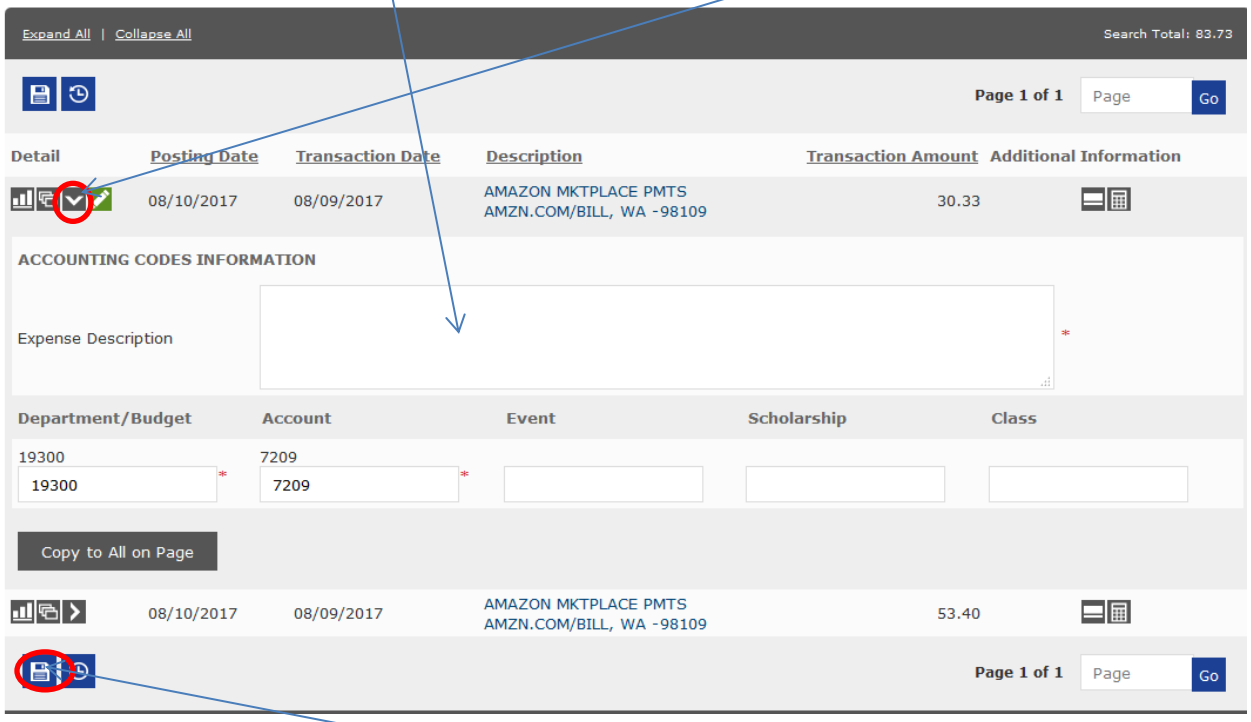
Anderson University
Business Office
MasterCard SDG2 Quick User Guide
DO NOT USE CHROME

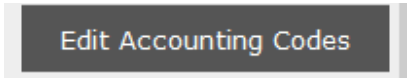
A. Review expenses and make budget allocations

1. Go to mastercard.anderson.edu 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



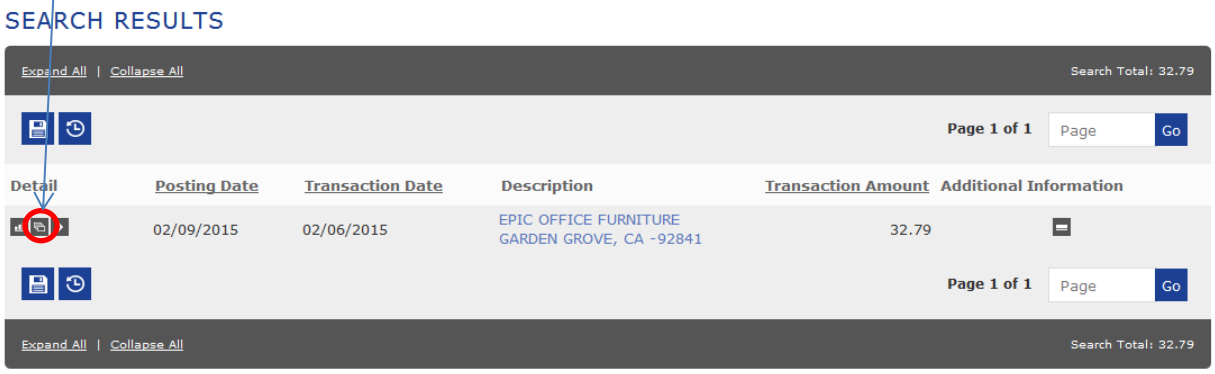
   b. Enter budget allocations in the budget and account boxes.
   c. To save all budget allocations, click Save after each transaction.



