

PA STATE SYSTEM OF HIGHER EDUCATION

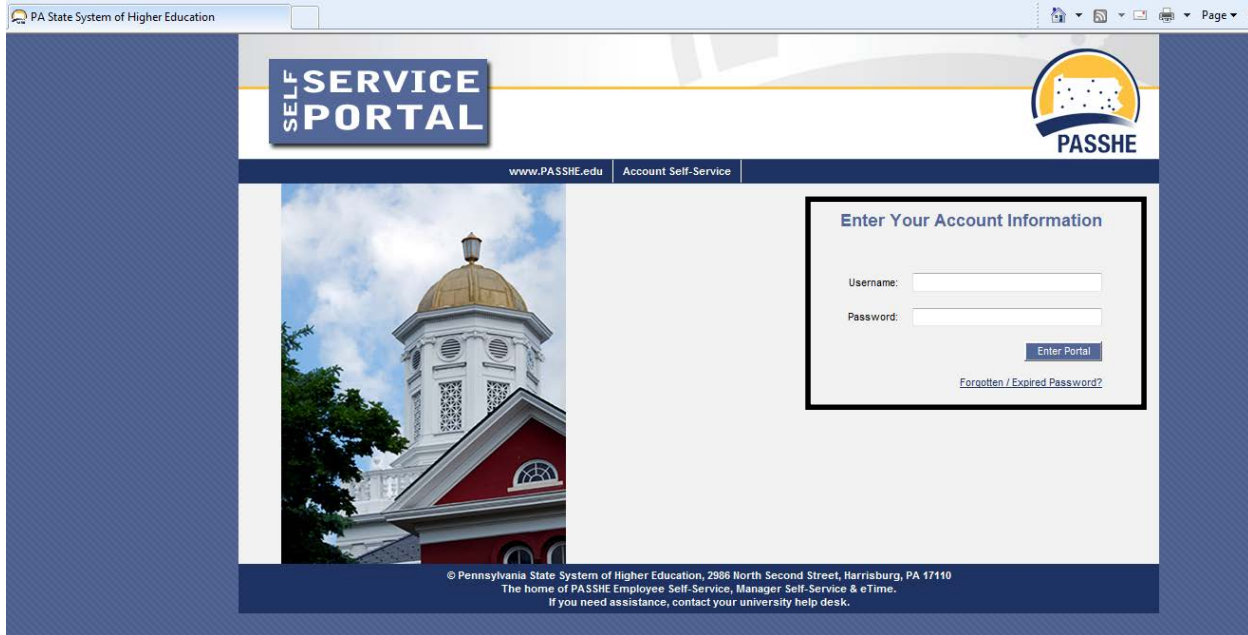
Shared Administrative System

TM – Travel Management

Create Travel Request

All Travel Requests will be entered by either the Traveler or Travel Assistant via the portal.

Log into the portal...



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Create Travel Request

From the ESS tab, click on either of the 2 provided Travel Management links.

SELF SERVICE PORTAL Pennsylvania State System of Higher Education
Welcome Nicole Richards

Home | **Employee Self-Service** | Manager Self-Service | SAS Internal Tools
Overview | Personal Information | Benefits | Leave & Time | Payroll | **Travel Management** | My First Days | Help Documents

Overview

Welcome Nicole to Employee Self-Service!

Areas of Employee Self-Service

Personal Information
Display your personal data, addresses, and bank information. Here you can also manage your ethnicity information.

Benefits
Display your benefits participation information and access the online benefits enrollment system.

Leave & Time
Within this section of Employee Self-Service you may view your leave balances and a complete record of all absences you have submitted to date. If you have an Employee Leave Request system, you may access it here as well.

Payroll
Access online copies of your printed pay statements, manage your W-4 withholding, view/change your W-2 election, and view your online W-2 form, if you have one.

Travel Management
This area of ESS provides employees with functions to create and manage travel requests and expense reports.

My First Days
For New Employees Only -- The My First Days application of ESS will allow new employees to the Pennsylvania State System of Higher Education to perform their HR personnel file. Here you can complete activities such as: setting up direct deposit, enrolling in your medical benefits and retirement plan(s), completing your direct deposit information, and other tasks. New employees should run this application within 30 days of your date of hire.

Help Documents
Here you will find all supporting Employee Self-Service (ESS) help documentation about every feature and tool of the ESS system. This document repository is intended to help you if you have a question about an ESS application's use.

