

PA STATE SYSTEM OF HIGHER EDUCATION

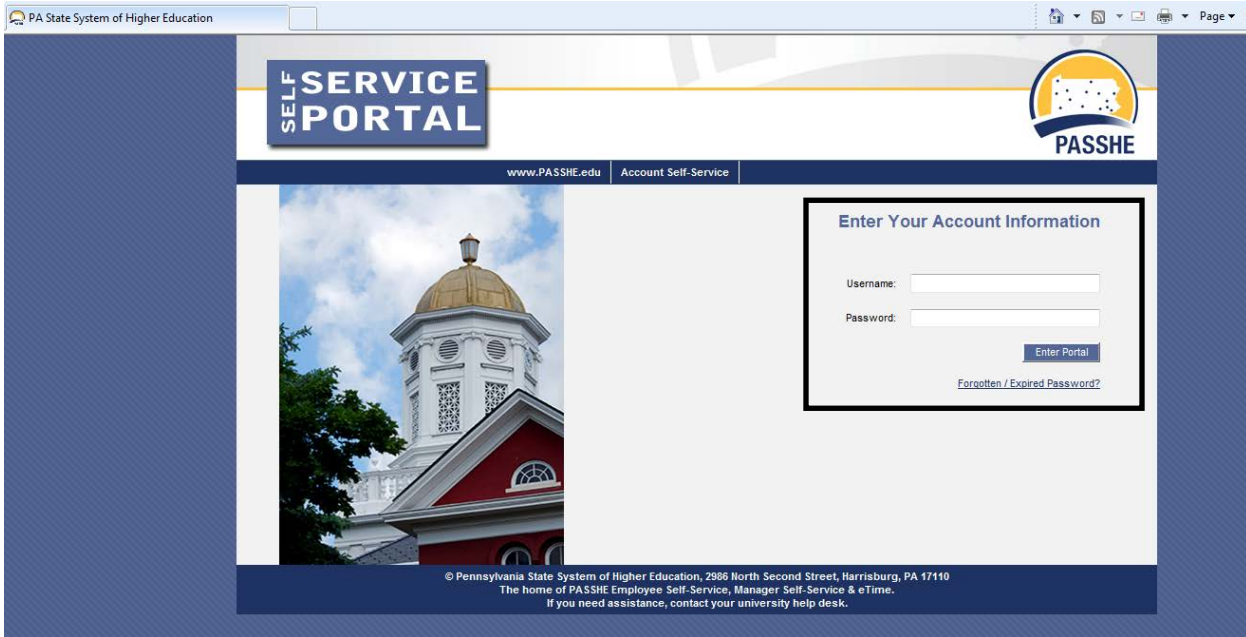
Shared Administrative System

TM – Travel Management

Travel Assistant

The Travel Assistant can create, change, and monitor travel requests and expense reports on behalf of other employees that have been assigned to them.

Log into the portal...



The screenshot shows a web browser window displaying the PASSHE Self-Service Portal. The browser's address bar shows "PA State System of Higher Education". The page features a blue header with the "SELF SERVICE PORTAL" logo on the left and the PASSHE logo on the right. Below the header, there is a navigation bar with "www.PASSHE.edu" and "Account Self-Service". The main content area is divided into two sections: a large image of a building with a golden dome on the left, and a login form on the right. The login form is titled "Enter Your Account Information" and contains two input fields for "Username:" and "Password:". Below the password field is a blue "Enter Portal" button and a link for "Forgotten / Expired Password?". At the bottom of the page, there is a copyright notice: "© Pennsylvania State System of Higher Education, 2986 North Second Street, Harrisburg, PA 17110. The home of PASSHE Employee Self-Service, Manager Self-Service & eTime. If you need assistance, contact your university help desk."

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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 direct deposit 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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Next, click on “My Employees.” This option will only be available to those employees assigned to the Travel Assistant role.

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

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.

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The next screen will list all employees that have been assigned to the Travel Assistant.

SELF SERVICE PORTAL

Pennsylvania State System of Higher Education

Welcome Maria Hernandez

Home

Employee Self-Service

Materials Management

Travel Management

My Employees

Detailed Navigation

- Travel Management Overview

Employee List

View: [Standard View] ⌵

Last Name (Surname)	First Name	Personnel No.	Office	Telephone No.	Cost Center Name	E-Mail
Silberman	Gerald	[REDACTED]			[REDACTED]	
Long	Kenneth	[REDACTED]			[REDACTED]	

Click on the employee you wish to work on and travel information for that employee will be displayed.

