



COMPASS MYTHBUSTERS: THE TRUTH ABOUT PROCURE TO PAY

FOR YOUR INFORMATION

Travel & Expense: Avoiding Common Pitfalls



Myth: I can update an invalid account number error on the Expense Report page for items brought over from My Wallet.

Truth: You can only make changes to the Expense Type within My Wallet. You should check to make sure that the My Wallet Expense Type is valid before adding it to the Expense Report.

Job Aid: [How to Create an Expense Report? \(Reassign Expense Types\)? Pg. 5](#)

Myth: I must contact the Finance Support Center to withdraw my Expense Report.

Truth: You can withdraw an Expense Report for edits or deletion if the first approver has not taken action.

NEW Job Aid: [How do I Withdraw an Expense Report?](#)

Myth: I have to enter the SpeedType on every line on my Expense Report.

Truth: Although a SpeedType is required for each line of your Expense Report, you do not have to enter it line by line. You can use the Accounting Default feature to assign a SpeedType to the entire expense report.

Job Aid: [How do I Create an Expense Report \(Accounting Defaults\)? Pg. 3](#)

Myth: The SpeedType should NOT disappear after I enter it.

Truth: The SpeedType is literally a shortcut that populates the ChartField string, and is meant to disappear after entry. The "SpeedType Ref" field stores the value of the SpeedType that you entered.

Caution: If you need to change the SpeedType on your transaction, **DO NOT** use the "SpeedType Ref" field. Enter the new information in the SpeedType field.

Payment Request: The Check is in the Mail...I Think



Myth: I have contact the Finance Support Center to check the status of my payment request.

Truth: You can use the Payment Request Center to:

- 1) Check the Status of a Payment
- 2) Review Workflow
- 3) Locate Payment Details



NEW Job Aid: [How do I the Check Status of My Payment Request?](#)

Myth: There is no comprehensive list for the Payment Request status.

Truth: There is a comprehensive list that includes eight payment statuses and their definitions.

[Tips & Tricks Accounts Payable](#)

Myth: There is no assistance available for International Wire Payment Request.

Truth: There are three International Wire Outreach Sessions over the next couple of weeks that will cover the following topics:

- Common errors when entering International Wires
- Finding the correct IBAN
- Difference between International USD and International Foreign wires

[Register for a session in ELMS](#)

P-Card: Reconciling & Approving Made Simple



Myth: There is no easy way to locate the items that I need to reconcile on my P-Card.

Truth: There are three key fields that will help you locate the items that you need to reconcile on your P-Card:

- 1) Statement Status = "Staged"
- 2) Transaction Date = 11/16/2016 – current date
- 3) Rows Per Page = 200

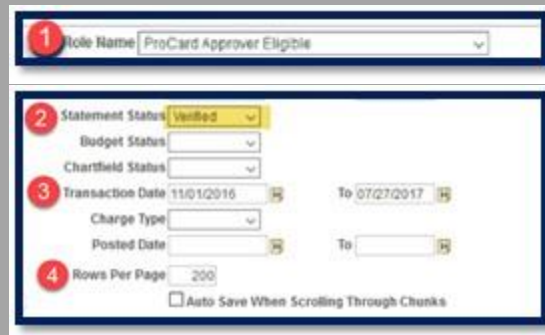


UPDATED Job Aid: [How do I Reconcile a P-Card Statement?](#)

Myth: There is no easy way to locate the items that I need to approve for a P-Card.

Truth: There are four key fields that P-Card Approvers can use to locate the items that need to be approve.

- 1) Role Name = ProCard Approver Eligible
- 2) Statement Status = "Verified"
- 3) Transaction Date = 11/16/2016 – current date
- 4) Rows Per Page = 200



UPDATED Job Aid: [How do I Approve a P-Card Statement? \(Reconciled Statement\)](#)

Emory Express: Everything you Wanted to Know About Payment and Requisition Status



Myth: I do not have the access to check the payment status on a Requisition or a Purchase Order.

Truth: If you have access to Emory Express, you have the ability to check the payment status of a Requisition or Purchase Order.

NEW Job Aid: [How do I Check the Payment Status on a Requisition or Purchase Order?](#)

Myth: Once I enter a Requisition, it goes into a black hole and no one can determine when it will come out.

Truth: If you have access to Emory Express, you have the ability to check the status of a Requisition. You can also determine where it is in the workflow.

NEW Job Aid: [How do I Check the a status of a Requisition?](#)



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