

Travel and Expense Module



PRODUCTION DegreeWorks

[JSU PROD Advising](#)

[JSU PROD Admin](#)

[JSU PROD Scribe](#)

[JSU PROD Transfer Equivalency Self-Service](#)

PRODUCTION Time and Effort/Travel and Expense

[JSU PROD Time and Effort](#)

[JSU PROD Travel and Expense](#)

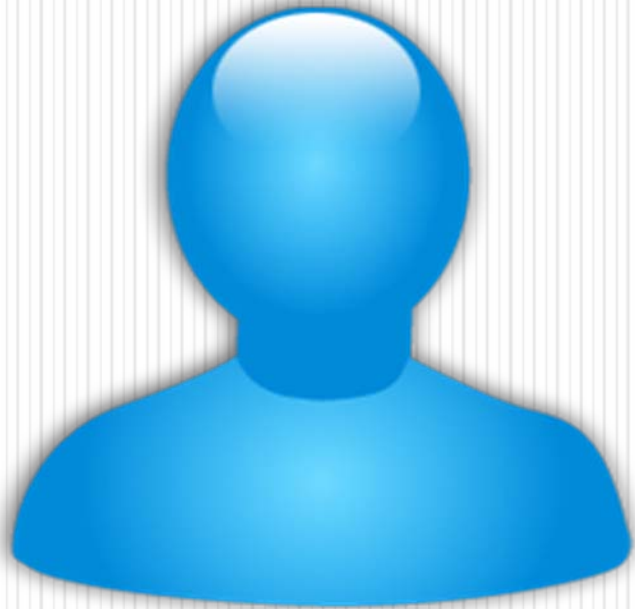
PRODUCTION Banner Workflow

[JSU PROD Banner Workflow](#)

- WWW.JSUMS.EDU/BANNER
 - Click JSU PROD Travel and Expense
 - User Name: Your J#
 - Password: Pin # for JSU PAWS
-

Profile

Travel and Expense



Creating a Profile

Delegate Expense Manager Profile Sign Out

Profile Actions: New Refresh Open Save Copy Delete More Actions Close

Profile for Barry Bickwell

Address or Direct Deposit [Edit]

Business: PO Box 35
Philadelphia, PA 19111
Pay Source: Check to Business

E-Mail [Edit]

BUSI: tred2@m039079.sungardhe.com

Approver [Edit]

ID: TRED5 Name: Ester Edwards

Workflow Login ID [Edit]

Select Edit icon, if available, to add Workflow Login ID.

Funding Default [Edit]

	Chart	Index	Fund	Organization	Program	Activity	Location
100%	B		1110	11006	10		

Open Items

EDIT

SUNGARD HIGHER EDUCATION Travel and Expense Management (Release 8.5)

Select Address

Type	Address	Pay Source
Business	SunGard Higher Education 3 Country View Road Malvern, PA 19355	Check to Business
Permanent	My Home Away from Home SunGard Higher Education 3 Country View Road Malvern, PA 19355	Direct Deposit to Bank of America-PA Account 0002

Cancel Select

Click the **Profile** tab.

2. Click the **Edit** icon for the item you want to change.
3. Click any item in the list to select that item.
4. Click the **Select** button.

Profile

Assign Delegate

Profile Actions New Refresh Open Save Copy Delete More Actions Close

Profile for Barry Bickwell

EDIT

Address or Direct Deposit

Business: PO Box 35
Philadelphia, PA 19111
Pay Source: Check to Business

E-Mail

BUSI: tred2@m039079.sungardhe.com

Approver

ID: TRED5 Name: Ester Edwards

Workflow Login ID

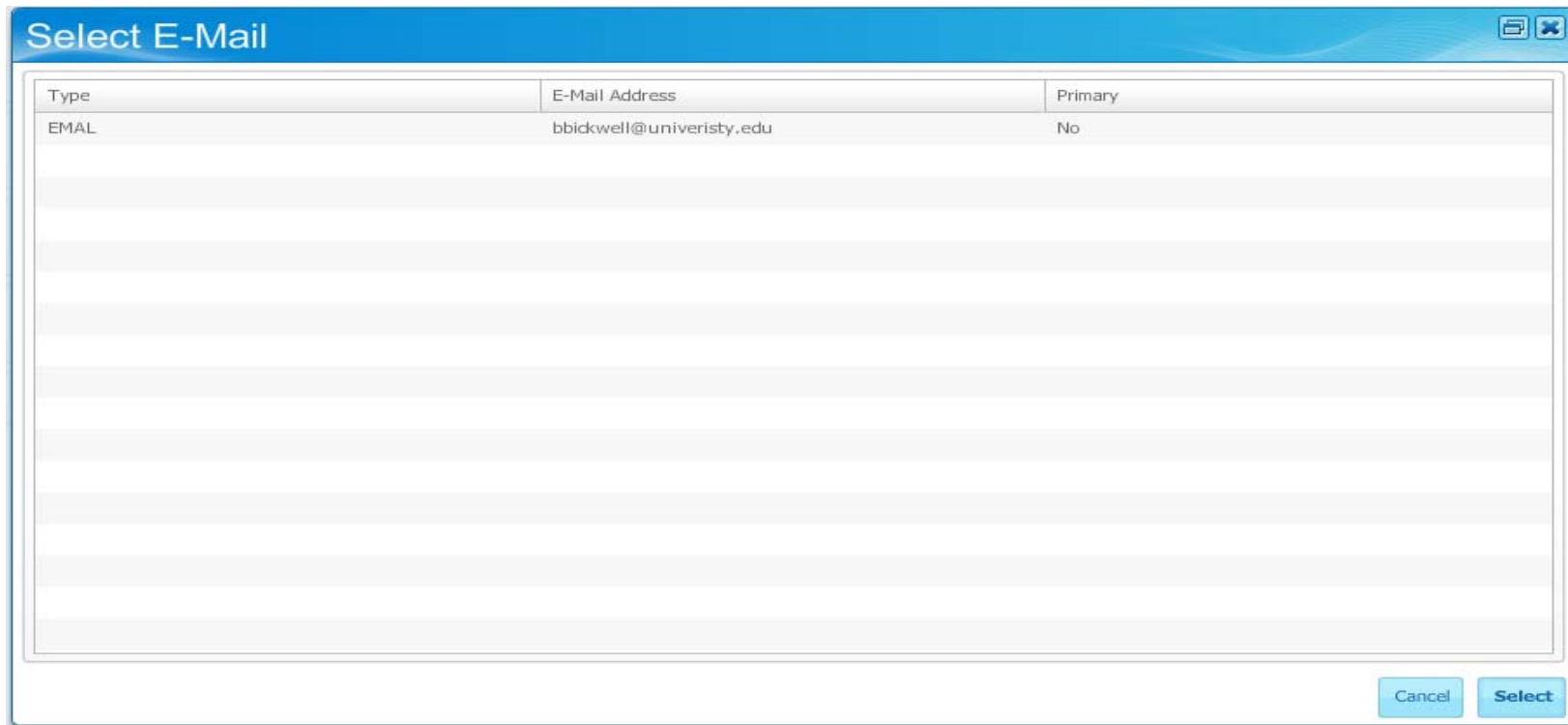
Select Edit icon, if available, to add Workflow Login ID.

