

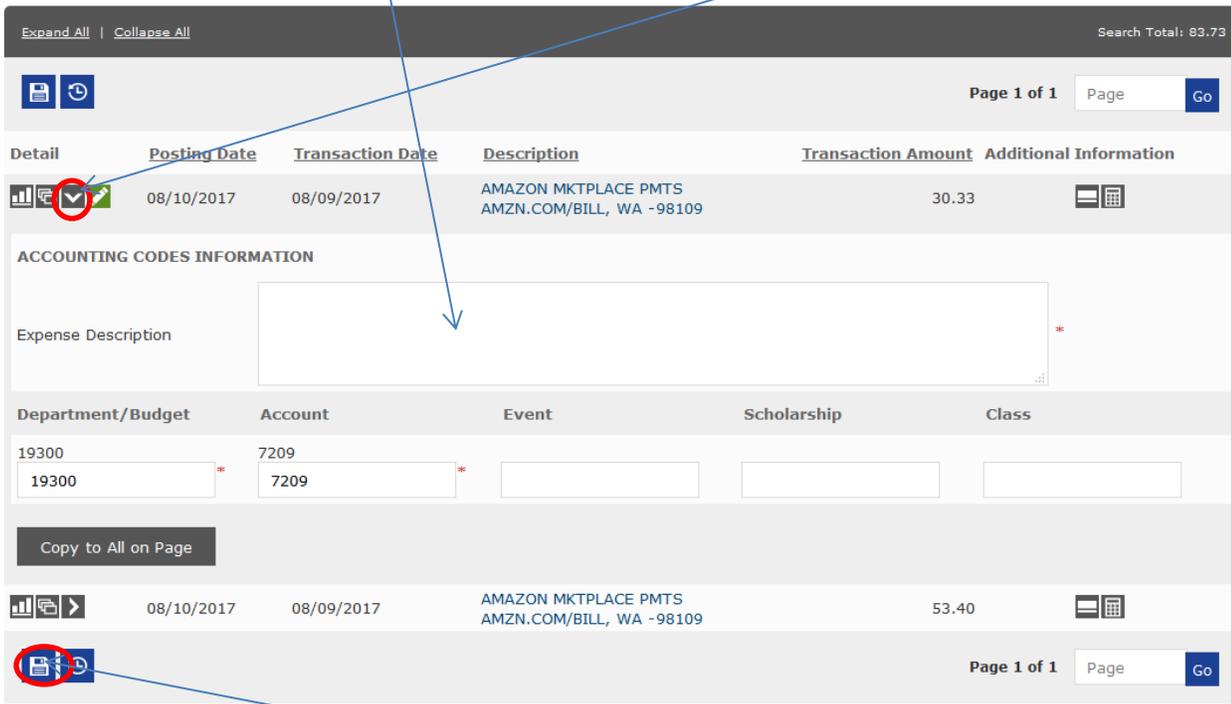
**Anderson University**  
**Business Office**  
**MasterCard SDG2 Quick User Guide**  
**DO NOT USE CHROME**

**A. Review expenses and make budget allocations**

1. Go to [mastercard.anderson.edu](http://mastercard.anderson.edu) or sdg2.53.com. It might be good to add this to your favorites.
2. From the Home page, click on the Account Activity link and then select the Transaction Summary menu item in the dropdown menu
3. In the Search Criteria box, select Reporting Cycle; change cycle if needed by using the down arrow



4. Search
5. In the Search Results:
  - a. Click on the Edit Accounting Codes carrot for single expense. This will open up the expense description box to enter Business Purpose expense description, who, what, when, where, why



Expand All | Collapse All Search Total: 83.73

Page 1 of 1

Detail	Posting Date	Transaction Date	Description	Transaction Amount	Additional Information
	08/10/2017	08/09/2017	AMAZON MKTPLACE PMTS AMZN.COM/BILL, WA -98109	30.33	 

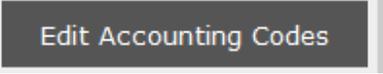
**ACCOUNTING CODES INFORMATION**

Expense Description

Department/Budget	Account	Event	Scholarship	Class
19300 <input type="text" value="19300"/>	7209 <input type="text" value="7209"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

	08/10/2017	08/09/2017	AMAZON MKTPLACE PMTS AMZN.COM/BILL, WA -98109	53.40	 
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- b. Enter budget allocations in the budget and account boxes.
- c. To save all budget allocations, click Save after each transaction.
- d. Click on next transaction carrot and you will see  Which you will click on and proceed in the same manner throughout your report continuing to save after each transaction.

**\*\*SPLITS\*\***

Sometimes it is necessary to make splits in one transaction.

