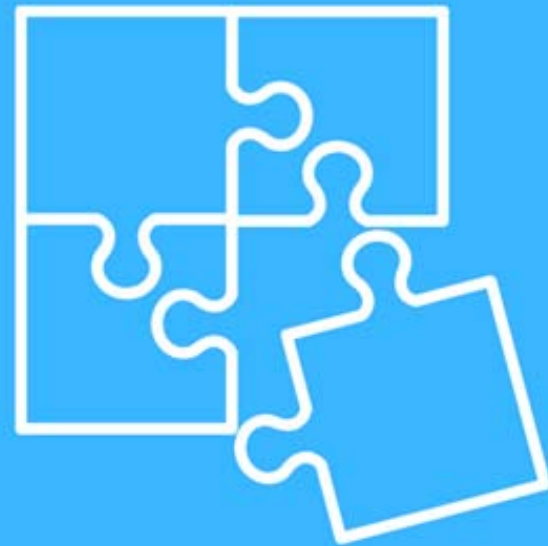


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Understanding the Updated **ERDD - Web Application**

Financial Advisory Services & Training (FAST) Team

Connect + Learn



UNIVERSITY OF
TORONTO

Financial Services



Agenda

- What is the ERDD – Web Application?
- What has changed?
- What has not changed?
- Navigating the New Interface
- Saving and Posting Expense Claims
- Searching for Saved Claims
- DEMO
- Contacts and Additional Resources

What is the **ERDD - Web Application**?

The Expense Reimbursement Direct Deposit (ERDD) – Web Application enables **University staff to enter, save, post and review expense claims** using a user friendly, and accessible interface.

Accessed through the **Employee Self-Service portal**, the ERDD – Web application is a **convenient tool for staff to enter claims without utilizing FIS.**





What has Changed?

Go Live – June 14th, 2021

- **New modernized** and **simplified user interface**
- **Improved accessible user experience** for entering, locating and posting expense reimbursements
- Convenient and efficient **search functionality**

What Has Not Changed

- Accessed through the Employee Self-Service (ESS) portal
- Access/authorization is based on user profile (e.g., Business Officer status with AMS Posting access VS Non-Business Officer status with no posting access).
- Claimants must still notify Business Office(r) of the claim outside of the ERDD – Web Application (i.e. via email/message)
- Relationship between ERDD – Web Application and AMS is still one way street (i.e. can post to AMS, but any changes to the ERDD after posting must be made in AMS)
- Expense categories have not changed, and align with the Expense Reimbursement form

Accessing the ERDD – Web Application

ERDD will still be accessed by clicking the **Expense Reimbursement** tab in ESS

UNIVERSITY OF TORONTO | Administrative Web Services

Log off

Welcome: Rames Paramsothy

To protect the security of your data, this application will automatically terminate in 03:48:56. Unsaved work will be lost.

Welcome | Inbox | My HR Self-Service | **Expense Reimbursement**

Landing Page

Welcome > Landing Page

Full Screen

To access individual services please select the relevant application from the tabs above.
Pop-ups must be enabled for My Research.

Planned Downtimes	
ESS	No planned downtimes for the week.
My Research	No planned downtimes for the week.

Need Help? Please see [Help Desk Info](#)

If you have multiple tabs open when signing out, after pressing the "logoff" button wait until logoff is complete. **NEW**

Mac Big Sur Users, Chrome and Safari browser issues have been resolved.

Phonebook Directorv: Staff may edit the phone number and email address in their own listing. [Update your contact information.](#)

What's New – Improved Search Functionality

Users can now easily search for saved and posted claims on the main ERDD – Web Application landing page using one of the many search features.

The screenshot displays the 'Expense Reimbursement' section of the 'Administrative Web Services' portal. At the top, there is a navigation bar with 'Welcome', 'Inbox', 'My HR Self-Service', and 'Expense Reimbursement'. Below this is a search bar with the following fields: 'Audit Number:', 'FI Document Number:', 'Claim Name:', 'Personnel Number:', 'Claimant Name:', and 'Status:'. A 'Clear' button and a 'Go' button are located to the right of the search fields. Below the search bar, there is a table titled 'All Claims (94)' with a 'Create New Claim' button. The table has the following columns: 'Audit Number', 'FI Document Number', 'Claim Name', 'Personnel Number', 'Claimant Name', 'Status', and 'Last Updated On'. The table contains five rows of claim data, each with a 'View' or 'Edit' link.

