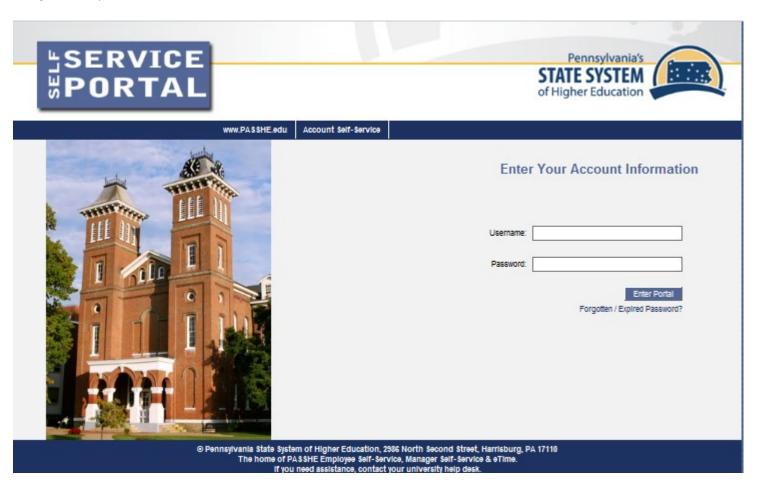
Shared Administrative System TM – Travel Management Create Travel Request

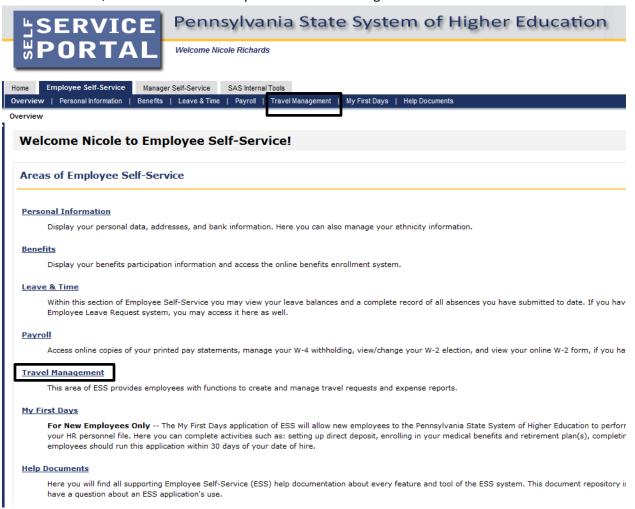
All Travel Requests will be entered by either the Traveler or Travel Assistant via the portal.

Log into the portal...



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

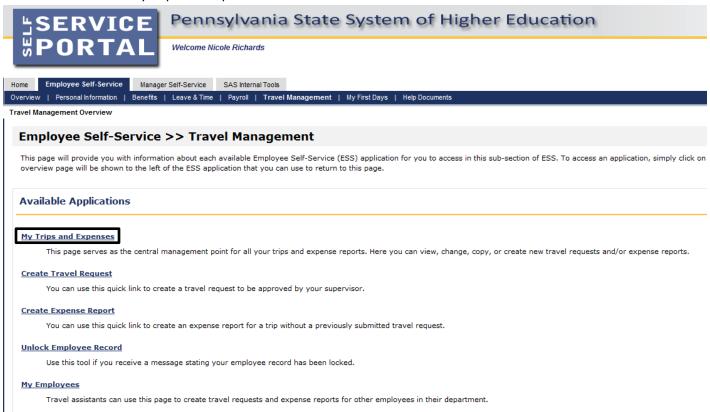


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Click on one of the "Available Applications" to get started.

We'll start from the "My Trips and Expenses" overview screen.



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

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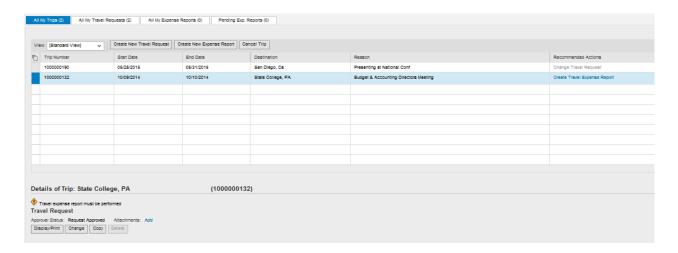
TM – Travel Management Create Travel Request

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

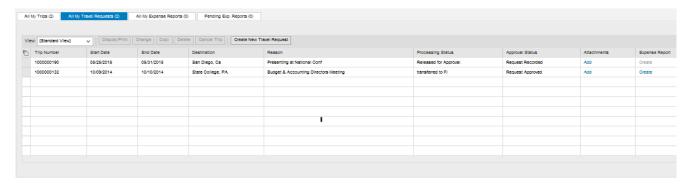
My Trips and Expenses (Halye , Audra L, 000				
All My Trips (1)	All My Travel Requests (1)	All My Expense Reports (0)	Pending Exp. Reports (0)	

Four tabs are available on this page.

