

## **BSC Travel & Expense Training for June 2014**

The Business Services Center (BSC) is offering a series of training classes in June 2014 to help our customers better understand how to use the Statewide Financial System (SFS) Travel and Expense module. These classes will provide general information on travel guidelines and train users in creating travel expense reports in SFS. We will offer both online and hands-on training.

To register, you will need to sign up through the Statewide Learning Management System (SLMS) at <https://www.nyslearn.ny.gov/>. When signed into SLMS, click on “Find Learning”. In the search field copy and paste the SLMS Class Code or key in “BSC Travel”. This will bring up the scheduled classes listed below.

### **Introduction to Travel for Travelers and Supervisors (2-hour webinar)**

This webinar will cover travel rules and regulations, including: responsibilities; official travel status; prior approvals; required documentation; per diem reimbursement rates; when and how the rental car calculator should be used; when receipts are required; and appropriate uses of the State travel card.

Training schedule for this class:

<b>SLMS Class Code</b>	<b>Date</b>	<b>Time</b>	<b>Location</b>	<b>Max Registrants</b>
OGS-BSC-ITFTS-6-3-14	June 3, 2014	10:00 am – 12:00 pm	WebEx Webinar	99
OGS-BSC-ITFTS-6-12-14	June 12, 2014	1:00 pm – 3:00 pm	WebEx Webinar	99
OGS-BSC-ITFTS-6-1714	June 17, 2014	1:00 pm – 3:00 pm	WebEx Webinar	99
OGS-BSC-ITFTS-6-26-14	June 26, 2014	10:00 am – 12:00 pm	WebEx Webinar	99

### **Travel Training for SFS Supervisors (1.5 hour webinar)**

This webinar 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.

Training schedule for this class:

<b>SLMS Class Code</b>	<b>Date</b>	<b>Time</b>	<b>Location</b>	<b>Max Registrants</b>
OGS-BSC-TTFSS-6-10-14	June 10, 2014	10:00 am – 11:30 am	WebEx Webinar	99
OGS-BSC-TTFSS-6-24-14	June 24, 2014	1:00 pm – 2:30 pm	WebEx Webinar	99

### **Advanced SFS Travel & Expense (2 hour On-Site Training)**

This *on-site* class is an advanced training for employees that need additional guidance due to complex requirements or unique situations. Please note that employees must attend the “General Introduction to Travel” webinar before attending this course. If you are not local and/or are unable to attend this class, it is now also available via webinar (see below).

The trainers will demonstrate how to create an expense report in SFS and provide an understanding of BSC best practices and standardized processes including: completing the general information 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; and how to detail multiple legs of a single trip.

Attendees are encouraged to bring their SFS username and password, and travel documentation to this training.

Training schedule for this class:

SLMS Class Code	Date	Time	Location	Max Registrants
OGS-BSC-ASTE-6-5-14	June 5, 2014	10:00 am – 12:00 pm	50 Wolf Rd. Floor 1, Room C	28
OGS-BSC-ASTE-6-25-14	June 25, 2014	9:30 am – 11:30 am	Corning Tower 29 <sup>th</sup> Floor	9

**Advanced SFS Travel & Expense (2 hour Webinar Training)**

This webinar is an advanced training for employees that need additional guidance due to complex requirements or unique situations. Please note that employees must attend the “General Introduction to Travel” webinar before attending this course.

The trainers will demonstrate how to create an expense report in SFS and provide an understanding of BSC best practices and standardized processes including: completing the general information 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; and how to detail multiple legs of a single trip.

Attendees are encouraged to bring their SFS travel documentation to the webinar training.

Training schedule for this class:

SLMS Class Code	Date	Time	Location	Max Registrants
OGS-BSC-ASTE-6-11-14	June 11, 2014	10:00 am – 12:00 pm	WebEx Webinar	99
OGS-BSC-ASTE-6-19-14	June 19, 2014	1:00 pm – 3:00 pm	WebEx Webinar	99
OGS-BSC-ASTE-6-25-14W	June 25, 2014	1:00 pm – 3:00 pm	WebEx Webinar	99

If you have any questions regarding these training classes, please contact the BSC Travel Unit at [OGSTravel.Unit@ogs.ny.gov](mailto:OGSTravel.Unit@ogs.ny.gov) or (518) 457-4272, Option 1.

## Statewide Learning Management System (SLMS) Registration Instructions

All attendees must register using the **Governor's Office of Employee Relations' (GOER) Statewide Learning Management System (SLMS)** platform, which can be accessed here at <https://www.nyslearn.ny.gov/>.