Funding Default

	Chart	Index	Fund	Organization	Program	Activity	Location
100%	B		1110	11006	10		

Open Items

--



- Click the **Profile** tab.
- Click the **Edit** () icon for the E-Mail
- Click any item in the list to select that item.
- Click the **Select** button.

Profile

Assign Delegate

Profile Actions New Refresh Open Save Copy Delete More Actions Close

Profile for Barry Bickwell

Address or Direct Deposit

Business: PO Box 35
Philadelphia, PA 19111
Pay Source: Check to Business

E-Mail

BUSI: tred2@m039079.sungardhe.com

Approver

ID: TRED5 Name: Ester Edwards

Workflow Login ID

Select Edit icon, if available, to add Workflow Login ID.

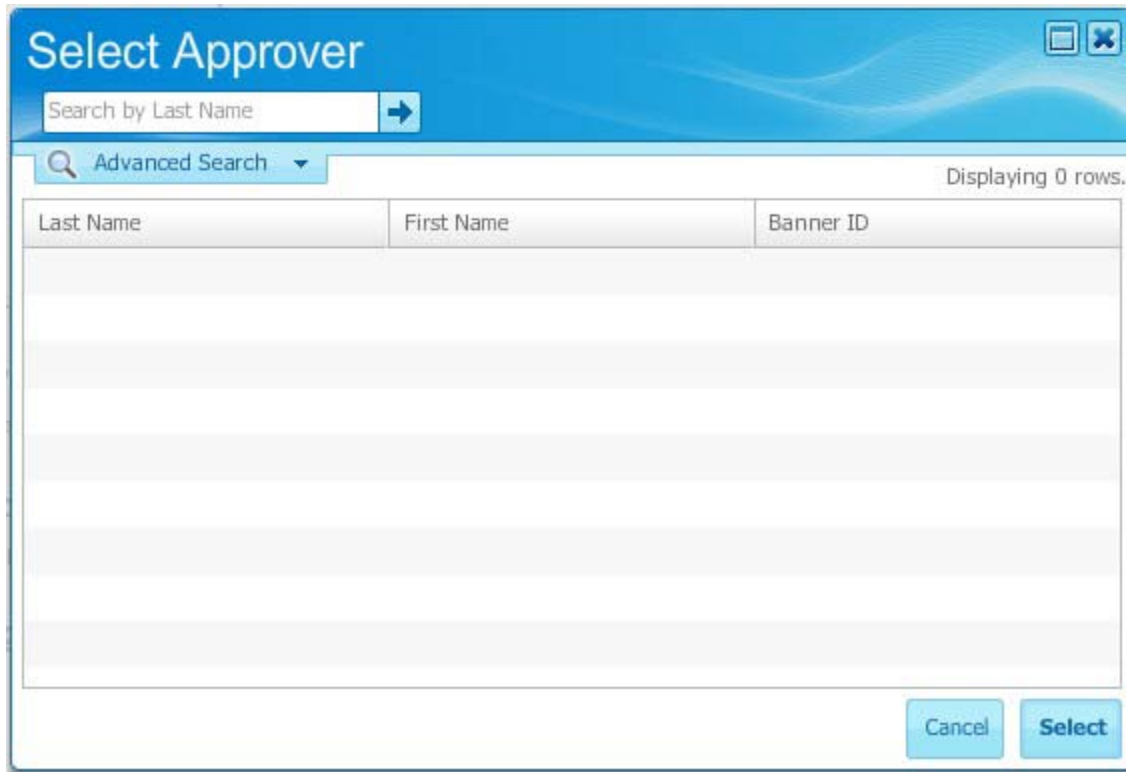
Funding Default

	Chart	Index	Fund	Organization	Program	Activity	Location
100%	B		1110	11006	10		

EDIT



Open Items



1. Click the **Profile** tab.
2. Click the **Edit ()** icon for the **Approver** item.
3. Enter a name or partial name in the **Search by Last Name** field.

****Note: If you did not know how to spell the name, you could enter the partial name followed by a percent sign (%). The percent sign (%) is Wildcard character.

4. Click the arrow button to start the search.
5. Click any item in the results list to select that item
6. Click the **Select** button.

Select Approver

Search by Last Name →

Select Attribute ▼

- Banner ID
- First Name
- Last Name

Close Clear Go

Advanced Search ▲ Displaying 0 rows.

