

- PantherSoft Financials Travel Enhancement Project -

Travel Enhancements were made to the PantherSoft Financials Travel Module on Friday, March 8th, 2019. Changes to travel transactions were made to enhance University Credit Card expenses and to respond to user feedback regarding the approval of those charges on a Travel Authorization and/or Expense Report. As a result of the enhancements there are several frequently asked questions or topics that have emerged.

All users must use the **Travel and Expense Tile** to complete travel transactions including approvals.

Visit [Office of the Controller Training Resources](#) page, which includes links to the **Travel and Expense Training PowerPoint**, **Travel and Expense System Manual** and a recorded webinar for the most recent travel enhancements. Scroll to the bottom of the Training Resources webpage to find the Travel & Expense header.

Travel & Expense	
Course Description	This course will cover how to create Travel Authorizations, Cash Advances and Expense Reports.
Target Audience	All Employees who process travel & expense transactions
Offered	Monthly
Training Resources	Travel and Expenses Manual
Webinar Recording	Travel & Expense University Credit Card Enhancements

We invite all users to attend a Travel and Expense training to refresh knowledge and skills. Training dates, times, and registration are available at <http://profdev.fiu.edu> (Search by Department-Office of the Controller, Find Travel & Expense Training).

Please refer to the Frequently Asked Questions for clarification and solutions.

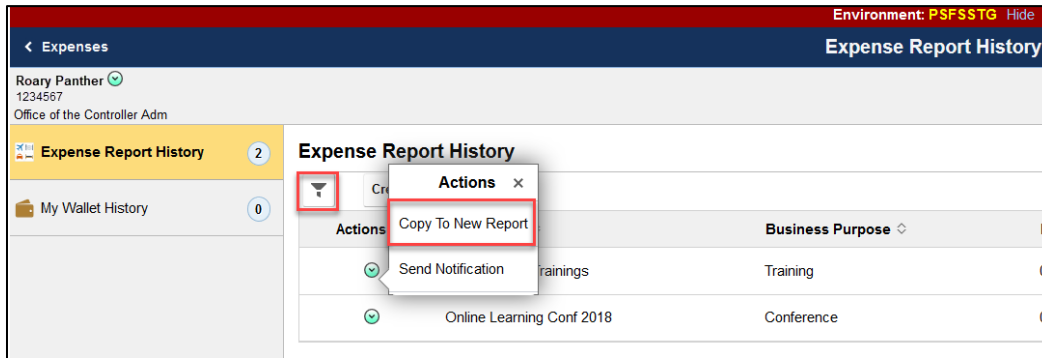
Frequently Asked Questions/Topics

- 1. Topic:** Approvers cannot see the **Approved by** field when they are approving Expense Reports.

Answer: Access an Expense Report from the **Travel and Expense Approvals Tile**. Approvers can see the SpeedType entered within the **Approved by** field at the bottom of the screen under **Responsible Party**.

2. **Topic:** Users cannot ‘populate’ a new Expense Report (ER) from an existing ER.

Answer: Navigate to the **Expense History Tile** and find the expense report to copy to a new report. Click on the funnel icon to search for the expense report by date, Report ID, etc. Once the existing report is found, click on the green **Actions** drop-down and select **Copy to New Report**.



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3. **Topic:** The navigation or Main Menu navigations (**NavBar**) are no longer fully functional.

Answer: PeopleSoft now has a new User Interface which is functional via the Tiles. This was released in October 2018 as part of the upgrade. As functionality becomes available in the Tiles, the navigation menus are no longer supported.

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4. **Topic:** Unable to use ‘University Credit Card’ **Payment Type** for Foundation expenses.

Answer: If transaction is paid with the Foundation card, enter the information in the **Benefit to FIU** box.

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5. **Topic:** Users are unable to modify accounting distribution via the **Accounting Default** functionality for transactions created prior to the change.

Answer: In the new version of PantherSoft, updating **Accounting Defaults** only applies to new transaction lines.

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6. **Topic:** Changing the **Payment Type** for copied lines does not update the accounting distribution.

Answer: The copy functionality exists, however users cannot change from or to the ‘University Credit Card’ as a **Payment Type**.

7. **Topic:** Web link in email sent to approve travel transactions, does not work.

Answer: Approvers can navigate to **Travel and Expense Approvals Tile** within the **Manager Self Service** homepage to approve travel transactions. The technical team is working on this issue.

8. **Topic:** Approval workflow is displaying 'Department Manager' instead of 'Expense Manager' or 'Project Manager'.

Answer: The technical team is working on this issue.

Help & Resources

- **FSSS Help Desk**
Ph: 305-346-7200
Email: controller@fiu.edu
Office of the Controller

- **Travel Department Staff**
[Travel Staff Contact List](#)