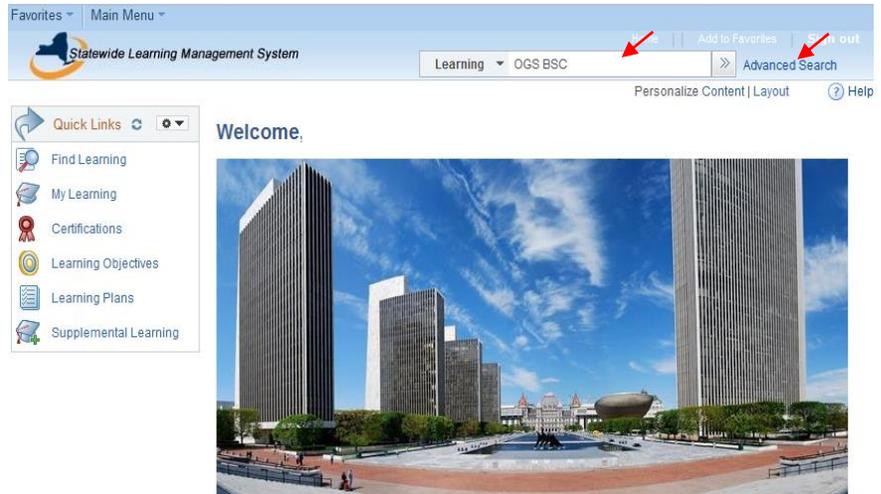
1) Type **BSC Travel** in the search box and select >>.

2) A listing of the BSC Travel & Expense trainings will appear. Scroll down until you see the class you wish to take then click

**Enroll Now**

3) Click **Submit Enrollment**. Your registration is now pending supervisor approval. You will receive an automated email from SLMS with your enrollment status and registration details.

4) The change in status will be updated on the **My Learning**  [My Learning](#) page.



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## WebEx Instructions

Click on the WebEx link provided in the WebEx e-mail from the BSC Travel Training team. On the right hand side of the screen, you will be asked to enter your information. Please enter your name and e-mail address.

 **It's time to join!**

Your name:

Email address:

[\(Clear my information\)](#)

I would like to take a free WebEx trial (email required).

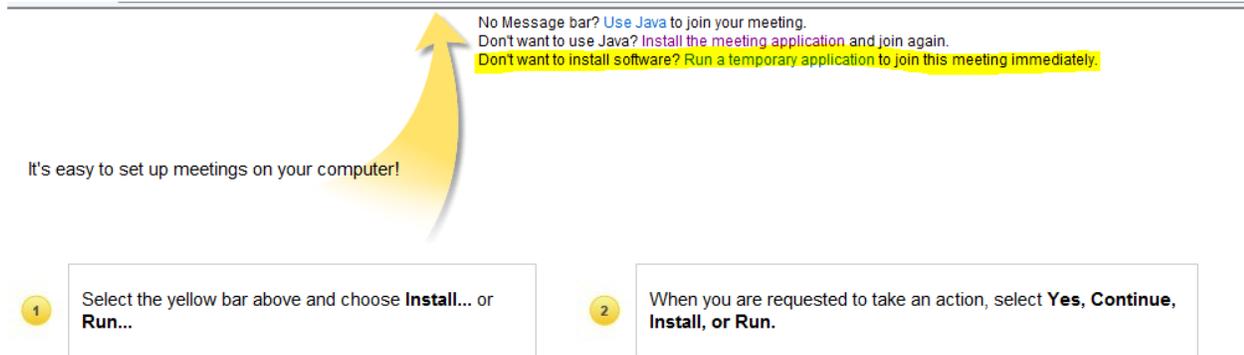
**Join**

Click **Join**.

After clicking **Join**, if the WebEx meeting automatically opens, proceed to **Step 5**.

If you do not have WebEx installed on your computer by ITS or your agencies' Administrator, you will get a pop-up box asking for your Administrator e-mail address and password. With this pop-up box, click **No**. See **Step 1**