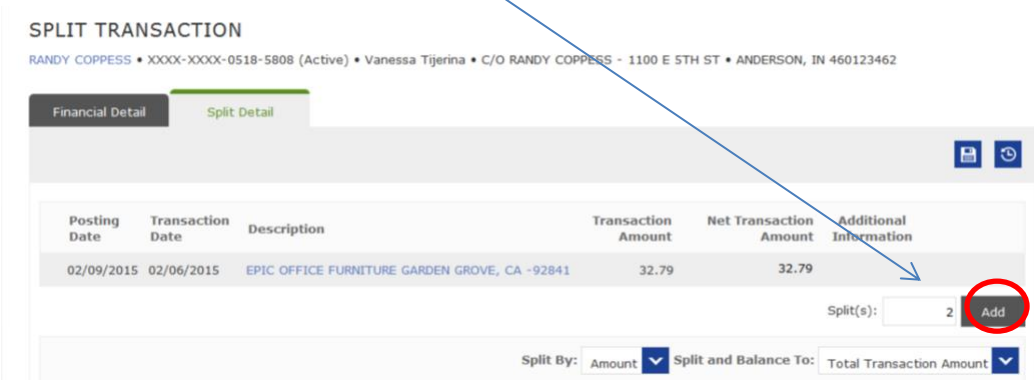
   d. Click on next transaction carrot and you will see
   Which you will click on and proceed in the same manner throughout your report continuing to save after each transaction.

SPLITS

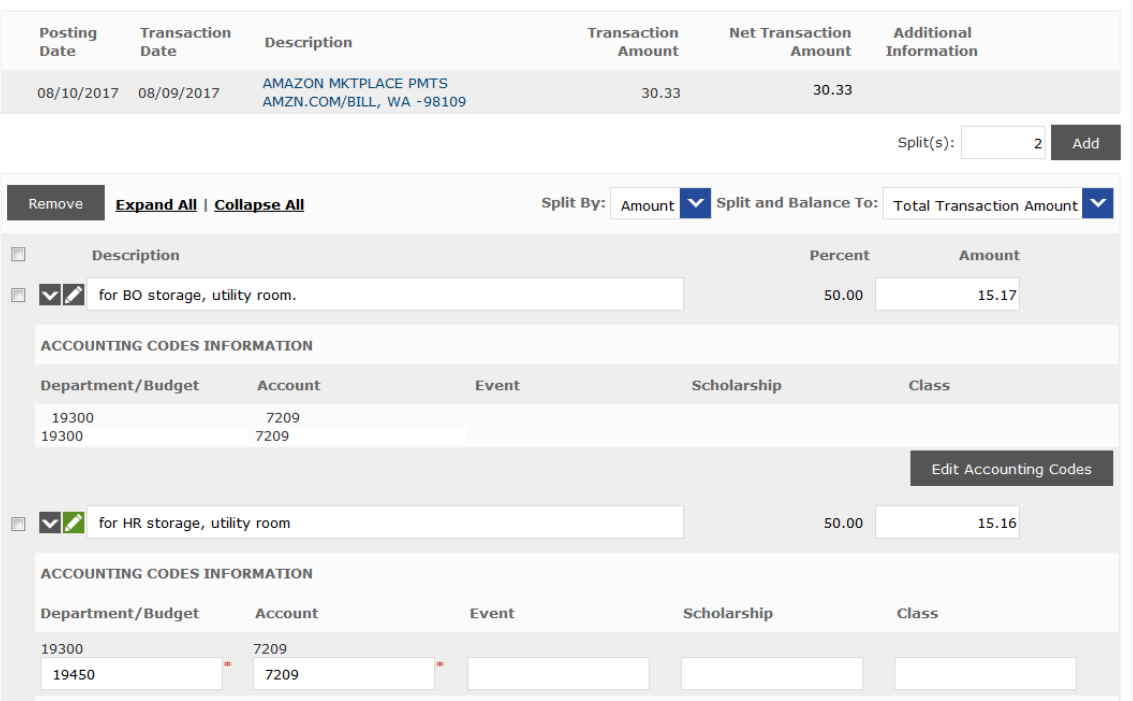
Sometimes it is necessary to make splits in one transaction.