Last Name	First Name	Banner ID
-----------	------------	-----------

Cancel Select

- Click on the **Advanced Search** tab to expand the window.
- Click on the **Select Attribute** field.
- Select an attribute from the list. (Banner ID = J#)
- Enter the information.
- Click the **Go** button.
- Highlight the approver's name
- Click Select

Profile

Assign Delegate

Profile Actions New Refresh Open Save Copy Delete More Actions Close

Profile for Barry Bickwell

Address or Direct Deposit

Business: PO Box 35
Philadelphia, PA 19111
Pay Source: Check to Business

E-Mail

BUSI: tred2@m039079.sungardhe.com

Approver

ID: TRED5 Name: Ester Edwards

Workflow Login ID

Select Edit icon, if available, to add Workflow Login ID.

Funding Default

	Chart	Index	Fund	Organization	Program	Activity	Location
100%	B		1110	11006	10		

EDIT



Open Items



Dialog box titled "Edit Workflow Login ID" with a text input field labeled "ID *" and "Cancel" and "Save" buttons.

- Click the **Profile** tab.
- Click the **Edit** () icon for the Workflow Login ID item.
(Workflow Login ID is your J00000000)
- Enter the Workflow ID in the **ID** field. This ID must be set up in Workflow by the Workflow Administrator. You must also be assigned the Workflow Approver role. This is not searchable or validated here but must be valid.
- Click the **Save** button.

NOTE: You will only need to add your Workflow ID to your profile if you will be approving travel authorizations or travel reimbursements.

Profile

Assign Delegate

Profile Actions: New Refresh Open Save Copy Delete More Actions Close

Profile for Barry Bickwell

Address or Direct Deposit

Business: PO Box 35
Philadelphia, PA 19111
Pay Source: Check to Business

E-Mail

BUSI: tred2@m039079.sungardhe.com

Approver

ID: TRED5 Name: Ester Edwards

Workflow Login ID

Select Edit icon, if available, to add Workflow Login ID.

Funding Default

	Chart	Index	Fund	Organization	Program	Activity	Location
100%	B		1110	11006	10		

EDIT



Open Items

Funding Default

Update Selected Funding

Percent:

Chart: *** Index: *** Fund: *** Organization: ***

Account: *** Program: *** Activity: *** Location: ***

Project: ***

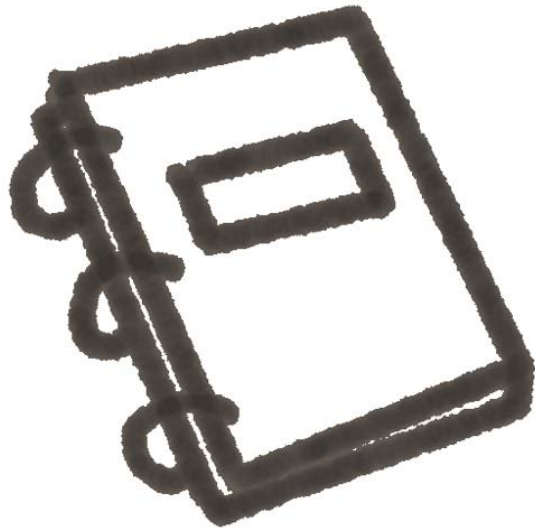
You can only edit the Percent. To edit the Funding, please delete the record and re-create.

Chart	Index	Fund	Organization	Program	Activity	Location	Project	Percent	
J		100000	402000	60				100%	<input type="button" value="X"/>

1. Specify the percentage of the funding to be added in the **Percent** field. The total percentages should add up to 100%.
2. Chart is always J
3. Fill in additional fields (such as Index or Fund, Organization, and Program). Note that the Account field is grayed out because it will be filled in by the Expense Type during processing.
4. Click the **Add** button to add the funding to your selections.
5. You may now add additional funding to your selections by repeating steps 1-4 as necessary.
6. If you wish to remove a funding from your selections, click the **Delete** icon in its row.
7. When you are satisfied with your selections, click **Save** to save them as the default funding or **Cancel** to exit without saving.

Authorization report (TA)

Travel and Expense



Creating Authorization Report

The screenshot displays the Expense Manager application interface. At the top, there is a navigation bar with tabs for Delegate, Expense Manager, Profile, Delegate Control, Advance Control, Administration, Per Diem Administrator, and Profile Administrator. A Sign Out button and a Help icon are also present. Below the navigation bar, there is a toolbar with icons for New, Refresh, Open, Save, Copy, Delete, and More Actions. The main content area is titled "Authorization Report List for Keilani Vanish" and includes a search box for "Search by Report Name" and an "Advanced Search" dropdown. Below the search area is a table with the following data:

Report Name	Report ID	Report Date	Status	Status Date	Reimbursable	Non-Reimbursable	Report Total
Consultant62614	TA000007	Jun 26, 2014	Approved	Jun 26, 2014	350.00	0.00	350.00
Milage62614	TA000006	Jun 26, 2014	Approved	Jun 26, 2014	16.80	0.00	16.80
MBUG	TA000005	Jun 26, 2014	Approved	Jun 26, 2014	150.00	0.00	150.00
Elucian Live 2014	TA000004	Apr 28, 2014	Approved	Jun 26, 2014	30.00	1,478.60	1,508.60

Displaying 4 rows.

1. Click on **Expense Manager**
2. Click **Authorization Report**
3. Click **New**

Create New Report

General Information

Report Name: *

Purpose: *

Description:

Report Type: *

Report Date: *

Affiliation: *

Relocation

Funding Default

Chart	Index	Fund	Organization	Program	Activity	Location
100%	B	1110	11006	10		

1. Enter a unique name in the **Report Name** field.

Note: You may want to include a date in the report name to distinguish this report from another if you make multiple trips to the same city or conference.

2. Select a business purpose, such as *Conference*, in the **Purpose** field.

3. Enter a description of the authorization report in the **Description** field. (OPTIONAL)

4. Select a report type (such as *travel*) as the report type in the **Report Type** field.

5. Today's date will default in the **Report Date** field.

6. Select an affiliation in the **Affiliation** field.

7. Notice that the Funding Default is populated from your **Profile** tab entry, if one exists.

If you wish to change this funding, click on the edit icon, make changes, and click save

8. **Save and Continue** in the next step.