Audit Number	FI Document Number	Claim Name	Personnel Number	Claimant Name	Status	Last Updated On	
2022098750	2350621986	NY CONF	1127627	Rames Paramsothy	Submitted to AMS for direct deposit	Jun 7, 2021	View >
2022098749	N/A	NY CONF	1127627	RAMES PARAMSOTHY	Submitted for processing to Business Officer	Jun 7, 2021	Edit >
2022098748	2350621985	NY CONF	1127627	Rames Paramsothy	Submitted to AMS for direct deposit	Jun 7, 2021	View >
2022098747	2350621984	NY CONFERENCE	1053204	Maryanne McCormick	Submitted to AMS for direct deposit	Jun 6, 2021	View >
2022098746	N/A	NY CONF	1127627	RAMES PARAMSOTHY	Submitted for processing to Business Officer	Jun 4, 2021	Edit >

If a claim does not appear, you can search by:

- Audit Number
- FI Doc Num.
- Claim Name
- Personnel Num.
- Claimant Name
- Status

List of claims that users are authorized to view.

Creating a Claim

ERDD will still be accessed by clicking the **Expense Reimbursement** tab in ESS

Select whether you are creating the ERDD for yourself or another staff member (e.g., PI).

The screenshot shows the 'All Claims' page in ESS. At the top, there are three input fields: 'Audit Number:', 'FI Document Number:', and 'Claim Name:'. Below these is a table of existing claims. A blue button labeled 'Create New Claim' is highlighted with a red box. A red arrow points from a text box on the left to this button. A modal window titled 'Create New Claim' is open, showing a note: 'Note: Original receipts are required for expense reimbursement'. Below the note, the question 'Who are you creating this claim for?' is followed by two radio button options: 'Myself' (which is selected and highlighted with a red box) and 'Others'. A second red arrow points from a text box on the left to the 'Myself' radio button.

Audit Number	FI Document Number	Claim Name	Pe
2022098750	2350621986	NY CONF	11
2022098749			
2022098748			
2022098747			
2022098746			

Create New Claim

Note: Original receipts are required for expense reimbursement

Who are you creating this claim for?

Myself

Others

Improved Layout of Expense Categories

Expense Categories are now organized into dropdowns.

OLD

		Amount (Cdn\$)	
Airfare	Travel within Canada		
Attach proof of payment & proof of air travel	Travel to USA from Ontario		
	All other Airfare		
Accommodation	ON (13%HST)		
	PEI, NS, NF, NB (15%HST)		
	All other provinces / territories		
	USA / International		
Allowance	Per Diem:	In Canada	USA/International
*Tax codes used for Allowances as follows:	# of Breakfasts	<input type="text"/> x\$15/day	<input type="text"/> x\$20/day
	# of Lunches	<input type="text"/> x\$20/day	<input type="text"/> x\$25/day
	# of Dinners	<input type="text"/> x\$45/day	<input type="text"/> x\$55/day
EA = In Canada EO = USA/Intl	OR	<input type="text"/> x\$80/day	<input type="text"/>
	# of days	x\$100/day	
	# of kilometers	<input type="text"/> x \$0.57/km	
Rail / Bus	Travel within Canada		
	Travel outside Canada		
Public Transit	Travel within or outside Canada		
Car Rental	ON (13%HST)		
	PEI, NS, NF, NB (15%HST)		
	All other provinces / territories		
	USA / International		
Meals	ON (13%HST)		
	PEI, NS, NF, NB (15%HST)		
	All other provinces / territories		

NEW

The screenshot shows the 'Administrative Web Services' page for the University of Toronto. A red arrow points from the 'Expense Reimbursement' dropdown menu in the 'NEW' section to the corresponding 'Expense Reimbursement' section in the 'OLD' section. The dropdown menu is open, showing a list of categories with expandable arrows:

- > Airfare
- > Accomodations
- > Allowance - Meals
- > Allowance - Mileage
- > Rail/Bus
- > Public Transit
- > Car Rental
- > Meals



Where can I **learn more?**

FIS

For detailed reference guides, simulations and articles related to the updated ERDD - Web Application, please visit our [Documentation & Support page](#).

If you have any questions/issues, please contact your [FAST Team Representative](#) or email fast.help@utoronto.ca