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



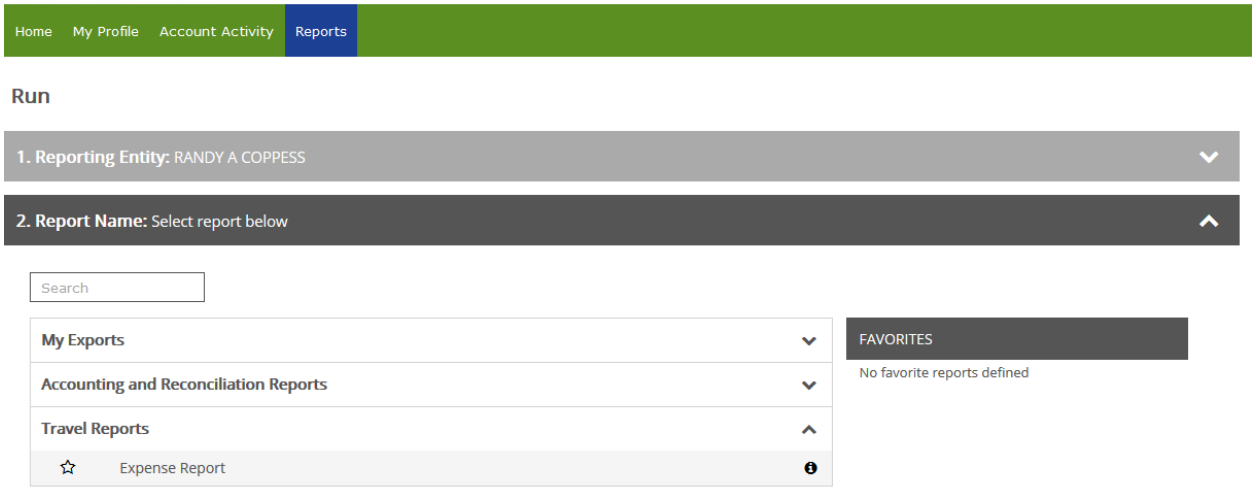
3.Enter your description in the description field. **note, this does not designate your budgets, this is just your business purpose description**



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)