Itinerary

Add Itinerary

FROM:

Date: * Sep 09, 2017 at 12:00 AM

[Search Location](#) OR Enter Zip/Postal Code:

City: * Jackson

State/Province: * MS (Mississippi)

Nation: 157 (United States of Amer)

TO:

Date: * Sep 12, 2017 at 11:59 PM

[Search Location](#) OR Enter Zip/Postal Code:

City: * Natchez

State/Province: * MS (Mississippi)

Nation: 157 (United States of Amer)

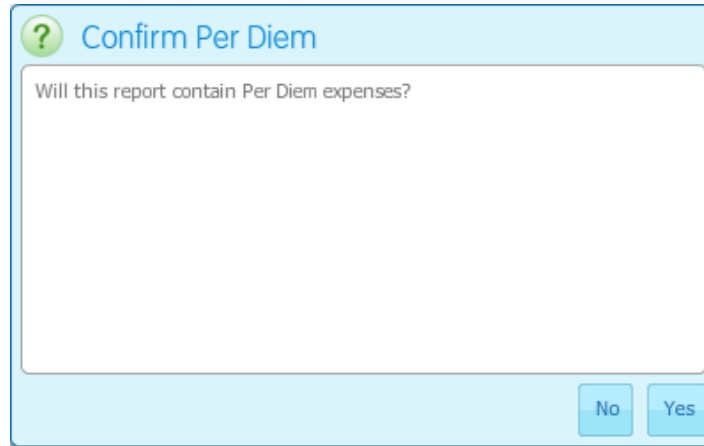
Clear Add

From	To

Cancel Save and Continue

1. Click the **Calendar** icon in the **From: Date** field to select a starting date.
2. Click on **Select Location**. Enter the proper city name. Use the **Search Location** if that helps.
3. Click the **Calendar** icon in the **To: Date** field to select an arrival date.
4. Click the **Time** field drop-down arrow to select an arrival time in half-hour increments.
5. Click on **Select Location**. Enter the destination city name.
6. Click the **Add** button to add the first portion of the trip to the itinerary.
7. Click the **Save and Continue** button to go to the next window.

Repeat steps 1-7 for the addition of other cities that will be visited on the same trip



A light blue dialog box with a title bar containing a green question mark icon and the text "Confirm Per Diem". The main area of the dialog box contains the question "Will this report contain Per Diem expenses?". At the bottom right of the dialog box, there are two buttons: "No" and "Yes".




Click YES/NO if your report will contain Per Diem expenses for meals.

Per Diem Expenses (TA000068 - In Process)

Keilani Vanish (ID: J00128805)

Select a default Payment Method: *

Select

-  Accounts Payable Check
-  Employee Paid
-  University BTA

Date	Location	Exp	from	per diem	Paid By	
Mar 21, 2015	Hattiesburg, MS	Meals Per Diem	<input checked="" type="checkbox"/> Breakfast	<input checked="" type="checkbox"/> Lunch	<input checked="" type="checkbox"/> Dinner	
Mar 22, 2015	Hattiesburg, MS	Meals Per Diem	<input checked="" type="checkbox"/> Breakfast	<input checked="" type="checkbox"/> Lunch	<input checked="" type="checkbox"/> Dinner	
Mar 23, 2015	Hattiesburg, MS	Meals Per Diem	<input checked="" type="checkbox"/> Breakfast	<input checked="" type="checkbox"/> Lunch	<input checked="" type="checkbox"/> Dinner	

Save and Continue

Cancel

- Select Employee Paid
- Deselect any meals that will be provided by the conference

The screenshot displays the 'Expense Manager' application. The main window title is 'New York July (TA000381 - In Process)'. The interface is divided into several sections:

- Left Navigation Panel:** Includes links for 'Authorization Report Li...', 'Authorization Report', 'General Information', 'Itinerary', 'Estimated Expenses' (highlighted), 'Attachments', 'Comments', 'Related Documents', and 'Status History'. There is also an 'Open Items' section at the bottom left.
- Top Bar:** Contains 'Delegator', 'Expense Manager', 'Profile', 'Sign Out', and 'Help'.
- Authorization Report Actions:** A toolbar with buttons for 'New', 'Refresh', 'Open', 'Save', 'Copy', 'Delete', 'More Actions', and 'Close'.
- Add Expenses Form:**
 - Date:** Jul 06, 2014 (with a calendar icon).
 - Type:** Select (dropdown menu).
 - Receipt Amount:** 0 (input field) with a 'USD' dropdown.
 - Paid By:** Select (dropdown menu).
 - Provider:** (input field).
 - Location:** (input field).
 - Description:** (text area) with a 'Funding' button.
 - Buttons:** 'Clear' and 'Save'.
- Expense Table:**

<input type="checkbox"/>	Date	Type	Description	Pay in USD	
<input type="checkbox"/>	Jul 06, 2014	Air Fare		350.00	<input type="button" value="X"/>
<input type="checkbox"/>	Jul 06, 2014	Auto Rental		300.00	<input type="button" value="X"/>
- Summary Panel (Right):**
 - Traveler:** Barry Bickwell (ID: A00014560)
 - Summary By Type:**
 - Total: 650.00 USD**
 - Reimbursable:** Total: 300.00 USD (Auto Rental: 300.00)
 - Non-Reimbursable:** Total: 350.00 USD (Air Fare: 350.00)
- Bottom Buttons:** 'Recalculate Per Diem' and 'View or Submit Report'.