L

Welcome Maria Hernandez

[Log Out](#)

Materials Management

| His

Employee List

View: [Standard View] ⌵

Last Name (Surname)	First Name	Personnel No.	Office	Telephone No.	Cost Center Name	E-Mail
Silberman	Gerald	[REDACTED]			[REDACTED]	
Long	Kenneth	[REDACTED]			[REDACTED]	

Details of: Long , Kenneth

[Unlock](#)

Travel Requests(4)

Expense Reports(2)

[Change Query](#) [Define New C](#)

View: [Standard View] ⌵

[Display/Print](#) | [Change](#) | [Copy](#) | [Delete](#) | [Create New Travel Request](#) | [Copy to Other Employee](#)

Start Date	End Date	Destination	Reason	Processing Status	Approval Status	Attachments	Expense Report
06/24/2013	06/25/2013	Baltimore, MD	Acct Seminar	transferred to FI	Request Approved	Add	Create
07/11/2013	07/12/2013	New York City	Seminar - Entered by M. Hernandez	transferred to FI	Request Approved	Add	Create
07/16/2013	07/17/2013	dasfasdf	sdfasdf	Released for Approval	Request Recorded	Add	Create
07/08/2013	07/10/2013	Washington, D.C.	GASB Seminar	Released for Approval	Request Recorded	Add	Create

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Travel Assistant

In the lower portion of the screen, there are separate tabs for Travel Requests and Expense Reports.

To create a new Travel Request, click on the button.

Details of: Long, Kenneth

[Unlock](#)

Travel Requests (4) | Expense Reports (2)

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

View: [Standard View] | [Display/Print](#) | [Change](#) | [Copy](#) | [Delete](#) | **[Create New Travel Request](#)** | [Copy to Other Employee](#) | [Filter S](#)

Start Date	End Date	Destination	Reason	Processing Status	Approval Status	Attachments	Expense Report	Alert
06/24/2013	06/25/2013	Baltimore, MD	Acct Seminar	transferred to FI	Request Approved	Add	Create	
07/11/2013	07/12/2013	New York City	Seminar - Entered by M. Hernandez	transferred to FI	Request Approved	Add	Create	
07/16/2013	07/17/2013	dasfasdf	sdfasdf	Released for Approval	Request Recorded	Add	Create	
07/08/2013	07/10/2013	Washington, D.C.	GASB Seminar	Released for Approval	Request Recorded	Add	Create	

The Create Travel Request screen looks exactly the same whether you're creating one for yourself or another employee.

Create Travel Request

1 General Data | 2 Review and Send | 3 Completed

Employee Long, Kenneth

[Previous Step](#) | [Review](#) | [Save Draft](#)

[Calendar of Trips](#) | [Attachments \(0\)](#)

General Data

Start Date: *

End Date: *

Destination

Trip Country: * Standard Conus Rate, USA | Trip Region:

Destination: *

Additional Destinations: No destinations entered | [Enter Additional Destinations](#)

Additional Information

Activity (Expenses): *

Reason: *

Estimated Costs: * USD | [Enter Estimated Costs](#)

Comment:

Advances: | [Enter Advances](#)

Cost Assignment: | [Change Cost Assignment](#)

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Travel Assistant

To take action on any Travel Request previously entered, click on the appropriate row to access the various options.

Details of: Long , Kenneth

[Unlock](#)

Travel Requests (4) Expense Reports(2)

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

View: [Standard View] [Display/Print](#) [Change](#) [Copy](#) [Delete](#) [Create New Travel Request](#) [Copy to Other Employee](#) [Filter](#)

Start Date	End Date	Destination	Reason	Processing Status	Approval Status	Attachments	Expense Report
06/24/2013	06/25/2013	Baltimore, MD	Acct Seminar	transferred to FI	Request Approved	Add	Create
07/11/2013	07/12/2013	New York City	Seminar - Entered by M. Hernandez	transferred to FI	Request Approved	Add	Create
07/16/2013	07/17/2013	dasfasdf	sdfasdf	Released for Approval	Request Recorded	Add	Create
07/08/2013	07/10/2013	Washington, D.C.	GASB Seminar	Released for Approval	Request Recorded	Add	Create

The Expense Reports tab works in the same manner.


Details of: Long , Kenneth

[Unlock](#)

Travel Requests (4) Expense Reports (2)

[Change Query](#) [Define New Query](#) [Person](#)

View: [Standard View] [Display/Print](#) [Change](#) [Copy](#) [Delete](#) [Create New Expense Report](#) [Copy to Other Employee](#) [Filter](#) [Settin](#)

Start Date	End Date	Destination	Reason	Reimbursmt	Currency	Approval Status	Attachments	Alert
06/06/2013	06/07/2013	Hbg	6/19 test for approval routing	63.75	USD	Trip Completed	Add	
06/03/2013	06/05/2013	Hbg	Meeting	212.98	USD	Trip Approved	Add	

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There is one difference between entry by the Travel Assistant versus entry by the actual employee.

****The Travel Assistant can only Save a Draft of the Request/Expense Report; they cannot Save and Send for Approval.****

By default, “Save and Send for Approval” is selected on this screen. The travel assistant must click on the radio button for “Save Draft” and then the Save Draft button at the top or bottom of the screen.

Welcome Maria Hernandez

Materials Management

Change Travel Request (4500000001)

1 General Data 2 Review and Send 3 Completed

Employee Long, Kenneth Start Date 07/16/2013 End Date 07/17/2013

Previous Step Save Draft

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 Travel Expenses 1.00 USD

Estimated Costs 1.00 USD

Cost Assignment

1.00 USD Company Code SSHE (State System of Higher Ed), Business Area 45 (Kutztown), Cost Center 4511041000 (AVP A

Display Request Form

Previous Step Save Draft

Upon notification from the travel assistant, the actual traveler must then access this trip (in change mode), review it, and then “Save and Send for Approval.”
