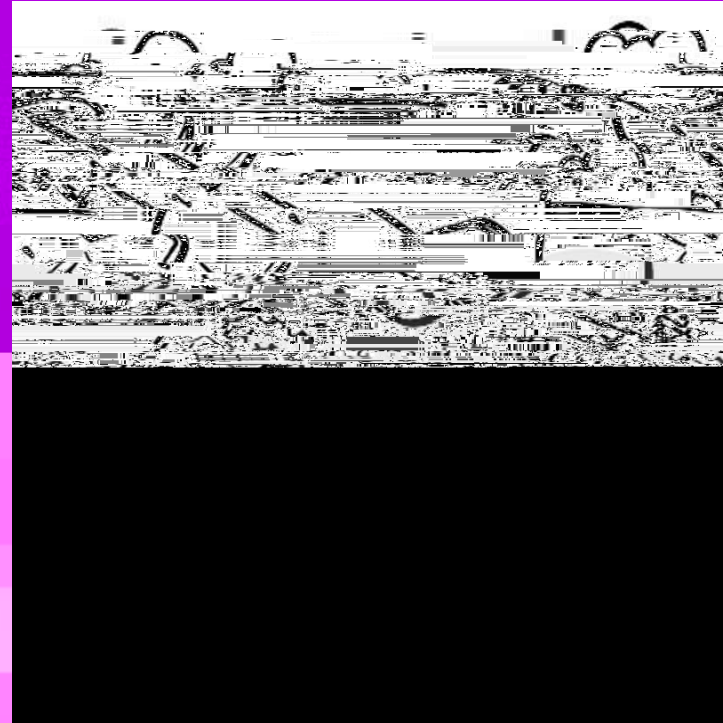


# Travel and Expense (T&E)

Tips & Tricks



# Updating an Employees Default Chart field Values (only the Traveler, HR Supervisor or Fiscal Reviewer can complete this task)

- HR Supervisor or Fiscal Reviewer Navigation Manager Self Service > Employee Profile > View/Update Chart field Values
- Traveler navigation: Employee Self Service > Travel and Expenses > Review/Edit Profile > Organizational Data, under the Default Chart Field Values Tab ensure the box titled "Default

How do I update the chartfield string on  
an ExpenseReport(ER)?

-

What is the difference

# What is the fastest way to enter expense lines into an ER?

- [Add Multiple Expense Lines](#) page 123 T&E Traveler Training Guide
- Select the Quick Fill link to add multiple line items in one step.

- Check to see if the location traveled to “default location” has an expense location number listed in our system
- If not on list, request the location be added by contacting the [Finance Support Center Hotline](#) for your Campus 877 752 3334.
- After entering the location, enter expense type, select currency type by using the magnify glass, eg. EUR (Euro), ZAF (S African Rand). For additional, see page 84 of the T&E Traveler Training Guide
- Enter the expense type line item in the foreign currency (exception to this is per diem meals) and the system will make the automatic conversion to US Dollars.

- Credit card companies charge up to 3% on every foreign currency amount charged to a credit card.
- Total T





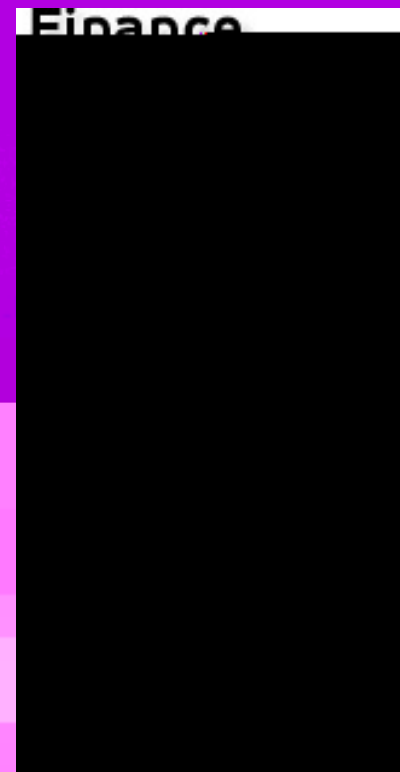




- HR Supervisor Report
  - All HR Supervisors receive an automated email report each month to let them know of direct reports, if any, who had travel

# Where can I direct questions regarding the T&E system?

- The Finance Support Center is available Monday – Friday from 7:30 a.m. to 5:00 p.m. to answer any of your questions by phone or email related to the Finance Function. Their areas of expertise include, but are not limited to Procurement, accounting and budgeting and the related systems of Peoplesoft, Web Applications, and Hyperion. By utilizing the Support Center, you receive the assistance you need and help identify enhancements and training opportunities.



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- [Accounts Payable Shared Services](#)
    - Direct link to what T&E is about, when to use and how it works
  - [Business Policy Manual – Travel](#)
    - Direct link to policies surrounding travel
  - [Finance Support Center](#)
    - Direct link to the Finance Support Center and how to contact them
    - Questions concerning accounting, budgeting and the related systems of PeopleSoft, Web Applications, and Hyperion should be directed here.
  - [Travel & Expense System FAQ's](#)
  - [Travel & Expense System Helpful Links and Documents](#)
  - [Travel & Expense System Training](#)
    - Provides a direct link to training information on T&E