



# Office of General Services Business Services Center

## Information Announcement

### Travel, Credit Card, and Purchasing Training for Customer Agencies

#### September/October 2017

The BSC is continuing its series of training WebExes to provide customer agencies with step-by-step guidance on how to complete critical Credit Card, Travel, and Purchasing Transactions. Agencies can search and register for a WebEx through the Statewide Learning Management System (SLMS) at <https://nyslearn.ny.gov>. The links to the WebEx for each of the trainings will be emailed to participants before each training session.

Below is a listing of the course descriptions that will be offered. Dates, times, and SLMS registration information are listed on page 2 of this announcement.

BSC EE1 Course List	Course Description
Travel 101 – Rules and Regulations (2 hour WebEx)*	This WebEx will cover travel rules, regulations, and guidelines including: responsibilities; official travel status; prior approvals; required documentation; per diem reimbursement rates; when and how the rental car calculator should be used; required receipts; and appropriate uses of the State travel card.
Travel Training for SFS Supervisors (1.5 hour WebEx)*	This WebEx will help supervisors understand their responsibility for approving employee expense reports in SFS. Supervisors will learn what to look for when reviewing expense reports, and when it is appropriate to approve/deny/reject an expense report.
Live SFS (2 hour WebEx)*	This WebEx is targeted for new users and users who require additional assistance with the SFS Travel & Expense Module, and will demonstrate various functions for creating expense reports in the SFS live environment. This class will provide an understanding of BSC best practices and standardized processes including: completing the general information (header) area correctly; attaching receipts and travel documentation; allocating travel card transactions to an expense report; correctly specifying expense types for travel card transactions; when to use “Return to State” appropriately; itemizing and splitting receipts; and how to detail multiple legs of a single trip.
Purchasing Requisitions and Receiving (2 hour WebEx)*	This course will be a two-hour WebEx designed to assist requisitioners and receivers. This training will provide best practices to accommodate the new receiving requirements effective April 1, 2016. Participants will learn how to properly enter a requisition and report receiving on a Purchase order.
Expanding P-Card Use in BSC Customer Agencies (1.5 hour WebEx)*	This course will be a 1.5 hour WebEx designed to educate cardholders on purchasing rules and regulations and the proper use of the P-card and reconciliation processing in order to allow BSC Customers to expand P-Card use.

Purchase Order Change Notices in FileNet 1.5 hour (WebEx)*	This course is designed to educate customer agencies in how to use the FileNet system for requesting Purchase Order change notices.
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\*This WebEx has a minimum class participation requirement; if that minimum is not reached, the class will be cancelled and participants will be instructed to register for a future WebEx.

**SLMS Registration Information:**

Travel & Expense	SLMS Class Code	Date	Time
Travel 101	OGS-BSC-Trav101- 091317WebEx	9/13/17	10am - 12pm
	OGS-BSC-Trav101- 092817WebEx	9/28/17	1pm - 3pm
Travel for Supervisors	OGS-BSC-TravSFSSup 091917WebEx	9/19/17	1:30pm - 3pm
Live SFS	OGS-BSC Trav EE1 090717WebEx	9/7/17	10am - 12pm
	OGS-BSC Trav EE1 092117WebEx	9/21/17	1pm - 3pm

Purchasing	SLMS Class Code	Date	Time
Requisitions and Receiving	OGS-BSC FinReq&Rec 092017WebEx	9/20/2017	11am – 12:30pm
	OGS-BSC FinReq&Rec 102517WebEx	10/25/2017	11am – 12:30pm
Purchase Order Change Notices in FileNet	OGS-BSC PurchOrdChanFile092117	9/21/2017	2pm – 3:30pm
	OGS-BSC PurchOrdChanFile102617	10/26/2017	2pm – 3:30pm

Purchasing & P-Card	SLMS Class Code	Date	Time
Expanding P-Card Use in BSC Customer	OGS-BSC PCardBSCCustAge 092217	9/22/2017	1:30pm - 3pm
	OGS-BSC PCardBSCCustAge 103117	10/31/2017	1:30pm - 3pm

If you have any questions regarding this announcement, please contact the BSC at (518) 457-4272.