- From an open authorization report, click the Estimated **Expenses** link, if needed.
- Select the date the expense is expected to occur using the **Calendar** icon in the **Date** field.
- Select the expense type in the **Type** field.
- Enter the amount of the expense in the **Receipt Amount** field.
- Note: If you selected a calculated amount type such as *Mileage* in the **Type** field, you will not be able to enter an actual amount in the **Receipt Amount** field.
- Select how the expense will be paid in the **Paid By** field.
- Make sure every field with and * is filled in
- Click the **Save** button to save the expense.

The image shows a software dialog box titled "Continue Expense". It is divided into two main sections: "Recurrence Pattern" and "Range of Recurrence".

Recurrence Pattern:

- Every Day
- Every Weekday (excludes Sat and Sun)
- Recur On:
 - Sun
 - Mon
 - Tue
 - Wed
 - Thu
 - Fri
 - Sat

Range of Recurrence:

- Start: * Nov 09, 2011
- End By: Nov 09, 2011
- End After: [] occurrences

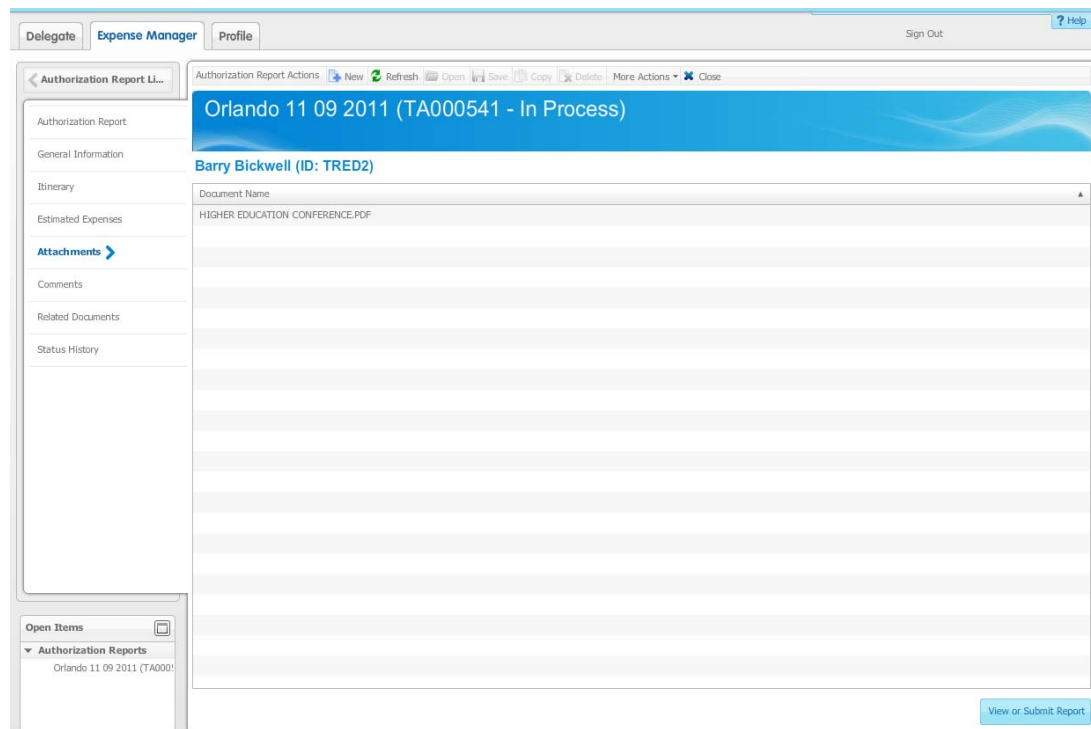
At the bottom right, there are two buttons: "Cancel" and "Copy".

- Note: For repeating expenses, you can click the **Recurring** icon before or after entering the Expense Type and Amount. The resulting window gives you several options for showing how many consecutive days a charge was made.
- **Examples of repeating expenses...hotel charges, car rental fees, per diem, etc**

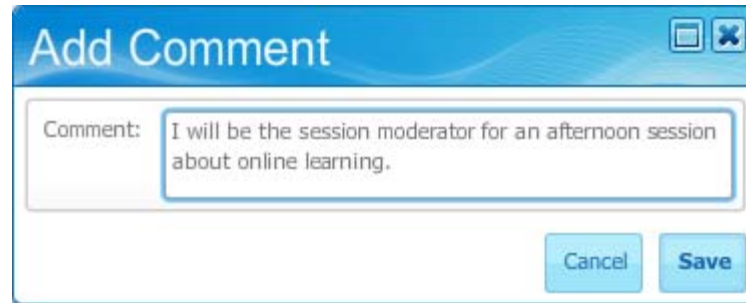
Paid By Options

What will happen with each “Pay By Option”

- Accounts Payable Check – a requisition **MUST** be completed and a PO assigned before an Accounts Payable Check can be issued
- Employee Paid – employee will pay for the expenses and get reimbursed with a completions of a travel reimbursement report
- University BTA – the travel agent will pay for the expenses with the University’s credit card.
- Departmental Transfer – mostly used for JSU Vehicle



- Save the documents on your computer first
- From an open authorization report, click the **Attachments** link.
- Click the **New** icon to add an attachment.
- Click the **Browse** button to navigate to the file you want to attach.
- Click the **Attach** button. The following box will appear if the upload is successful.



Follow these steps to add a comment to an authorization report.

- From an open authorization report, click the **Comment** link.
- Click the **New** icon to add a comment.
- Enter the comment in the **Comment** field.
- Click the **Save** button.

Delegator Expense Manager Profile Sign Out ? Help

Authorization Report Actions New Refresh Open Save Copy Delete More Actions Close

Orlando 11 09 2011 (TA000541 - In Process)

Barry Bickwell (ID: TRED2)

General Information

Report Type: Out-of-State Travel	Report Date: Nov 09, 2011	Pay Amount: 877.84 USD
Purpose: Conference	Relocation: No	Affiliation: Faculty
Description: Online learning conference		

User Activity History

Initiated By: Barry Bickwell (ID:TRED2)
Submitted by:

E-Mail Address

tred2@m039079.sungardhe.com

Itinerary

From: Nov 09, 2011 9:00 AM Malvern, Pennsylvania To: Nov 12, 2011 3:30 PM Orlando, Florida

Attachments

HIGHER EDUCATION CONFERENCE.PDF

Comments


I will be the session moderator for an afternoon session about online learning.