• All My Trips – will list all of your trips and the status of each, whether requests not yet approved or completed trips. If travel has been completed, a link to "Create Travel Expense Report" is provided. From this screen you may access each trip to display/print, change or copy



• All My Travel Requests – includes all travel requests past and future (will not include trips for which there was no request submitted and only had a TER). Here you can display, add attachments, and modify your requests. Travel requests past the travel date will include a "create" link for expense report completion.



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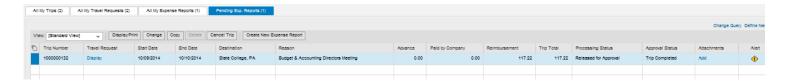
TM – Travel Management

Create Travel Request

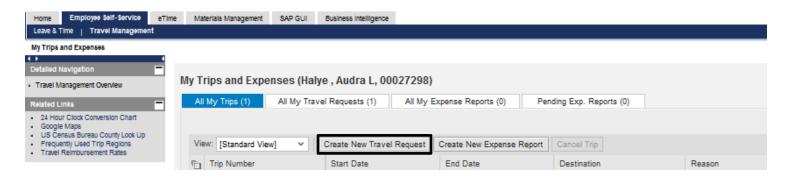
All My Expense Reports – all expense reports started or completed (will include those associated with a travel request). Here you can display, print or modify the document.



Pending Expense Reports – will list expense reports not yet closed out (e.g., waiting for approval)



Here, we'll create a new Travel Request.



Click on "Create New Travel Request"

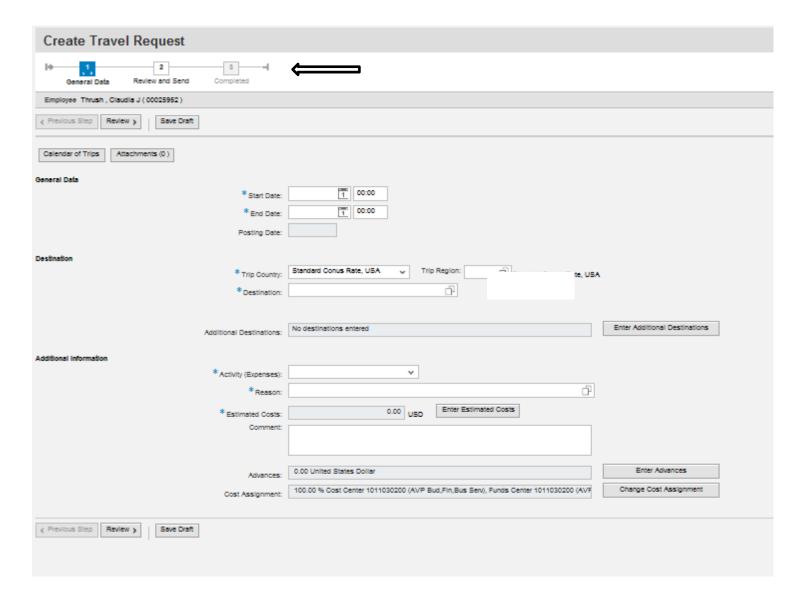
Create Travel Request BU

Shared Administrative System TM – Travel Management

Create Travel Request

Create Travel Request main screen...

Required fields are marked with an asterisk (*).

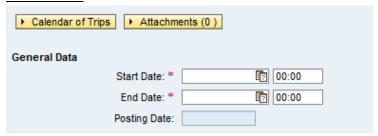


Shared Administrative System

TM – Travel Management

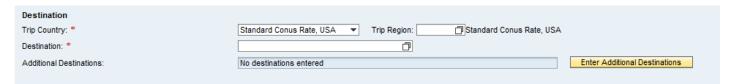
Create Travel Request

General Data



- 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.
- Time is entered in military format.
- Posting Date no entry needed. This is the posting date for Funds Management and will default to the trip end date.

Destination



- 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. (* see below)
- Destination Free text enter facility visiting or location of conference, etc.

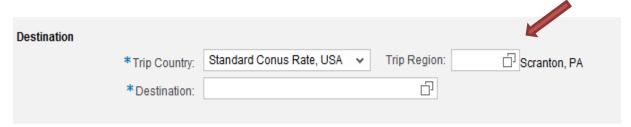
Shared Administrative System

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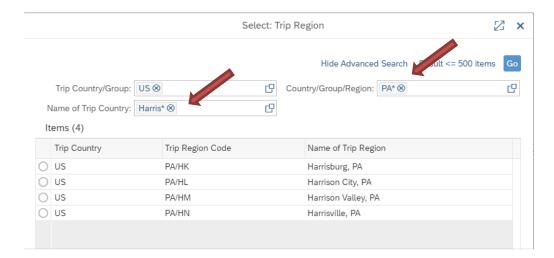
Create Travel Request

Search Feature

• To utilize the search feature , click



- The following will appear.
- Enter parameters exactly as listed:
 - Trip Country/Group will default to US (change if needed)
 - Country/Group/Region enter two letter state abbreviation in caps with an asterisk after it (PA*)
 - Name of Trip Country this is your city; enter as many or few letters as you wish, capitalize
 the first letter only, use an asterisk (Harris*)
 - If your city is not listed, you will need to use the county name
 - NOTE: it is important to use caps and "*" where indicated or the filter will not work as desired
- Click "GO".



