Campus Partners Quarterly

Administrative Office Building (AOB), Shared Services

2601 E Colorado Ave, CampusPartners@du.edu

The Team

We want to welcome our new campus customers in UAP, OTL, and the Registrar's Office!

Tammy Schneider will continue leading the team as the main contact for dean, director, and department heads.

Adam Smith has joined *Sandy Burke* and *Ashley Davis* as Business Officers on the Campus Partners team and they will continue to assist customers with budget tracking, payments, contracts, hiring, and other departmental operational needs.

Keep an eye out for messages from *Huong Trang*, as well, as she will continue assisting the team in an administrative capacity with a focus on Pioneer Travel and Expense.

Need to contact the team?

To help our team best manage our customer inquiries, please try to keep each request as a single email. If you tag a new inquiry onto a previous email correspondence, old resolved "tickets" in our system are re-opened.

Struggling with who to contact?

From left to right: Huong Trang, Tammy Schneider, Ashley Davis, Adam Smith, and Sandy Burke

When emailing the team inbox, it is not necessary to also tag a member of the team. Tammy, Sandy, Ashley, and Adam all have access to the *CampusPartners@du.edu* inbox.

Contact Knowledge Base	Contact Regarding:
CampusPartners@du.edu	Payments, Contracts, POs, P-Card Limit Increase Requests, Hiring, Budget and any other needs
SharedServices@du.edu	Pioneer Travel and Expense (Concur) and PioneerTime
Vendor-Info@du.edu	Vendors (status, W9/registration form)
Sarah.Miller115@du.edu	DU Purchasing Card (P-Card/Declining Balance Card) and Staples Business Advantage

Campus Partners Quarterly

Pioneer Expense Tips and Tricks

August 2019 Expenses [Davis, Ashley]

Summary | Details ▾ | Receipts ▾ | Print / Email ▾

Report
Report Header
Totals
Audit Trail
Approval Flow
Comments

Allocations
Allocations

Exceptions

Expense Type		Exception
Group Meals	20	⚠ Please review the reason prov
Contract Servi.	71	⚠ Please review the reason prov

Expenses

	ense Type	Ente
⊘⊖...	ting/Photocopying/Stationery	DIL
⚠ ⓘ	Contract Services	ACA

Reconciling an Expense Report? *Struggle with reconciliation as a delegate, assigning an expense type, or navigation within the system?*

As a delegate, you may have access to make requests and build reports on behalf of another employee, but the system requires that the owner of the report process the final submission.

- Delegates can also forward receipts to the system by indicating the assignee's email in the subject line
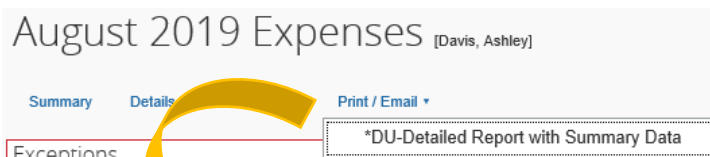
Delegate → From ▾ : Ashley.N.Davis@du.edu
Send | To... : ☐ receipts@concur.com;
Cc... :
Bcc... :
Assignee → Subject : Tammy.Schneider@du.edu

Another great feature of Pioneer Travel and Expense is the automatic assignment of the expense type for majority of P-Card transactions.

- Remember to always review the expense type (account code) assigned and to be consistent. Keep in mind that these should be as specific as possible. The Account Code Crosswalk (see the Knowledge Base) is a great resource to help!

  Equipment Rentals, Flowers and Decorations, Internet/Phone/Mobile Fees, and Catering Services are some more specific account examples versus a more general code, such as Program Materials/Supplies.

Details

Report Header
Update the title of your report and other full report settings

Comments
Notes on why a report was returned and other report-level notes are found here

August 2019 Expenses [Davis, Ashley]

Summary | Details | Print / Email ▾

*DU-Detailed Report with Summary Data

Exceptions

Want to do a quick report review?

The DU-Detailed Report with Summary Data provides a high-level overview of the report.

Updated University Policies

New Travel and Expense policies effective September 1, 2019,
including a new detailed charts of allowable expenses!!

https://www.du.edu/bfa/policies.html

University Approved Policie...

BUSINESS AND FINANCIAL AFFAIRS
University Approved Policies

Home

UNIVERSITY APPROVED POLICIES

Staff

Legal Notices

Disclosure Statements

⊞ **BENEFITS**

⊟ **BUSINESS OPERATIONS**

- Business Expense Policy (2.30.011), 1-Sept-2019   *New!*
- Check Cashing (2.30.040), 8-Jun-2018
- Credit Card Data Security Policy (2.30.070), 8-Jun-2018
- Identity Theft Prevention Policy (2.30.060), 8-Jun-2018
- Property Control (2.30.050), 8-Jun-2018
- Speaker and Events (2.30.080), 8-Jun-2018
- Supplier Code of Conduct (2.30.016), 8-Jun-2018
- Travel Expense Policy (2.30.012), 1-Sept-2019   *New!*
- Reimbursement Policy (2.30.017), 1-Sept-2019   *New!*
- Works of Art and Collections Acceptance & Display Policy (2.30.055), 8-Jun-2018
- Supplier Diversity and Inclusion Policy (2.20.070), 28-Sept-2018

Use the Shared Services Knowledge Base to access the detailed charts of allowable expenses.

☰ Knowledge base (DU Shared Services)

🔍 Chart ✕

showing 4 out of 4 search results for 'Chart'

📄 Chart of Allowable Business Expenses
Payments / Payments

📄 Chart of Allowable Travel and Entertainment Expenses
Pioneer Travel & Expense / Pioneer Travel and Expense

Access these resources directly from the Knowledge Base versus saving to your computer to always have the most up-to-date information

Campus Partners Quarterly

More expense questions?

Phone a friend- The Shared Services Specialists are available Monday through Friday from 8AM until 4:30PM. Give them a call at X1-7420 or email at sharedservices@du.edu.

Get one-on-one help at a drop-in session- Shared Services offers one-on-one help in Anderson Academic Commons room 184 every Friday from 9AM until 12PM. Stop by with questions and bring your receipts/paperwork if you need!

Search the Knowledge Base- The Shared Services Knowledge Base contains tons of helpful resources. Access this resource via PioneerWeb under *Administrative Processes>Pioneer Travel and Expense*.

Request a department training- If your department or unit would like to request a specific training, submit a request to sharedservices@du.edu.

Shared Services Specialists

Drop-in Sessions

Knowledge Base

Training Session

The pdf version of this document contains active links*