Open Items

- Authorization Reports
- Orlando 11 09 2011 (TA000541)

1 2 3 4

Request Advance **Submit** Print View Related Documents



 Information

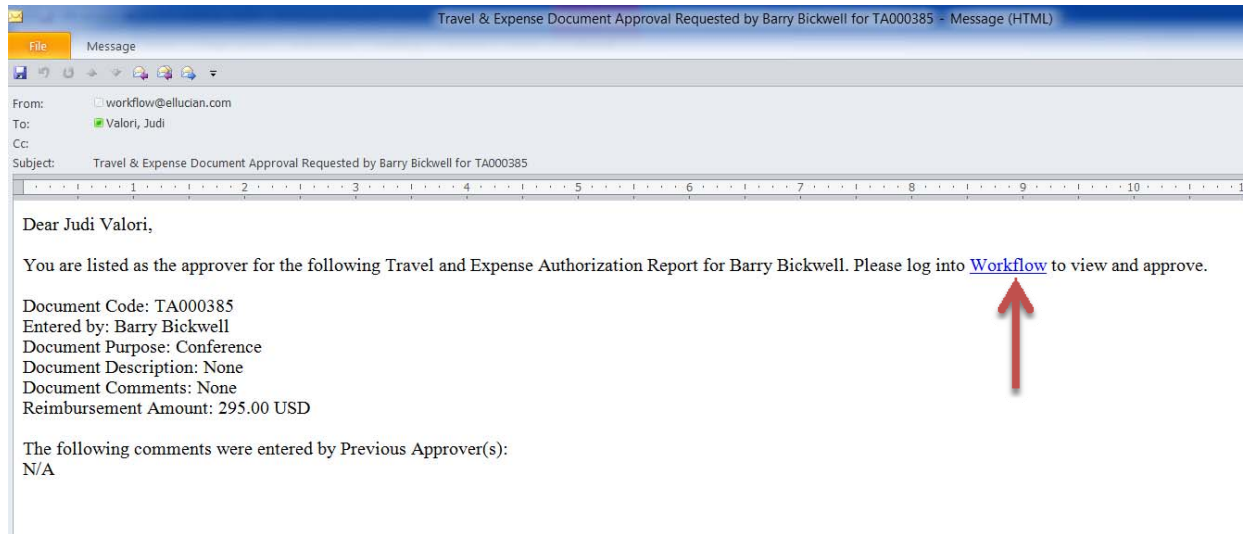
Authorization request TA002552 has been submitted.

OK

Approving travel authorization

Travel and Expense





If you are the Approver for an Authorization or Expense Report, you will receive an email similar to the example above indicating you have something to Approve.

- Click on the Workflow link in the email to take you to the Workflow Login Page.
- Log into Workflow and you will be taken directly to the approval page.

Your approval is being requested for the following Travel & Expense Authorization Report.

Traveler:	Harry Kim
Affiliation:	Administration
Entered by:	Gary Rindone
Relocation:	No
Report Type:	Out of State Travel
Document Code:	TA000320
Report Date:	25-OCT-2013
Document Purpose:	Conference
Document Description:	None
Document Comments:	None
Expense Amount:	1,617.00 USD
Per Diem Amount:	298.00 USD
Reimbursable Amount:	1,915.00 USD
Non-Reimbursable Amount:	564.65 USD
Total Amount:	2,479.65 USD
Budget Available for Reimbursable Expenses:	No
Previous Approver Comments:	N/A

Please select an approval status and enter any appropriate comments.

* Approval Status

- Approve (Final)
- Approve & Add Approver (Enter the approver's Workflow Login ID in the Additional Approver field below.)
- Deny
- Return for Correction

Approver Comments:

Additional Approver:

Additional Approver J# is J00087162

The screenshot displays the 'Expense Manager' application. At the top, there is a 'Sign Out' link. Below the header, a navigation bar includes an 'Authorization Report' link and a toolbar with options like 'New', 'Refresh', 'Open', 'Save', 'Copy', 'Delete', and 'More Actions'. The main content area shows a report titled 'New York 11-15-13 (TA000320 - Submitted)' for 'Harry Kim (ID: A00010905)'. The report is divided into several sections: 'General Information' (Report Type: Out of State Travel, Purpose: Conference, Report Date: Oct 25, 2013, Relocation: No, Pay Amount: 1,915.00 USD, Affiliation: Administration), 'User Activity History' (Initiated By: Gary Rindone (ID:A00010704), Sent to traveler by: Gary Rindone (ID:A00010704), Submitted by: Gary Rindone (ID:A00010704)), 'E-Mail Address' (profilecomp@collegeboard.org), 'Itinerary' (From: Nov 15, 2013 7:00 AM West Chester, To: Nov 22, 2013 2:00 PM New York), 'Attachments', and 'Comments'. A sidebar on the left contains links for 'Preview Report', 'Attachments', 'Status History', and 'Related Documents'. At the bottom of the sidebar is an 'Open Items' section.

- Click on the Travel and Expense Page link on the Workflow page to take you to the report in Travel and Expense Management. You can navigate through this report just like the creator but you cannot modify it except to add attachments and comments. Exit back to your Workflow page to select your approval decision.

Approval Decisions

- Approve (Final) – **NEVER select this option**
- Approve Authorization but Not Advance
- Approve and Add Approver (enter approver's J00087162)
- Deny
- Return for correction (If the report is returned for correction, you must enter a comment to let the traveler know what needs to be changed.)
- Click the **Complete** button to complete your approval process.

Email to the Traveler

Email Indicating Document Has Been Forwarded to Another Approver

Dear Gary,

The following Travel & Expense document has been forwarded for an additional approval.