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Create Travel Request

Click on one of the “Available Applications” to get started.

We’ll start from the “My Trips and Expenses” overview screen.

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Travel Management Overview

Employee Self-Service >> Travel Management

This page will provide you with information about each available Employee Self-Service (ESS) application for you to access in this sub-section of ESS. To access an application, simply click on overview page will be shown to the left of the ESS application that you can use to return to this page.

Available Applications

My Trips and Expenses

This page serves as the central management point for all your trips and expense reports. Here you can view, change, copy, or create new travel requests and/or expense reports.

[Create Travel Request](#)

You can use this quick link to create a travel request to be approved by your supervisor.

[Create Expense Report](#)

You can use this quick link to create an expense report for a trip without a previously submitted travel request.

[Unlock Employee Record](#)

Use this tool if you receive a message stating your employee record has been locked.

[My Employees](#)

Travel assistants can use this page to create travel requests and expense reports for other employees in their department.

**The “My Employees” link will only be available if the employee is a Travel Assistant.*

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Create Travel Request

This screen provides you with an overview of trips previously entered and allows you to start a new Travel Request or Expense Report.

Here, we'll create a new Travel Request.

My Trips and Expenses

Detailed Navigation

- Travel Management Overview

Related Links

- US Census Bureau
- County Cheat Sheet

My Trips and Expenses (Meyer [REDACTED])

All My Trips(0) All My Travel Requests(0) All My Expense Reports(0) Pending Exp. Reports(0)

View: [Standard View] **Create New Travel Request** Create New Expense Report

Start Date	End Date	Destination	Reason

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Create Travel Request

Create Travel Request main screen...

Create Travel Request

1 2 3
General Data Review and Send Completed

Roadmap ←

Employee Kokos [REDACTED]

◀ Previous Step Review ▶ Save Draft

▶ Calendar of Trips ▶ Attachments (0)

General Data

Start Date: * 00:00
End Date: * 00:00
Posting Date:

Destination

Trip Country: * Trip Region:
Destination: *

Additional Destinations: Enter Additional Destinations

Additional Information

Activity (Expenses): *

Reason: *

Estimated Costs: * USD Enter Estimated Costs

Comment:

Advances: Enter Advances

Cost Assignment: Change Cost Assignment

◀ Previous Step Review ▶ Save Draft

Required fields are marked with an asterisk (*).

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Create Travel Request

General Data

▶ Calendar of Trips
▶ Attachments (0)

General Data

Start Date: *

End Date: *

Posting Date:

- Enter the anticipated Start Date/Time and End Date/Time for the entire reimbursement period. If the trip involves multiple destinations, those will be entered in another section.
- Dates can be entered manually or selected by opening the Calendar of Trips and clicking on the beginning and end date.

▼ Calendar of Trips
▶ Attachments (0)

June 2013							July 2013							August 2013							September 2013							October 2013											
Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su					
22	27	28	29	30	31	1	2	27	1	2	3	4	5	6	7	31	29	30	31	1	2	3	4	35	26	27	28	29	30	31	1	40	30	1	2	3	4	5	6
23	3	4	5	6	7	8	9	28	8	9	10	11	12	13	14	32	5	6	7	8	9	10	11	36	2	3	4	5	6	7	8	41	7	8	9	10	11	12	13
24	10	11	12	13	14	15	16	29	15	16	17	18	19	20	21	33	12	13	14	15	16	17	18	37	9	10	11	12	13	14	15	42	14	15	16	17	18	19	20
25	17	18	19	20	21	22	23	30	22	23	24	25	26	27	28	34	19	20	21	22	23	24	25	38	16	17	18	19	20	21	22	43	21	22	23	24	25	26	27
26	24	25	26	27	28	29	30	31	29	30	31	1	2	3	4	35	26	27	28	29	30	31	1	39	23	24	25	26	27	28	29	44	28	29	30	31	1	2	3
27	1	2	3	4	5	6	7	32	5	6	7	8	9	10	11	36	2	3	4	5	6	7	8	40	30	1	2	3	4	5	6	45	4	5	6	7	8	9	10

- Time is entered in military format.
- Posting Date – This is the posting date for Funds Management and will default to the trip end date.

Destination

Destination

Trip Country: * Trip Region:

Destination: *

Additional Destinations:

- Enter the main destination or first destination if the trip involves multiple destinations.
- Trip Country – Select from the drop down list. USA will be the default.
- Trip Region – Enter manually if you know the region code or use the search feature.
- Destination – Free text

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- Additional Destinations – Click on “Enter Additional Destinations” to enter appropriate information
 - Note: All required fields must be populated on the main screen before you can enter additional destinations!

