DEMOS SESSION
February 5 & 12, 2020
What to expect at today’s demo session -

**Live system demonstrations** in Ignite

**Q&A opportunity** with the project team

Training will be available in late Spring

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**Today’s Session**

- Expense Reimbursement
- Expense Reporting for P-card/ Travel Card
- Travel/ Spend Authorization
WE WANT TO HEAR FROM YOU

Questions? Feedback? Ideas?

During today’s session...

SPEAK UP

Q&A

SUBMIT

Mentimeter

NOTE & EMAIL LATER

Handouts
Revise processes and policies to streamline travel and expense reimbursement

<table>
<thead>
<tr>
<th>PROCESS</th>
<th>Unify expense management systems</th>
</tr>
</thead>
<tbody>
<tr>
<td>POLICY</td>
<td>Consolidate and simplify policies to reduce confusion</td>
</tr>
<tr>
<td>SUPPORT</td>
<td>Focus on making travel less cumbersome and time consuming</td>
</tr>
</tbody>
</table>

PROCESS IMPROVEMENTS WILL CONTINUE AFTER IGNITE GO-LIVE
CURRENT STATE VS. FUTURE STATE

Travel and Expenses

### Expense Items
- **7** Card Charges
- **10** Cash

### Expense Reports
- **6** Requires Action
- **181** In Progress
- **1** Paid

### Approvals
- **4** Reports $113K

### Cash Advances
- **2** In Progress
- **3** In Approval

### Authorizations
- **16** In Progress
- **57** In Approval
- **10** Approved

### Available Expense Items (7)

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>Amount</th>
<th>Merchant</th>
<th>Location</th>
<th>Description</th>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/04/2019</td>
<td>Advertisements For Person</td>
<td>5.08 USD</td>
<td>Waco Trip</td>
<td>United States</td>
<td>Advertisement for position</td>
<td><em>Add attachment</em></td>
</tr>
<tr>
<td>10/03/2019</td>
<td>Conference Registration Fee</td>
<td>4.00 USD</td>
<td>AEC Conference</td>
<td>United States</td>
<td>Attending conference for staff development</td>
<td><em>Add attachment</em></td>
</tr>
<tr>
<td>10/03/2019</td>
<td>Catering</td>
<td>5.00 USD</td>
<td>Ninfas</td>
<td>United States</td>
<td>Catering for office gathering</td>
<td><em>Add attachment</em></td>
</tr>
</tbody>
</table>
EXPENSE REIMBURSEMENT EFFICIENCIES & CHANGE IMPACTS

- Automated approval routing
- Electronic document storage for transactions
- Single touchpoint for p-card, travel card & cash reimbursements
- Ability to apply spend authorization to expense report
CREATE EXPENSE ITEMS FOR EXPENSE REPORT

Expense Report = Expense Item + Expense Item + Expense Item + Expense Item

CAN BE CREATED THROUGH
1. Expenses work area for expense entry online
2. Spreadsheet upload
3. Credit card transaction feed
EXPENSE TYPES

Airline
Lodging
Car Rental
Meal Per Diem
Conference Registration
Catering
EXPENSE REPORT APPROVALS

Option to approve in Ignite or by email

- **Department Approver**
  - Review and approve fiscal transactions up to $25k

- **Division Approvers**
  - Review and approve fiscal transactions within $25k - $100k

- **University Approvers**
  - Review and approve fiscal transactions greater than $100K
EXPENSE REIMBURSEMENT DEMO

Meet **Lady Bear** from the Library Department who just returned from a **trip to an out-of-town conference**

**Lady Bear** needs to submit an **expense reimbursement** for lodging

**Jane Department Approver** will review and approve **Lady Bear’s expense report** for reimbursement
P2P UPDATES - PROCUREMENT CARDS

At Go-Live:

Continue with same **card holders**

Continue with current **card programs**

Validate p-card **transactions** through expenses
P2P UPDATES - PROCUREMENT CARDS

P-Card Transactions

Marketplace Transactions

Future State MarketPlace/P-Card Transaction Analysis
EXPENSE REPORTS FOR P-CARD DEMO

Meet Lady Bear from the Library Department who had to make an urgent p-card purchase for library supplies.

Lady Bear needs to submit an expense report for her p-card purchases.

Jane Departmental Approver will review and approve Lady Bear’s expense report.
THANK YOU FOR JOINING

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- Expense Reporting for P-card/ Travel Card
- Travel/ Spend Authorization

RAFFLE DRAWING
Congrats to the lucky winner!

QUESTIONS?
- Submit through Mentimeter
- Email ignite@baylor.edu if you would like a direct reply
- Frequently asked questions from today’s session will be posted on the Ignite website

UPCOMING DEMO SESSIONS
Check the Ignite website for upcoming dates and stay tuned for training in late spring
Thank you for joining us today. Please exit the room to allow next session’s attendees to find a seat.