Document Code: TA000025

Document Purpose: Conference

Document Description: None

Document Comments:

Reimbursement Amount: 631.25

The following comments were entered:

|This is okay by me, how about you?

Regards,

John Miller

Email to the Traveler

Email Indicating Document Had Final Approval

Dear Gary,

The following Travel & Expense document has been approved by Mark Sanders.

Document Code: TA000025

Document Purpose: City Sight

Document Description: None

Document Comments:

Reimbursement Amount: 631.25

The following comments were entered:

Good to Go!

Regards,

Mark Sanders

Travel Advance

Travel and Expense



Advance Rules

- Advance is based on the Employee Paid payment option
- Advance must be requested at least 14 days prior to the schedule trip start date
- Advance will be paid within 7 days prior to the schedule trip start date
- Advance reconciliation must be no more that 14 days after the trip end
- NO advances will be allowed after the trip begin

The screenshot displays the 'Expense Manager' interface. At the top, there are tabs for 'Delegate', 'Expense Manager', and 'Profile', along with a 'Sign Out' link and a 'Help' icon. The main content area is titled 'Orlando 11 09 2011 (TA000541 - In Process)' and is for user 'Barry Bickwell (ID: TRED2)'. The report details include:

- General Information:** Report Type: Out-of-State Travel; Report Date: Nov 09, 2011; Pay Amount: 877.84 USD; Purpose: Conference; Relocation: No; Affiliation: Faculty; Description: Online learning conference.
- User Activity History:** Initiated By: Barry Bickwell (ID:TRED2); Submitted by: (blank).
- E-Mail Address:** tred2@m039079.sungardhe.com
- Itinerary:** From: Nov 09, 2011 9:00 AM Malvern, Pennsylvania; To: Nov 12, 2011 3:30 PM Orlando, Florida
- Attachments:** HIGHER EDUCATION CONFERENCE.PDF
- Comments:** I will be the session moderator for an afternoon session about online learning.

At the bottom right, there are four buttons: 'Request Advance' (highlighted with a red box), 'Submit', 'Print', and 'View Related Documents'. A navigation bar at the bottom center shows page numbers 1, 2, 3, 4.

- Note that if an advance is to accompany the authorization report it must be requested prior to submission of the authorization report. If the **Request Advance** button is clicked on a Submitted report that has not yet been approved, an error message will be displayed.
- An advance request can also be made on an authorization report after the Authorization has been approved and posted.

Advance Request (TA000541 - In Process)

Barry Bickwell (ID: TRED2)


Authorization Information

Report Name: Orlando 11 09 2011 Report Type: Out-of-State Travel
 Report Date: Nov 09, 2011 Trip start date: Nov 09, 2011
 Purpose: Conference Trip end date: Nov 12, 2011
 Description: Online learning conference

Type	Authorization Estimated Amount	Authorization Estimated Amount in USD
Meals - Per Diem (3)	22.00 USD	22.00
Air Fare	410.00 CAN	403.34
Total:		877.84

Advance Request


Advance Rule Name: Malvern
 Description:
 Requested amount: * Payment will be made on or after Nov 10, 2011
 Note: All Advances should be accounted for within 15 days of your trip end date.

Remittance Address 

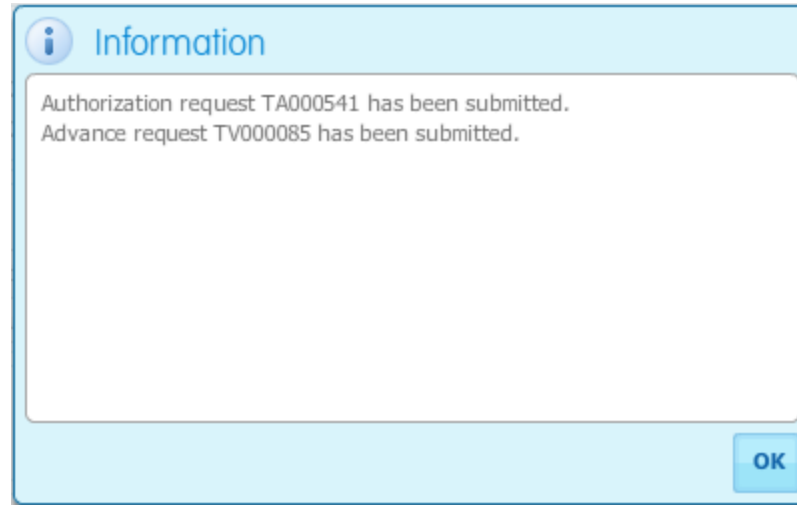
Business: PO Box 35
 Philadelphia, PA 19111

E-Mail Address

tred2@m039079.sungardhe.com

Comments 

- Enter a description of your requested advance in the **Description** field, if desired.
- Enter an amount for your advance request in the **Requested amount** field.
- Add comments, if desired, by clicking the **Edit** icon for the Comments block.
- Click the **Submit** button to submit your authorization report and your advance request. You cannot return to the authorization after entering advance requests.
- **Note: If the authorization is returned for correction, the advance is cancelled and must be requested again after correcting the authorization.**



- If the submission is successful, this message will display.



