

Infinite Visions Enterprise Edition (IVEE)

Employee Expense Reimbursement.

Student Guide - revised for SD308.1.24.20



Expense Reimbursement

To begin, log into iVisions and under Self Service – choose Expense Reimbursement. You will get a screen similar to below.

If you are an administrator and will be approving requisitions, you may be prompted to change your password. Type **NeedNew1** as the current password.

For new password, create one that must be 8 characters with 1 capital letter and 1 number (no special characters can be used)

Note: you will only need this password ONE time to authenticate you into the workflow module.

Employee Expense Requests

View: All Employee Name: [] Apply
Expense #: [] Expense Type: All Clear

Expense #	Date	Activity Description	Total Amount	Status	Has Documents	Item Approval	DAC	Expense Name	Expense #	Check #	Check Date	Expense Total
218	12/20/2019	Travel	\$28.35	Open	Yes	On	Praine Point Elementary School	KIMBERLY A. MANNA				Expense Reimbursement
112	12/13/2019	Travel	\$8.50	In Process	Yes	255428p/Bankovi	Owaga East High School	TRAVEL from OE to DAC and back on 12/11 and 12/12/2019 for School Travel	ROSA L. CRUZ			Expense Reimbursement

Another window will open that looks like this:

Add Request

Expense Request

Expense #: [] Notes: []
Expense Date: 1/6/2020
Employee Name: []
Activity Description: DAC
P-Card P-Card Vendors Pre-Approval

Item	Expense Type	Description	Unit Price	Item Total	Account
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0 records to display

Mode: Add

Close after update? OK Cancel



Add an Expense Reimbursement Request

Employee Expense Reimbursements window

From the Employee Expense Reimbursements grid, click the + Plus **green** button on the tool bar. The Add Reimbursement window displays.

The **Expense #** field is auto populated once an expense detail line is selected.

In the **Expense Date** field, enter the date of the expense.

In the **Employee Name** field, choose *your name or select a name you are given permission to enter*.

From the **DAC (stands for district account center)** dropdown, select School. This field is auto populated if assigned to a single DAC.

From the **Activity Description** dropdown, select *Staff Mileage/or whatever expense you are processing*.

In the **Notes**, type any additional notes. Keep it brief.

Entering Expense Detail

From the **Expense Type** dropdown, choose *Staff Mileage-ED fund/or selected dept (if shown)*.

In the **Description** field, overwrite the account expense type and put the month or range of dates for reimbursement. For example, "mileage from Jan 1-30th."

In the **Unit Price** field, this should auto populate based on the mileage rate. Can't leave blank, so select 1 if it doesn't autofill.

In the **Qty** field, add the number of total miles. This should match your log sheet you will attach for back up.

From the **Account** dropdown, select *the account code defaulted*.

Leave the **Grant Project** field blank. Click **Save**. (Floppy disk icon)

From the Actions menu, select **Manage Documents**. The Manage Reimbursement Documents window displays.

Under Tyler content manager, select the underlined up arrow to import attachment. Choose File and select IMPORT.

In the **Notes** field, enter month and what the expense is for (ex: December mileage).

Then under Tyler content manager next to the + sign, click on the floppy disk icon again to save.

Close the manage Reimbursement Documents window by clicking the "red X" in the right corner.

Mark the **Submit for Approval** checkbox to route the expense reimbursement through the approval process. Then click **OK**.