EX.060.500 – USING THE TRAVEL & EXPENSES CENTER IN THE CORE APPLICATION

Purpose	• To identify what functions Expenses Administrators can accomplish through the Travel and Expense Center. • To define the difference between an employee accessing the T&E Center through self-service, and an Expenses Administrator accessing the T&E Center through the Core Application. • To use the T&E Center in the Core Application.
Description	The Travel and Expense Center in the Core Application provides a way for Expenses Administrators to access virtually the same components that are available in the Employee Self-Service component of the Self-service Portal. The main difference is that when an employee logs into the self-service portal, they can only perform expense actions for themselves or for anyone who has delegated authority. The Travel and Expense Center offers Expense Administrators great flexibility to monitor employee transactions and payments on an institutional level. From the Travel and Expense Center in the Core Application, an Expenses Administrator has a higher security role which allows them to perform multiple functions including create, modify, view, print, re-route workflow, etc., on behalf of any employee.
Security Role	**BOR_EX_TEADMIN_CENTER**
Dependencies/ Constraints	None
Additional Information	None

Procedure

Below are step-by-step instructions on how to use the Travel & Expenses Center in the Core Application.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** link.
3.	Click the **Travel and Expenses** link.
4.	Click the **Travel and Expense Center** link.
5.	Notice that the T&E Center closely resembles the view a traveler sees when he/she logs into the Employee Self-Service section of the Self-Service portal.
6.	From this page, an Expenses Administrator can perform the same actions that a Traveler can perform for themselves in the Self-Service portal. The main difference is that the Expense Administrator is not limited by his/her own User ID; he/she can act on behalf of any employee in the system.
7.	**Decision:** Select from the options listed below. • Do you wish to see how to view a travel authorization from the T&E Center? Go to step **Error! Reference source not found.** on page 2 • Do you wish to see how to print an Expense Report from the T&E Center? Go to step **Error! Reference source not found.** on page 3
8.	Click the **Travel Authorization** link.
9.	Click the **View** link.
10.	If you wish to view a specific travel authorization, you can enter the transaction number in the blank field. Otherwise, you can search for all existing values.
11.	Click the **Search** button.
12.	This page displays all Travel Authorizations for all employees at the institution. You can easily view the Status and Age (creation date) of each transaction from this page.
13.	Click an entry in the **Authorization ID** column to view the details of the travel authorization.
14.	The travel authorization you selected is displayed and can now be reviewed.
15.	Navigate to the bottom of the page.

Step	Action
16.	Click the **Return to Travel and Expense Center** link.
17.	You are transported back to the Travel and Expense Center.
18.	Click the **Expense Report** link.
19.	Click the **Print** link.
20.	If you wish to use an existing Run Control you can enter this value on the **Find an Existing Value** tab. For this exercise, we will add a new Run Control.
21.	Click the **Add a New Value** tab.
22.	Enter "**Print_Exp_Rpt**" in the **Run Control ID** field.
23.	Click the **Add** button.
24.	Click the **Look up Report ID (Alt+5)** button.
25.	A list of all Expense Reports for all employees is displayed.
26.	Click an entry in the **Report Description** column.
27.	Click the **Save** button.
28.	Click the **Run** button.
29.	You can either run the report to the Window or run the report to the Web by specifying the **Type**. For this example, we will run the report to the Window.
30.	Click the **Type** list.
31.	Click the **Window** list item.
32.	Click the **OK** button to run the report.
33.	A new window will open and the Status of **Queued** will most likely appear. You do not need to manually refresh the page.
34.	You may also see the Status of **Processing** before the report is completed.
35.	When the report has successfully been created, it will automatically display in your new window.
36.	You can click the **X** at the top right corner of your browser to close the report window.