Expense Report

Travel and Expense



Authorization Report List for Keilani Vanish

Report Name	Report ID	Report Date	Status	Status Date	Reimbursable	Non-Reimbursable	Report Total
Multi-Use	TAD000014	Feb 05, 2015	Approval Denied	Feb 11, 2015	205.00	205.00	500.00
MANHATTAN TRAVEL	TAD000030	Feb 16, 2015	Approved	Feb 16, 2015	151.26	261.64	894.66
Taxi 1/23/15	TAD000002	Jan 23, 2015	Approval Denied	Feb 11, 2015	123.00	618.00	741.00
Taxi 1/23/15 revised	TAD000006	Feb 23, 2015	In Process	Feb 23, 2015	0.00	618.00	618.00
Taxi 2 10 15	TAD000019	Feb 10, 2015	Approval Denied	Feb 11, 2015	123.00	327.00	450.00
Taxi 4/11/15	TAD000021	Feb 11, 2015	Approved	Feb 11, 2015	100.00	0.00	100.00
Taxi per diem	TAD000031	Feb 16, 2015	Approved	Feb 16, 2015	123.00	618.00	741.00

Generate Expense Report

- Go to the Authorization tab and highlight the travel authorization that you want to be reimbursed.
- Click “Generate Expense Report”

Generate Expense Report

Report Name: * NASMAM 21615

Report Date: * Feb 23, 2015

Affiliation: Employee

Cancel Save

- Verify the name on the report
- Verify the report date
- Click save

Delegate Expense Manager Profile Delegate Control Advance Control Administration Per Diem Administrator Profile Administrator Sign Out Help

Expense Report Actions New Refresh Open Save Copy Delete More Actions Close


Expense Report List for Keilani Vanish

Search by Report Name

Advanced Search

Displaying 3 rows.

Report Name	Report ID	Report Date	Status	Status Date	Reimbursable	Non-Reimbursable	Expense Total	Advance	Report Total
NASMAM 21615	TR000006	Feb 23, 2015	In Process	Feb 23, 2015	131.20	763.44	894.64	0.00	894.64
Test 2/11/15	TR000005	Feb 16, 2015	Paid	Feb 16, 2015	85.01	0.00	85.01	0.00	85.01
Test Meals	TR000001	Feb 04, 2015	In Process	Feb 04, 2015	254.10	310.00	564.10	0.00	564.10



- Double click to open
- Totals from the TA transferred over. Verify totals and make corrections if necessary.
- Attach any supporting documentation such as receipts from hotel or transportation

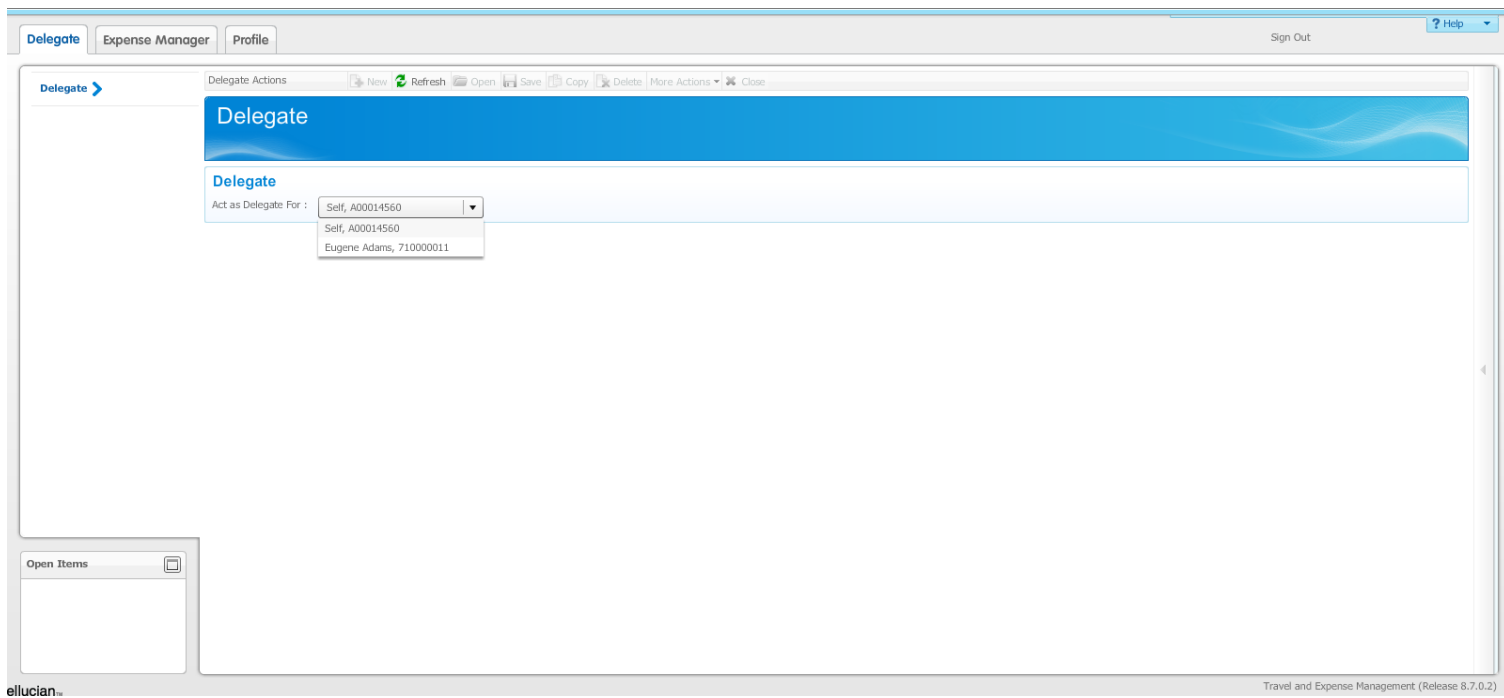
Delegates

Travel and Expense



Acting as a Delegate

- Indicate on the System Access Authorization for Travel and Expenses Management form (under the TEM Delegate Authorization List) include the names and J#'s of the people you will be a delegate for.



- At the “Act as Delegate For” field, select the travelers name
- Proceed with the completing the travel authorization or travel reimbursement as if you were the traveler.

Questions/Concerns/Complaints

- Stephanie Weekly, Travel Coordinator
 - 601-979-0699
 - Stephanie.weekly@jsums.edu
- Kizmet Davis-Esco, Travel Coordinator
 - 601-979-0869
 - kizmet.k.davis-esco@jsums.edu

This has concluded the Travel &
Expense training workshop

Happy Traveling