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## EX.010.041 - Setting Up Expenses Pagelets

#### Trigger:

#### Concept

This topic demonstrates how to set up Expenses Pagelets. The Expenses Module is comprised of transactions that are in various stages. Expenses provides a tool for executives, managers, and auditors to easily identify and track transactions in progress so that they can gain insight into potential problem areas. This is the Real-Time Analysis functionality.

This tool provides the following types of information and data:

**Expense Reports:** Transactions in Process (TIP) data focuses attention on what needs to be resolved with regards to Expense Reports to ensure that your expenses system runs smoothly.

**Travel Authorizations:** Total Predicted Expenses (TPE) data focuses attention on what needs to be resolved with regards to Travel Authorizations to ensure that your expenses system runs smoothly.

**Expenses Pagelets:** Expenses Pagelets are an optional way for interested employees to see Real-Time Analysis figures on their initial log-in page to the core Application.

The Real-Time Analysis functionality is covered in six separate topics:

1. EX.010.040 – Setting Up Real-Time Analysis Defaults (Admin function that is performed once per institution)

2. EX.010.043 – Setting Up Transactions in Progress methods (Must be performed once by each user who wishes to view Transactions in Progress)

3. EX.010.041 – Setting Up Expenses Pagelets (Must be performed once by each User who wishes to have pagelet information on their “Home” page)

4. EX.030.042 – Running the Update Expenses Pagelet Info Process (should be run at least daily)

5. EX.030.500 – Reviewing Transactions in Progress (Expense Reports) (used to review information as needed)

6. EX.030.501 – Reviewing Total Predicted Expenses (Travel Authorizations) (used to review information as needed)

This topic, Setting Up Expenses Pagelets (EX.030.041), covers how to add Expenses Pagelets to your Home page. Steps 1, 2, and 4 must be completed before the Pagelets will be available.

**Topic Objectives:**

Upon completion of this topic, you will be able to:

- Identify what Expenses pagelets are.

- Identify what information can be displayed through Expenses pagelets.

- Identify what steps must be completed before you can set up Expenses pagelets.

- Set up Expenses pagelets.

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| Assumptions |
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| Dependencies/Constraints |
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#### Additional Information

#### Procedure

For this topic, we need to add all four Travel and Expenses pagelets to our home page. Let’s see how this is done.

| Step | Action |
| --- | --- |
|  | The Expenses Module is comprised of transactions that are in various stages. Expenses provides a Real-Time Analysis tool for executives, managers, and auditors to easily identify and track transactions in progress so that they can gain insight into potential problem areas.  This Real-Time Analysis tool can be used directly in the Core Application (see ***EX.030.500*** and ***EX.030.501***). As a convenient alternative, Expenses Pagelets can be added to your Home Page so that you can review this information easily when you log in to the system. |
|  | Click the **Content** link. |
|  | The **Personalize Content** page is used to add optional pagelets to your Home page, and then specify their layout. |
|  | You can add an optional Welcome Message that will be displayed near the top of the page on your Home page. |
|  | Click the **vertical** scrollbar to navigate to the bottom of the page. |
|  | There are four Travel and Expenses Pagelets which you can add to your Home page.  **Total Predicted Expenses** - Travel authorizations which have been fully approved.  **Expenses not Submitted -** Expense Reports which have been entered in the system, but have not been submitted (EXSTNE)  **Expenses Recorded / not Approved** - Expense Reports that have been submitted, but have not received their final approval for payment (EXRECNA)  **Expenses Approved / not Paid** - Expense Reports that have received their final approval for payment, but have not been paid (EXAPRNP) |
|  | For this exercise, we will add all four Travel and Expenses pagelets. |
|  | Click the **Total Predicted Expenses** checkbox. |
|  | Click the **Expenses not Submitted** checkbox. |
|  | Click the **Expenses Recorded/not Approved** checkbox. |
|  | Click the **Expenses Approved / not Paid** checkbox. |
|  | Click the **Save** button.  This will save your choices and return you to your Home page. |
|  | You can also specify how you would like your Home page to be organized by clicking the **Layout** link. |
|  | Click the **Layout** link. |
|  | The Basic Layout selection allows you to choose to display the pagelets in either two or three columns on the homepage.  A two-column layout results in one narrow column on the left side of your homepage and one wider column to the right.  A three-column layout results in three narrow columns of equal width. If you place a wide pagelet in a narrow column, the column stretches to accommodate the wider pagelet. |
|  | The arrow buttons can be used to position the pagelets. Highlight the desired pagelet, and then click the arrows to move the selected pagelet above a pagelet, below a pagelet, to the next column on the right, or to the next column on the left.  For this exercise, we will keep all Pagelets in the Left Column. |
|  | Click the **Save** button to save your layout changes and return to your Home page. |
|  | Click the **vertical** scrollbar to scroll down. |
|  | Notice that the pagelets you selected from the Content menu are displayed in a graphical view. |
|  | The Update Expenses Pagelet Info process must be run before current data is populated into these pagelets (See ***EX.030.042***).  The last date that this process was run appears in each pagelet so you can determine how current the information is that you are viewing. |
|  | Click the **TIP Inquiry Page** link to view the specifics of this graphical view. |
|  | The **Transactions in Progress - Expenses (Details)** page is displayed. You can update this page to limit your search criteria. |
|  | You can search by the number of days a transaction has been inactive.  All days  < 31 days  31 - 60 days  61 - 90 days  > 90 days |
|  | You can search by Employee. |
|  | You can specify a particular ChartField to search by. |
|  | For this exercise, we will search for ALL expense transactions without entering any limiting criteria. |
|  | Click the **Search** button. |
|  | Click the **vertical** scrollbar to navigate to the bottom of the page. |
|  | The transactions section is populated with the expense reports that satisfy the criteria you selected. |
|  | Click the **Save** button. |
|  | Click the **Home** link at the top of the page to return to your home page and review your other pagelets. |
|  | Congratulations. You have just completed the **Setting Up Expenses Pagelets** topic. Below is a summary of the key concepts of this topic:  - Expenses Pagelets are an optional way for interested employees to see Real-Time Analysis figures on their initial log-in page to the Core Application.  - There are four Expenses pagelets that can be added to your Home page. They include Total Predicted Expenses; Expenses Not Submitted; Expenses Recorded, but not Approved; and Expenses Approved, but not Paid.  - Before setting up Expenses pagelets, the Real-Time Analysis Defaults must be setup, the Transaction in Progress methods must be setup, and the Update Expenses Pagelet Info Process must be run.  **End of Procedure.** |