**SEARCH RESULTS**

Expand All | Collapse All Search Total: 32.79

Page 1 of 1

Detail	Posting Date	Transaction Date	Description	Transaction Amount	Additional Information
	02/09/2015	02/06/2015	EPIC OFFICE FURNITURE GARDEN GROVE, CA -92841	32.79	

Page 1 of 1

Expand All | Collapse All Search Total: 32.79

1. Click on the Split Icon. 
2. Click ADD.

**SPLIT TRANSACTION**

RANDY COPPESS • XXXX-XXXX-0518-5808 (Active) • Vanessa Tijerina • C/O RANDY COPPESS - 1100 E 5TH ST • ANDERSON, IN 460123462

Financial Detail | Split Detail

Posting Date	Transaction Date	Description	Transaction Amount	Net Transaction Amount	Additional Information
02/09/2015	02/06/2015	EPIC OFFICE FURNITURE GARDEN GROVE, CA -92841	32.79	32.79	

Split(s):

Split By: Amount | Split and Balance To: Total Transaction Amount

3. Enter your description in the description field. **\*\*note, this does not designate your budgets, this is just your business purpose description\*\***

Posting Date	Transaction Date	Description	Transaction Amount	Net Transaction Amount	Additional Information
08/10/2017	08/09/2017	AMAZON MKTPLACE PMTS AMZN.COM/BILL, WA -98109	30.33	30.33	

Split(s):

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Remove **Expand All** | **Collapse All**      Split By:       Split and Balance To:

Description	Percent	Amount
<input checked="" type="checkbox"/> <input type="checkbox"/> for BO storage, utility room.	50.00	<input type="text" value="15.17"/>
<b>ACCOUNTING CODES INFORMATION</b>		
Department/Budget	Account	Event
19300	7209	
19300	7209	
<input type="button" value="Edit Accounting Codes"/>		
<input checked="" type="checkbox"/> <input type="checkbox"/> for HR storage, utility room	50.00	<input type="text" value="15.16"/>
<b>ACCOUNTING CODES INFORMATION</b>		
Department/Budget	Account	Event
19300	7209	
19450	7209	

4. Save. After it has saved. You will have the Accounting Detail Icon. 
5. Click on Accounting Detail. Now you will have the opportunity to enter your accounting detail, the budget numbers and the amounts you want to go to each budget/account #. For the second entry, you will need to click on the Edit Account Code button and proceed as normal.
6. Save (ALWAYS SAVE)

**B. Create and print an expense report**

1. Hover over Reports and click on Run
2. Select Travel Reports, down arrow to the right

Home My Profile Account Activity **Reports**

**Run**

1. Reporting Entity: RANDY A COPPES

2. Report Name: Select report below

My Exports <input type="button" value="v"/>	<b>FAVORITES</b> No favorite reports defined
Accounting and Reconciliation Reports <input type="button" value="v"/>	
Travel Reports <input type="button" value="^"/>	
<input type="checkbox"/> Expense Report <input type="button" value="i"/>	

3. Then click on the band that says **Expense Report**
4. Everything should default correctly with the exception of **#5 Criteria**. Click on the down arrow for that, and click in the last box, Include Split Transactions.

- Click on the down arrow in #6. Frequency and navigate to the last option Reporting Cycle and click in that option. Check the dates that populate for accuracy. They should default correctly. It should now look like this.

**5. Criteria:** Select criteria below ^

Date Type  
Posting v

Report Type  
Adobe PDF v

Number Format  
XX,XXX.XX v

Date Format  
MM/DD/YYYY v

Account Status  
8 Selected v

Account Type  
Include Account Financials Only v

Report Notes

0/1024

Include Split Transactions

5. C

**6. Frequency:** Reporting Cycle ^

Once      Reporting Cycle: Ending August 15, 2017 (07/18/2017 - 08/15/2017) v      Date Type: POSTING

Daily

Weekly      Schedule Offset (in days): 0 v      Number of cycles to run: 1 v

Monthly

Reporting Cycle

**7. Deliver Options and Notifications:** System Inbox & RACOPPESS@ANDERSON.EDU v

Submit Request

Cancel

- Hit **Submit Request** button.
- You should receive a green message bar that says **Expense Report Scheduled Successfully**.
- This will take you back to the Dashboard and you should see your report in the either under the completed folder or in the scheduled one. Click your refresh button until it appears and you can download and print it.

**Dashboard**

COMPLETED    SCHEDULED ↻

Name	Size	File Format	Completed Date
Expense Report	174.03 KB	.pdf	08/22/2017
Expense Report	174.03 KB	.pdf	08/21/2017
Expense Report	174.03 KB	.pdf	08/21/2017
Expense Report	174.03 KB	.pdf	08/21/2017

**Expense Report** ⓘ

Download

**Entity Name** RANDY A COPPESS

**From Date** 07/18/2017

**To Date** 08/15/2017

**Frequency** Custom

**Created By** System

**Size** 174.03 KB

**Start Date** 08/22/2017 07:31 -05:00

**End Date** 08/22/2017 07:32 -05:00

**Duration** 17 seconds

**Last Run Date** 08/22/2017 07:32 -05:00

**C. View Account Information, change password and log off**

1. To view your cardholder account information
  - a. From any screen once logged in, click on the Account Activity link and then select the Account Information menu item in the dropdown menu
  - b. Here you will find
    - i. Your account name
    - ii. Your account number with the first eight digits masked
    - iii. Your credit limit
    - iv. Your user ID
    - v. Your primary department and account/budget on file
2. To change your password (many find it easier and more useful to call me (randy, x4001) to send them a password).
  - a. From any screen once logged in, click on the My Profile link on the upper right corner of your screen
  - b. Change your password in the User Password box
  - c. On this screen you can also
    - i. View your user ID
    - ii. Change your email address
    - iii. Change your security question and answer
3. To log off
  - a. From any screen once logged in, click on the Logout link on the upper right corner of your screen.

**Should you have questions or experience problems with your access to SDG2 for MasterCard, please contact:**

Randy Coppess  
Office Manager  
(765) 641-4001  
[racoppess@anderson.edu](mailto:racoppess@anderson.edu)