**Introduction**

Lesson Description:

This lesson is designed to instruct end-users on how to access Travel and Expenses through the Self-Service module. This lesson primarily applies to Travelers and Approvers who only access PSFIN via the Self-Service portal.

Objectives and Tasks:

By the end of this lesson, participants will be able to successfully access the Travel and Expenses module in PSFIN v9.2. The tasks covered in this lesson include:

* PSFIN Self-Service Registration
* Reviewing and Editing User System Profile
* Delegating Entry Authority

Accompanying Materials:

* Accessing Travel and Expenses\_PPT
* Accessing Travel and Expenses\_Job Aids

**Self-Service Registration in PSFIN**

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| Slide 2 | Self-Service Registration Overview   * Applies to new users only * Current Expense users do not need to re-register after the upgrade to PSFIN v9.2 * If new user will access PSFIN via Core system to perform other job duties, they can still self-register   + Local Security Admin must grant them additional access though * When self-registering, users can create their own User Name * In order to self-register, user data must be loaded from HR/Payroll Application (ADP), which is done twice daily |
| Slide 3  Slide 4 | Completing Self-Service Registration   1. Go to <http://fprod-selfservice.gafirst.usg.edu>. 2. Select “**Register For My Account**” 3. Enter the following information and then click the **Next** button:    1. Date of Birth (mm/dd/yyyy)    2. SSN (last four digits)    3. Home Zip Code (5 digits) 4. Select **Next**    1. This pulls up your job row and asks you if you want to create an account for your specified institution 5. Select **Next** 6. Create a **User ID** and **Password** 7. Log out of the system and log back in (using URL in Step 1) with your new User ID and password |

**System Profile**

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| Slide 5 | User Profile   * Much of the information is imported from HR/Payroll Application * Some information can be edited; some information can only be edited by an administrator * Various tabs with information |
| Slide 6 | Employee Data Tab   * Verify information here including Home Address |
| Slide 7 | Organizational Data Tab   * Information here affects where expense transactions are charged * Someone at the institution completes this information to ensure the Department and Chartfields are correct |
| Slide 8 | User Defaults Tab   * User can set up defaults for how to create transactions, expense defaults and expense types: * In Default Creation Method section, user can choose how they wish to normally create an transaction (Time Report not used) * In Expense Defaults section:   + If User generally travels for same purpose every time, he/she can select a default Business Purpose   + User should select/enter his/her default originating location   + If User generally uses the same Payment Type for all expenses, the default can be selected here (“Credit Card” is now available as a payment type   + Billing Type should remain internal |
| Slide 9 | Bank Accounts Tab   * Lists bank account information for how expenses are to be paid * While in HR/Payroll Application (ADP), employees ensure that bank account is selected, which carries information to PSFIN Expenses |
| Slide 10 | Accessing User Profile   1. After logging in, select **Employee Self-Service** 2. Select **Profiles and Preferences** 3. Select **Review/Edit Profile** 4. Review information on **Employee Data** tab 5. Review information on **Organizational Data** tab 6. Set User defaults on **User Defaults** tab (optional) 7. Review information on **Bank Accounts** tab |

**Delegating Entry Authority**

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| Slide 11 | Delegating Entry Authority   * Feature enables user to allow someone else to enter Expense Transactions on his/her behalf * For example, Dean wants her Admin Assistant to be able to enter and review Expense Transactions for her…this functionality makes that possible |
| Slide 12 | Steps for Delegating Entry Authority   1. After logging in, select **Employee Self-Service** 2. Select **Profiles and Preferences** 3. Select **Delegate Entry Authority** 4. Add a row by clicking the **+** button 5. Enter the User ID of the person you are giving authority to enter Expense transactions on your behalf or select the Look Up icon and search for the user. 6. Select the **Save** button. |