



# Office of General Services Business Services Center

## Information Announcement

### Registration Now Open for In-Person Travel & Expense Workshops

**September 19, 2018**

#### Workshop Details

This one-on-one, hands-on workshop will help you learn how to complete a travel and expense report in SFS and provide assistance to resolve any outstanding issues you may be having with a specific trip.

#### What to Bring

1. State Financial System (SFS) User ID and password
2. Details for an expense report that the traveler needs to create or questions regarding an existing expense report
3. Back-up documentation related to the expense report such as receipts
  - a. Documentation can be scanned to users Office 365 accounts prior to class or user can scan to Office 365 account during the workshop
  - b. Office 365 User ID and password

#### Location

W. Averell Harriman State Office Campus, Building 5, training room 635.

#### How to Sign-Up

Sign up for the Travel & Expense Workshop on SLMS, find the class codes below.

SLMS Class Code	Date	Time
OGS-BSC Tvl&Exp Lab 092618 9AM	09/26/18	9am – 11am
OGS-BSC Tvl&Exp Lab 092618 1PM	09/26/18	1pm – 3pm
OGS-BSC Tvl&Exp Lab 101018 9AM	10/10/18	9am – 11am
OGS-BSC Tvl&Exp Lab 101018 1PM	10/10/18	1pm – 3pm
OGS-BSC Tvl&Exp Lab 102418 9AM	10/24/18	9am – 11am
OGS-BSC Tvl&Exp Lab 102418 1PM	10/24/18	1pm – 3pm
OGS-BSC Tvl&Exp Lab 110718 9AM	11/07/18	9am – 11am
OGS-BSC Tvl&Exp Lab 110718 1PM	11/07/18	1pm – 3pm
OGS-BSC Tvl&Exp Lab 112818 9AM	11/28/18	9am – 11am
OGS-BSC Tvl&Exp Lab 112818 1PM	11/28/18	1pm – 3pm
OGS-BSC Tvl&Exp Lab 120518 9AM	12/05/18	9am – 11am
OGS-BSC Tvl&Exp Lab 120518 1PM	12/05/18	1pm – 3pm

OGS-BSC Tvl&Exp Lab 121918 9AM	12/19/18	9am – 11am
OGS-BSC Tvl&Exp Lab 121918 1PM	12/19/18	1pm – 3pm

Don't need individual assistance?  
The BSC offers online Travel training available in SLMS!

## Online Travel Training

Self-paced Travel trainings are available to BSC customers in the Statewide Learning Management System (SLMS). You can take these courses at a time that best suits you, find the training here: <https://nyslearn.ny.gov>.

BSC EE1 Course List	Course Description
<b>Travel &amp; Expense 101:</b> Rules and Regulations for Travelers (SLMS Code: BSC-TravelExpens-101-Travelers)	This course 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.
<b>Travel &amp; Expense:</b> Supervisor 101 (SLMS Code: BSC-Travel-Sup-SFS-EE1-Self)	This course 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.
<b>Traveler SFS Overview:</b> Creating Expense Reports (SLMS Code: BSC-Travel-EE1-Ovrvw-SelfServe)	This course is targeted for new users and users who require additional assistance with the SFS Travel & Expense Module, and will demonstrate how to create expense reports in the SFS live environment. 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.

If you have any questions regarding this announcement, please contact the BSC at (518) 457-4272 or email Travel & Expense at [BSCFinance@ogs.ny.gov](mailto:BSCFinance@ogs.ny.gov) and include **travel** in your subject line.