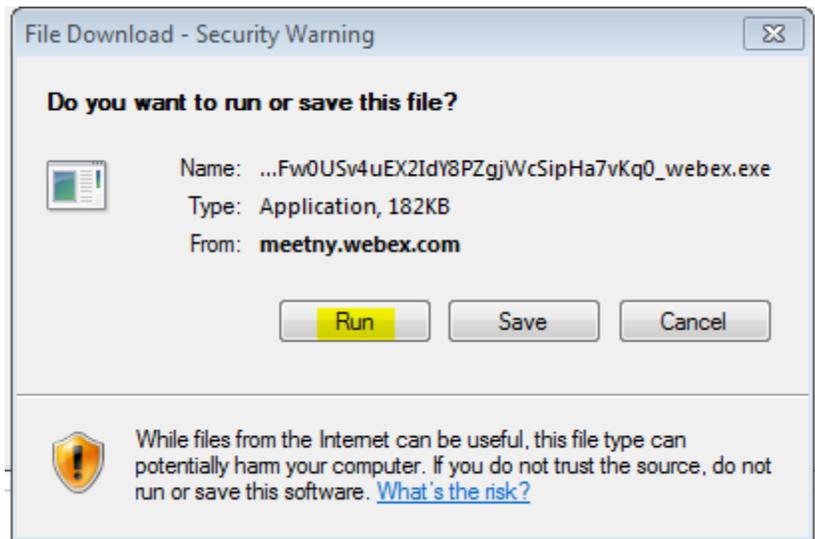
**Step 1:** Once you click **No**, it will bring you to the following screen:



From this screen, you want to click on **Run a temporary application** to join this meeting immediately (see highlight above).

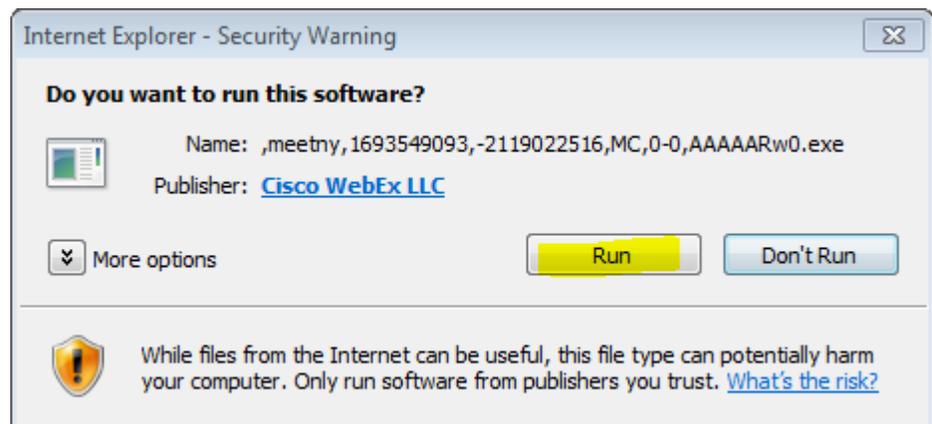
**Step 2:** After clicking **Run a temporary application**, you will receive a pop-up box **File Download – Security Warning**.

Click **Run** (see highlight).



**Step 3:** After clicking **Run** on the File Download – Security Warning pop-up box, you will receive another pop-up box – **Internet Explorer – Security Warning**.

Again, click **Run** (see highlight).



**Step 4:** After clicking **Run** on the Internet Explorer – Security Warning pop-up box, you will receive a pop-up indicating your meeting is downloading. The pop-up box will indicate **Preparing Meeting Center**.

**Step 5:** Once the meeting is downloaded, your screen will show you have entered the meeting (below is a partial screen shot of what your screen will look like).

