page. On the landing page users will see outstanding action related to their Ramp account, including incomplete Ramp card transactions or approval requests for managers.

- (1) By clicking on the Settings icon, the user will have access to:
 - a. Edit the user profile
 - b. Open notifications preferences
 - c. Change the app theme
 - d. Contact the Ramp support
 - e. Log out from the Ramp App

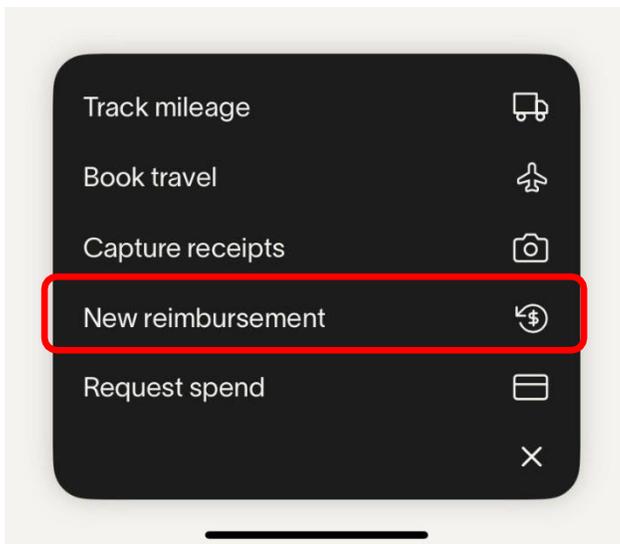
- (2) The navigation bar will allow the user to move between:
- a. Ramp Action Tab (landing page)
 - b. Ramp Card Information and Recent Activities
 - c. Travel Page
 - d. Additional Items
 - i. Track mileage
 - ii. Book travel
 - iii. Capture receipts
 - iv. New reimbursement

3.3 Requesting a Reimbursement

When requesting a reimbursement (out of pocket payment) via Ramp, please navigate to the (1) Navigation Bar at the bottom of the landing page and click on the 'plus' icon.



By clicking on the 'plus' icon, the additional items pop-up page will open. From here, please select "New reimbursement" and enter your information



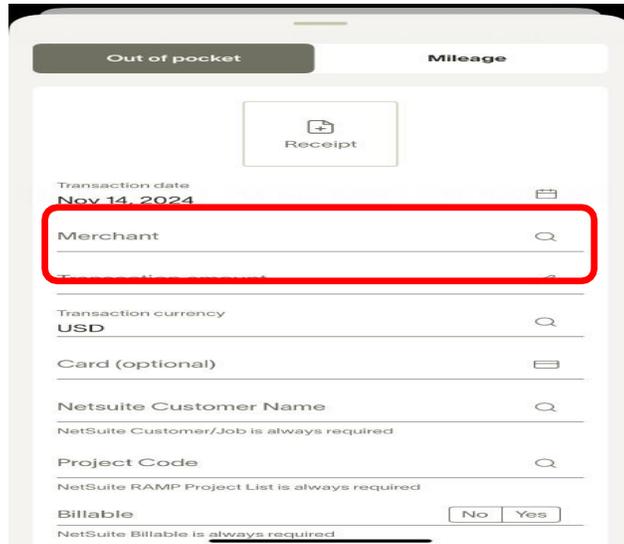
The reimbursement form will open on a new page. By clicking on the receipt button (1), the user has the option to either open the camera, access the photo library, browse your files, or access

saved receipts. Please then enter the applicable information, e.g. transaction date, merchant, customer name, project code and upload your receipt by completing the required reimbursement fields (2). At the end of the form, you will have the option to immediately submit your reimbursement to your manager for approval, discard the form or save for later.

The image shows a mobile application interface for submitting a reimbursement request. At the top, there are two tabs: "Out of pocket" (selected) and "Mileage". Below the tabs is a "Receipt" field with a document icon and a red arrow labeled "1" pointing to it. The form contains several input fields: "Transaction date" (with a calendar icon and the value "Nov 14, 2024"), "Merchant" (with a search icon), "Transaction amount" (with an edit icon), "Transaction currency" (with a search icon and the value "USD"), "Card (optional)" (with a card icon), "Netsuite Customer Name" (with a search icon and a note "NetSuite Customer/Job is always required"), "Project Code" (with a search icon and a note "NetSuite RAMP Project List is always required"), and "Billable" (with "No" and "Yes" radio buttons and a note "NetSuite Billable is always required"). A red arrow labeled "2" points to the "Transaction amount" field.

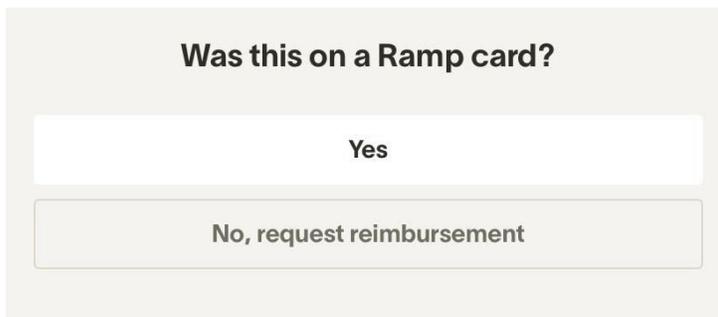
3.3.1 Capture receipts

An optional way to start a reimbursement request is to use the 'Capture receipt' button in the Ramp mobile app.