Additional Destinations

Add Additional Destination
Delete

<input type="checkbox"/>	Event in Itinerary	Date	Time	Destination	Country	Reason
	Start of Trip	07/15/2013	08:00		Standard Conus Rate, USA	
	Trip Destination	07/15/2013	08:00	Pittsburgh, PA	Pittsburgh, PA	Meeting
	Additional Destination	07/15/2013	08:01		Pittsburgh, PA	
<div style="margin-bottom: 5px;">Activity: <input type="text" value="General Travel"/></div> <div style="margin-bottom: 5px;">Trip Country: <input type="text" value="Standard Conus Rate, USA"/> Trip Region: <input type="text" value="PA/P3"/> <input type="checkbox"/> Pittsburgh, PA</div> <div style="display: flex; justify-content: space-between;"> Accept Accept and Add Additional Destination Delete </div>						
	End of Trip	07/17/2013	19:00		Standard Conus Rate, USA	

◀ Previous Step
Accept
Save Draft

- Additional Destination data initially defaults from the Main Destination. You must change the Date, Time, Destination and Reason fields. You may also need to change the Activity and Trip Region as well. Click on Accept to record your new entries. If everything looks correct, click on Accept again to return to the main screen.

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Additional Information

Additional Information

Activity (Expenses): *

Reason: *

Estimated Costs: * USD

Comment:

Advances:

Cost Assignment:

- Activity – Purpose of travel. Make a selection from the drop down list. The General Ledger (GL) account is determined based on the Activity selected here.

Additional Information

Activity (Expenses): *

Reason: *

Estimated Costs: *

Comment:

Advances:

Cost Assignment:

Athletic Recruiting & Scouting

Athletic Team Travel

General Travel

Human Resources Recruitment

Student Recruitment Travel

Student Travel

Teaching Travel

Training/Development Travel

- Reason – Free text

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Create Travel Request

- Estimated Costs – Enter details by clicking on “Enter Estimated Costs”
 - Populate the appropriate expense type category and click on “Calculate”
 - When everything looks correct, click on “Accept” to return to the main screen

◀ Previous Step **Accept** Save Draft

Estimated Costs		
Calculate		
Travel Mediums	Estimated Costs	Currency
Airfare	0.00	USD
Baggage Fee	0.00	USD
Business Meal (auth required)	0.00	USD
Conference Regist	0.00	USD
Gasoline	0.00	USD
Hotel	89.00	USD
Meals/Subsistence	91.00	USD
Mileage Reimb	0.00	USD
Other Miscellaneous Costs	0.00	USD
Parking	0.00	USD
Car rental	0.00	USD
Taxi, shuttle, public trans.	0.00	USD
Toll	0.00	USD
Train	0.00	USD
Z: Unfunded Travel Costs	0.00	USD
Sum	180.00	USD

◀ Previous Step **Accept** Save Draft

The system will automatically estimate the cost for lodging and meals based on your trip duration and trip location (trip region). You can override these amounts if necessary (minimum = \$.01).

- Comment – Free text

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- Advances – This section is for informational purposes only. Advances will be handled manually, outside of the SAP Travel Management system.
 - If advances are permitted at your university and you wish to record the Travel Advance amount, click on “Enter Advances”.
 - Populate the Amount column and click on Accept when finished.

Advances		
Seq. No.	Amount	Currency
001	0.00	United States Dollar

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- Cost Assignment – The cost assignment will default from your HR Master Data. If you wish to override the default , click on “Change Cost Assignment”
 - You may change the fields identified below.
 - Accounting Object selections include Cost Center, (Internal) Order, and WBS

Cost Assignment for Trip

Cost Assign (%)	Company Code	Business Area	Accounting Object	Accounting Object Value
100.00	State System of Higher Ed	Bloomsburg	Cost Center	011030201 - Budget Office

Cost Center: 1011030201 Budget Office

- Many options are available to search for a cost object including searching for previously used objects or creating a Personal Value List.
- Once you’ve entered the appropriate cost assignment info, click on Accept to return to the main screen.
- Note: If the distribution does not total 100%, the portion not distributed will be charged according your HR master data.

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Once all data has been entered to your satisfaction, click on either of the "Review" buttons.

