Infinite Visions Enterprise Edition (IVEE)

Employee Expense Reimbursement.

Student Guide - revised for SD308.1.24.20



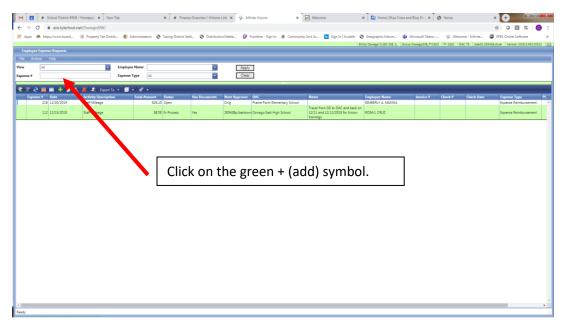
Expense Reimbursement

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

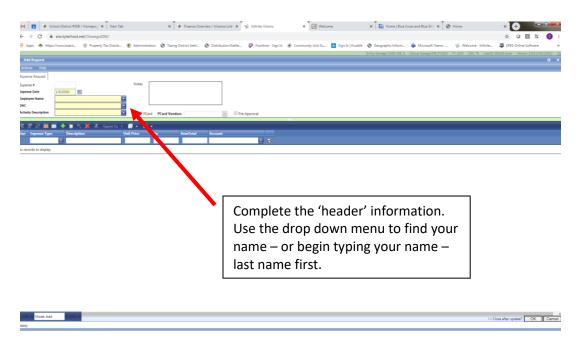
If you are an administrator and will be approving requisitions, you may be prompted to change your password. Type **NeedNew1** as the current password.

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.

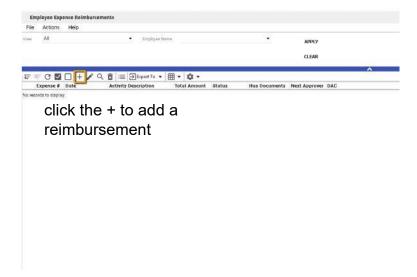


Another window will open that looks like this:





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 matchyour 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 Reimubursement 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.

