

PA STATE SYSTEM OF HIGHER EDUCATION

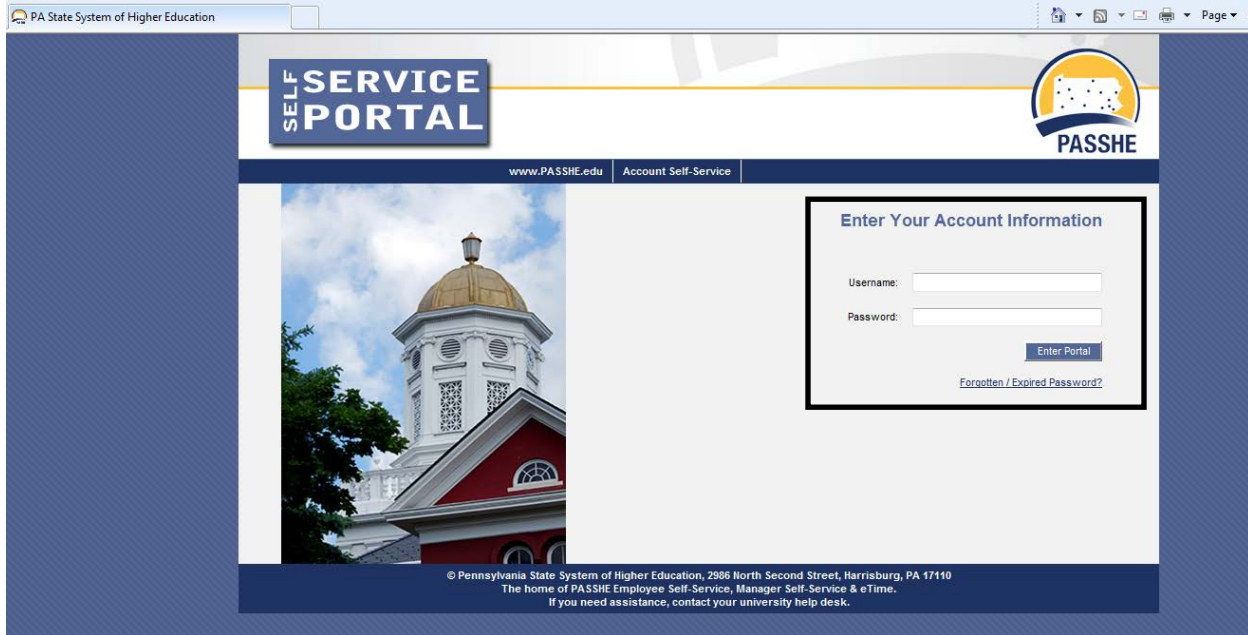
Shared Administrative System

TM – Travel Management

Create Travel Expense Report against a Request

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

Log into the portal...



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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 completing your emergency contact information. 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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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 Expense Report against a Request

This screen provides you with an overview of trips previously entered and allows you to create a new Travel Request or Expense Report, change existing Travel Requests or Expense Reports, and create a Travel Expense Report against a Request.

Under Recommended Actions, the system will prompt you to Create a Travel Expense Report against a Travel Request if the trip end date has passed.

Click on Create Travel Expense Report to get started.

My Trips and Expenses [REDACTED]

All My Trips (4) All My Travel Requests (2) All My Expense Reports(2) Pending Exp. Reports(2)

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

Start Date	End Date	Destination	Reason	Recommended Actions
06/10/2013	06/11/2013	Shippensburg, PA	Meeting	Change Travel Expense Report
06/24/2013	06/25/2013	Millersburg, PA	Meeting	Change Travel Request
06/03/2013	06/04/2013	Hbg	6/19 testing portal approval	Change Travel Expense Report
06/17/2013	06/18/2013	Atlanta, GA	Attend Conference	Create Travel Expense Report

Select a schema from the list and then click on Start.

Create Expense Report based on Travel Request (4500000011)

Employee Shaeffer [REDACTED]

[Start](#)

Schema Selection

Domestic - Overnight

International - Overnight


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Shared Administrative System

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Create Travel Expense Report against a Request

Alternatively, you can get started by clicking on Create Expense Report under Available Applications.



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The system will propose Travel Requests that are available for Expense Report creation. If you wish to create an Expense Report for one of the proposed requests, click on the line, select a schema and then click on start.

Create Expense Report

Employee Shaeffer, XXXXXXXXXX

Available Travel Requests / Plans

	Trip Number	Trip Begins On	Trip Ends On	Destination	Trip Country	Reason
<input type="checkbox"/>	4500000011	05/19/2014	05/20/2014	Pittsburgh, PA	US	NR: Attend conference
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

Schema Selection
 Domestic - Overnight
 International - Overnight
 Non-Overnight Travel

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The system will automatically populate all fields on the main screen from the Travel Request. You may override any field as necessary.

Create Expense Report based on Travel Request (4500000002)

1 2 3 4
General Data Enter Receipts Review and Send Completed

Employee [REDACTED] Schema Domestic trip

Previous Step Enter Receipts Save Draft

Calendar of Trips Attachments (0)

General Data

Start Date: * 06/17/2013 09:00
End Date: * 06/18/2013 19:00

Destination

Trip Country: * Standard Conus Rate, USA Trip Region: GA-AA Atlanta, GA
Destination: * Atlanta, GA
Additional Destinations: No destinations entered Enter Additional Destinations

Additional Information

Activity: * Training/Development Travel
Reason: * Attend Conference

Comment: [Text Area]

Advances: 0.00 United States Dollar Enter Advances
Cost Assignment: 100.00 % Cost Center 4511041600 (Budget Office), Funds Center 4511041600 (Budget C) Change Cost Assignment

Per Diems for Meals and Accommodations

Per Diem Reimbursement for Meals:

Mileage

Total Distance: 0 Mile Enter Mileage Details

Previous Step Enter Receipts Save Draft

Follow the directions for "Create Travel Expense Report" from this point forward.

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Note: In the Enter Receipts section, you must delete the line item for Estimated Costs that was pulled over from the Travel Request. The system will prompt you to do this. Highlight the line item and then click on Delete. This must be done before moving on to the Review & Send step.

Create Expense Report based on Travel Request (4500000002)

1 General Data 2 Enter Receipts 3 Review and Send 4 Completed

Employee [REDACTED] Schema Domestic trip Start Date 06/17/2013 End Date 06/18/2013

Previous Step Review Save Draft

! Trip has already taken place. Please delete expense type ESTM from 20130617

Receipts in This Expense Report

New Entry Copy Delete

No.	Status	Expense Type	Receipt Amount	Receipt Currency	Receipt Date	Amount	Paper Receipt
001		Estimated Cost	660.00	United States Dollar	06/17/2013	660.00	<input checked="" type="checkbox"/>

Description:

Comment:

Accept Accept and New Entry Change Cost Assignment Enter Itemization Check Copy Delete