How to handle employee expense reports in WMS Acquisitions?

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Applies to

• WorldShare Acquisitions

Answer

Make sure that whatever you are reimbursing the staff for has a fund in your budget with money in it. Then, you have two options:

• You can either create an invoice where the vendor is the staff member with a local resource invoice item called “reimbursement” for example with the amount to be paid to the staff member. The problem is that all the information is lost regarding what you are reimbursing the staff member. But you could put this information in a note field.

• Or you can create an invoice for the items the staff member paid for with the vendor that the staff member paid. (You could even create orders and order items if the items in question were bibliographic materials.) Then pay the invoice with a note that says the items were paid for by the staff but reimbursed by the library. This way, the library knows what they paid for even though they paid the staff member.

If this were for travel or conference expenses, option two as the best option. For “vendor,” you could use the staff member as the vendor or just “travel expenses” and put the staff member’s name in the invoice note. You would call the local resource invoice item “travel expenses”.

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