◀ Previous Step **Review ▶** Save Draft

Check was successful

▶ Calendar of Trips ▶ Attachments (0)

General Data

Start Date: * 07/15/2013 08:00
End Date: * 07/17/2013 19:00

Destination

Trip Country: * Standard Conus Rate, USA Trip Region: PA/P3 Pittsburgh, PA
Destination: * Pittsburgh, PA
Additional Destinations: 07/16/2013 Indiana, PA **Enter Additional Destinations**

Additional Information

Activity (Expenses): * General Travel
Reason: * Meeting
Estimated Costs: * 370.00 USD **Enter Estimated Costs**
Comment:

Advances: 50.00 United States Dollar **Enter Advances**
Cost Assignment: 2 Assignments: 75.00 % Cost Center 1011030201 (Budget Office), Funds Center 101103 **Change Cost Assignment**

◀ Previous Step **Review ▶** Save Draft

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If all looks good on the below screen, you can either Save a Draft of the Travel Request or Save and Send it for Approval. Click on the appropriate radio button and then the Save button at the bottom of the screen (this button will change based on the radio button you select).

If you wish to display or print the request, click on the button Display Request Form.

Final Action

Save Draft I only want to save my travel request and send it later

Save and Send for Approval I want to save my travel request and send it now for further processing

I confirm that I have entered all data to the best of my knowledge

Summary

Total Individual Receipts	370.00 USD
Total Travel Expenses	370.00 USD
Amount Reimbursed	370.00 USD
Total Advances	- 50.00 USD
Amount Paid Out	320.00 USD
Estimated Costs	370.00 USD

Cost Assignment

370.00 USD Company Code SSHE (State System of Higher Ed), Business Area 10 (Bloomsburg), Cost Center 1011030201 (E

[Display Request Form](#)

[Previous Step](#) [Save and Send for Approval](#)

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Create Travel Request

The below screen will then appear acknowledging that the Travel Request was saved and provide the tracking number.

You have the option to display or print the request form again at this point. Please note the workflow approval log does not appear on the form until the Travel Request is Saved.

Create Travel Request

1 2 3
General Data Review and Send **Completed**

Employee Meyer: [REDACTED] Start Date 07/15/2013 End Date 07/17/2013

◀ Previous Step Save and Send for Approval

Travel request 1000000002 was saved ← [REDACTED]

100.00 % will be assigned acc. to trip costs assignment guidelines

Display Request Form

◀ Previous Step Save and Send for Approval

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This trip will now be listed on the “My Trips and Expenses” overview screen.

My Trips and Expenses (Meyer [REDACTED])

[All My Trips \(1\)](#) |
 [All My Travel Requests \(1\)](#) |
 [All My Expense Reports \(0\)](#) |
 [Pending Exp. Reports\(0\)](#)

[Change Query](#) |
 [Define New Query](#) |
 [Personalize](#)

View: [Standard View] | [Create New Travel Request](#) | [Create New Expense Report](#) | [Filter Settings](#)

Start Date	End Date	Destination	Reason	Recommended Actions	Alert	History
07/15/2013	07/17/2013	Pittsburgh, PA	Meeting	Change Travel Request		Display

Last Refresh 06/19/2013 15:35:31 EST [Refresh](#)

Details of Trip: Pittsburgh, PA (1000000002)

Travel Request

Approval Status: Request Recorded | Attachments: [Add](#)

[Display/Print](#) |
 [Change](#) |
 [Copy](#) |
 [Delete](#)

My Trips and Expenses (Meyer [REDACTED])

[All My Trips \(1\)](#) |
 [All My Travel Requests \(1\)](#) |
 [All My Expense Reports \(0\)](#) |
 [Pending Exp. Reports\(0\)](#)

[Change Query](#) |
 [Define New Query](#) |
 [Personalize](#)

View: [Standard View] | [Display/Print](#) | [Change](#) | [Copy](#) | [Delete](#) | [Create New Travel Request](#) | [Filter Settings](#)

Start Date	End Date	Destination	Reason	Processing Status	Approval Status	Attachments	Expense Report	Alert
07/15/2013	07/17/2013	Pittsburgh, PA	Meeting	Released for Approval	Request Recorded	Add	Create	

From here, you can Display/Print the Travel Request form at any time. The workflow approval log on the form will show you where your trip is in the approval process. You can also Change, Copy, or Delete the Travel Request, Add Attachments, Display the History, and Create the Expense Report from these screens.