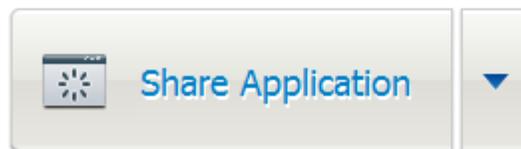


**Teleconference**

(Connected) ✓



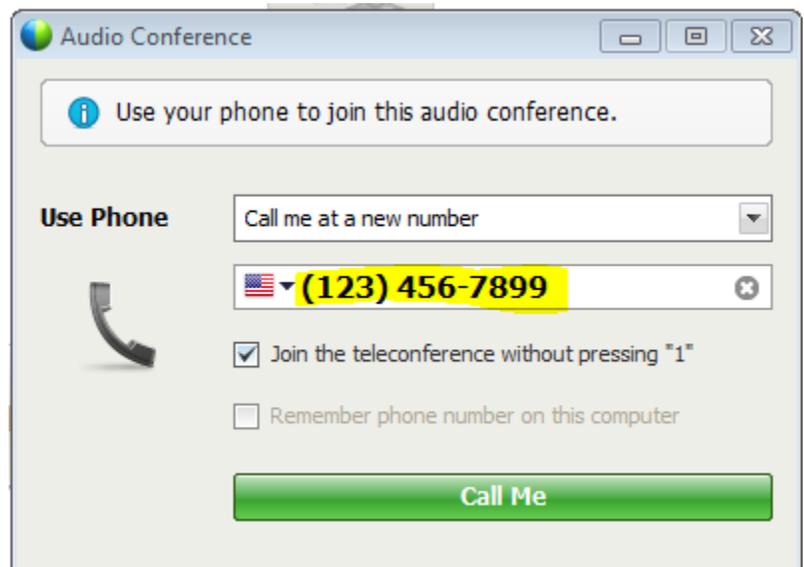
**Invite & Remind**



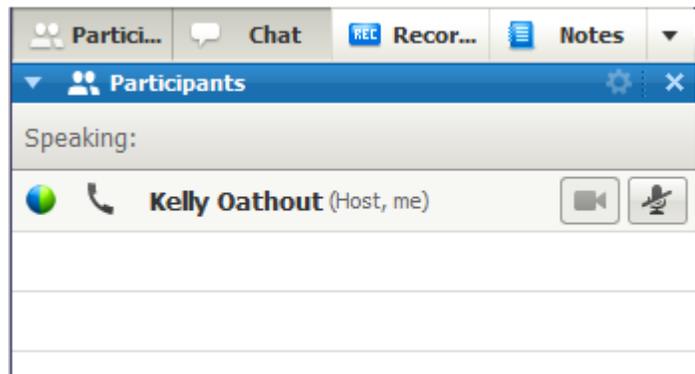
**\*\*Step 6:** An **Audio Conference** pop-up box will appear (on top of the screen shot above). On the line with the American flag, enter the phone number from the phone you are using to access the WebEx webinar.

**\*\*If you do not have a direct line to your desk, do not use this feature.**

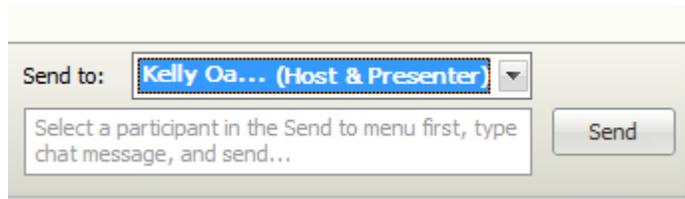
Click the green **Call Me** button.



**Step 7:** The WebEx meeting will call your phone immediately and you are now placed into the Webinar. You will see your name appear and it shows you have joined the call.

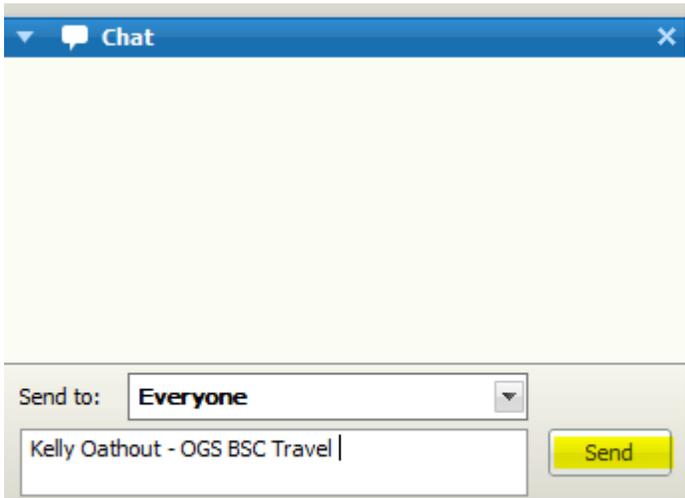


**Step 8:** In the **Chat** field, for the **Send to:** information, click the drop down arrow. Select **Host & Presenter** if you don't wish everyone on the Webinar to see your information.

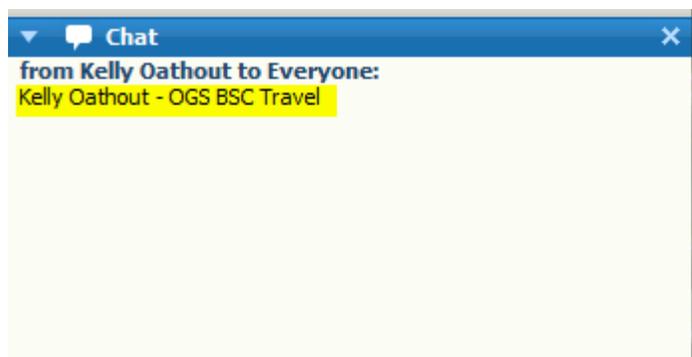


Enter your name, agency and email address in the **Chat** field.

Click **Send**.



**Step 9:** Your information will now appear in the **Chat** box. We will use this information as your **Registration Sign In**.



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**NOTE:** If you do not have a NY.GOV ID, or if you have forgotten your NY.GOV user name or password, please contact your Agency IT Help Desk for assistance in setting up your account and resetting your NY.GOV ID and password. For all other issues, you may contact the SLMS Help Desk at 518-473-8087.