The screenshot shows the 'Out of pocket' form in the Ramp mobile app. At the top, there are two tabs: 'Out of pocket' (selected) and 'Mileage'. Below the tabs is a 'Receipt' button with a camera icon. The form contains several fields: 'Transaction date' (Nov 14, 2024), 'Merchant' (highlighted with a red box), 'Transaction currency' (USD), 'Card (optional)', 'Netsuite Customer Name', 'Project Code', and 'Billable' (with 'No' and 'Yes' options). A note at the bottom states 'NetSuite Billable is always required'.

When using this option, the camera roll will open on the user's smartphone to take a picture of the available receipt. Next, the user will be asked to either start a new reimbursement request, or to assign the selected picture to an existing Ramp card transaction in the user's queue.

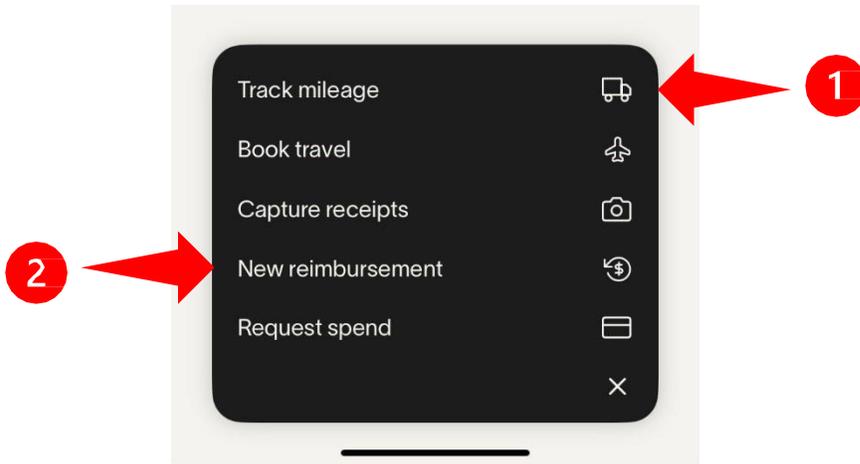


The dialog box has a title 'Was this on a Ramp card?' and two buttons: 'Yes' and 'No, request reimbursement'.

When selecting the option 'No, request reimbursement' Ramp will read the uploaded receipt picture and complete as many fields on the reimbursement form as possible. The user must complete the remaining fields and submit the reimbursement for the manager's approval.

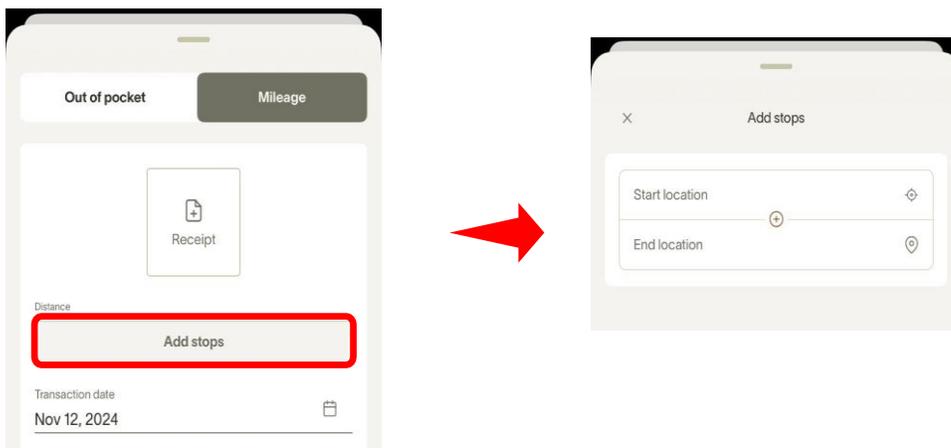
3.4 Requesting Mileage Reimbursement

To request a mileage reimbursement the user has two options within the mobile application. Via navigation from the Ramp mobile app landing page to the additional items, the user will see the option to track mileage (1) or request a new reimbursement (2).



The 'Track mileage' option will allow the user to track mileage automatically when driving. The user must manually start and end the tracking when reaching the destination. The mileage tracking is still in a pilot phase and is not recommended for use.

The preferred method for AG/AC employees is to input mileage using the typical new reimbursement expense flow. By clicking on the 'New reimbursement', the user has the option to select between 'Out of pocket' and 'Mileage'. Selecting 'Mileage' will allow the user to enter the travelled distance. The user can add as many stops as needed.



The mileage tool will calculate the reimbursable amount, based on the countries approved statutory rules. To complete the requirements for the manager's review, the user must complete the applicable fields on the mileage form and hit the submit button.

Reminder: Specific mileage reimbursement rates are only supported for: United States, Canada, United Kingdom, Spain, Germany, France, Ireland and Poland. If you need to submit a mileage reimbursement for a different country, please use the normal reimbursement with the appropriate amount and Google Maps attachment.

Ramp Training

1.1 Training Resources

1.1.1 Training Links

Below are additional Ramp Training Resources. Navigate to the corresponding hyperlinks to learn more.

- <https://ramp.com/training-resources> *scroll to the bottom under employee resources for additional videos*
- Ramp Mobile App - Video walkthroughs for the [IOS App](#) (download [here](#)) and the [Android App](#) (download [here](#))

Ramp Support

1.1 Ramp Support Contacts

1.1.1 Ramp Support Information

1. Please reach out to the Operations Team for any support questions or assistance: consultants@advancedclinical.com.