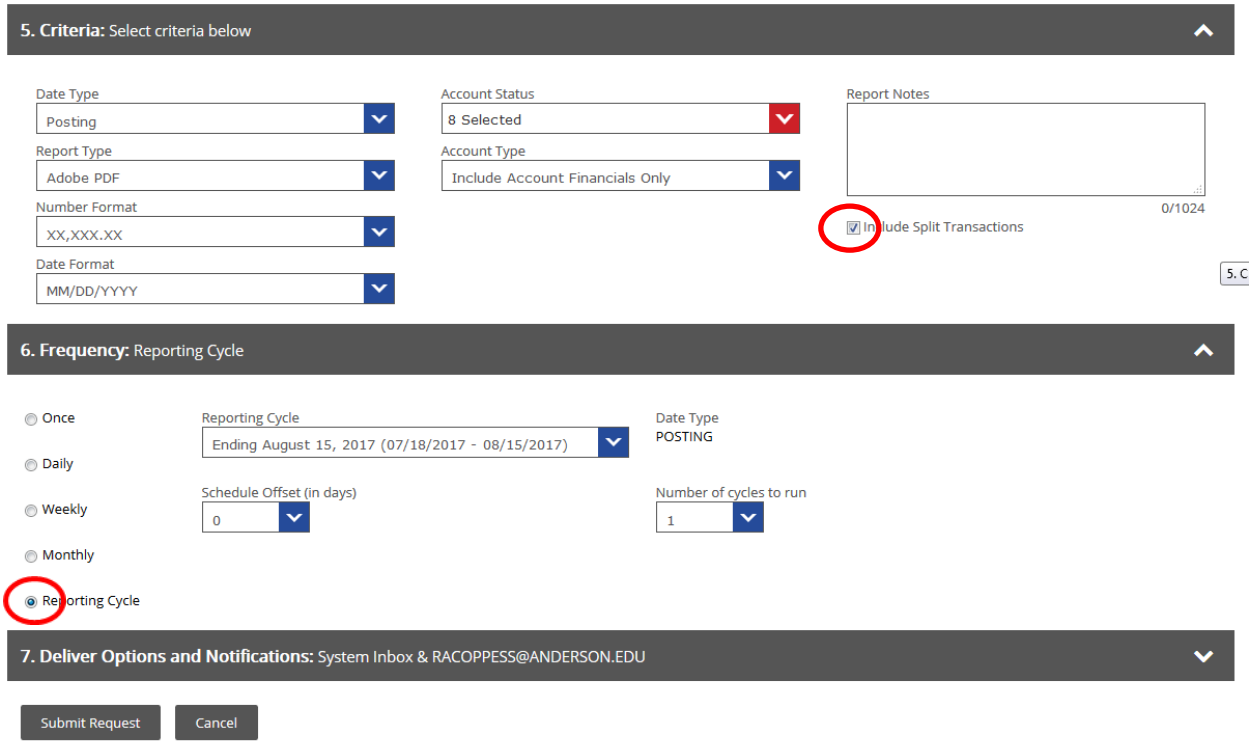
B. Create and print an expense report

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

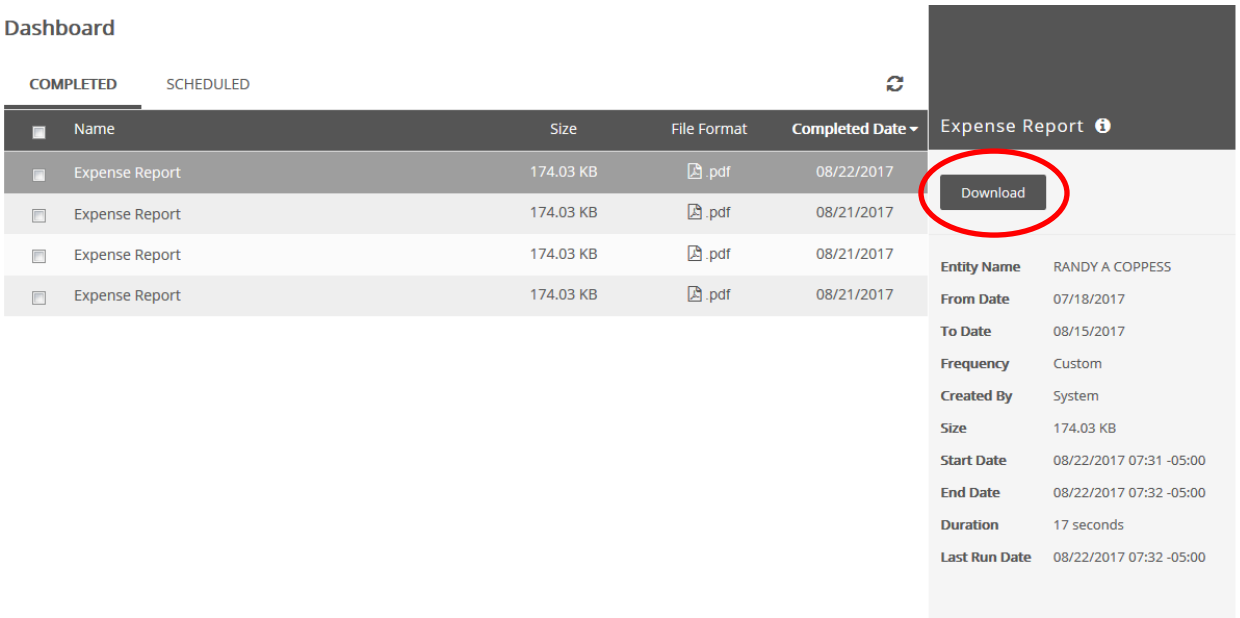


3. Then click on the band that says Expense Report
4. Everything should default correctly with the exception of #5 Criteria. Click on the down arrow for that, and click in the last box, Include Split Transactions.

5. 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.



6. Hit Submit Request button.
7. You should receive a green message bar that says Expense Report Scheduled Successfully.
8. 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.



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:

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