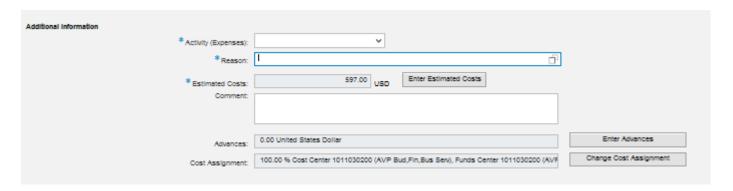
Shared Administrative System

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Create Travel Request

- Your search results will appear below
- Double click on the desired location to select and return to the main screen In this example, Harrisburg was chosen

Additional Information



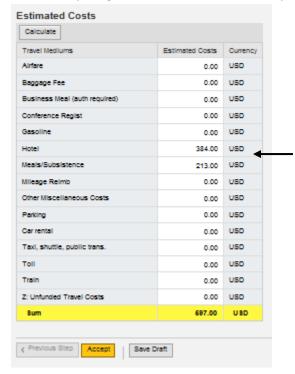
- Activity Purpose of travel. Make a selection from the drop down list. The General Ledger (GL)
 account (Commitment Item) is determined based on the Activity selected here.
 - Note that general travel is not used unless you are specifically instructed to do so



• Reason – Provide reason for travel.

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



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.

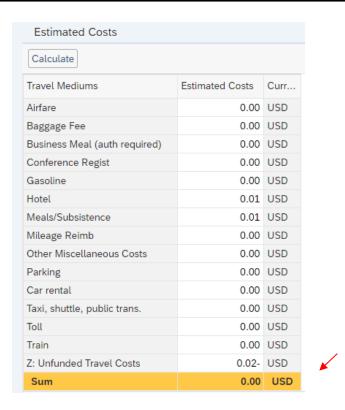
(minimum = \$.01)

- Meals will need to be reduced for any meals provided at conference/training/meeting (Use link in Navigation tool bar <u>See – Subsistence Calculator</u> (located on ESS Travel Management tab) to calculate the reduction)
- If no reimbursement will be requested and your Travel Request is For Insurance Purposes Only, you should use \$01 for meals/subsistence and adjust the total to zero by entering a negative amount in the "unfunded travel costs" field

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Create Travel Request





- Purpose of Travel;
- Provisions for Classes;
- Passengers;
- Details/Justifications for Expenses;
- Note: Information from websites, emails and word documents can be attached for additional information.
- Advances N/A

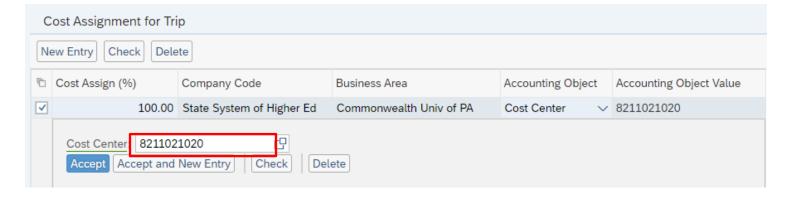
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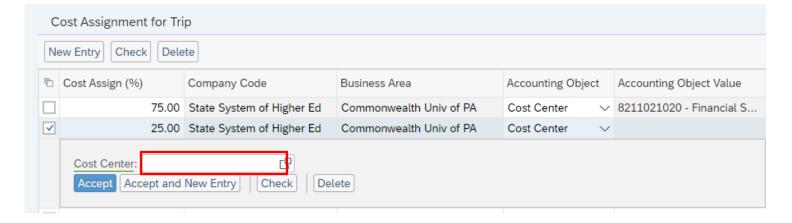
Create Travel Request

- Cost Assignment The cost assignment will default from your HR Master Data. If you wish to override the
 default, click on "Change Cost Assignment";
 - o Enter the applicable cost center where indicated below



o Cost Assign (%) allows the traveler to distribute costs by percentage among several Cost Centers

For Example: If 75% of your reimbursement is funded from Cost Center 1011030201 and 25% of your reimbursement is funded from Cost Center 1011030202 you would change the 100% to 75% and enter the new cost center in the Cost Center box, then click Accept and New Entry, you will notice the remaining 25% appears you can then enter the corresponding cost center for the remaining percentage and click Accept.



- You may search for a previously used cost center
- o 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.

Create Travel Request

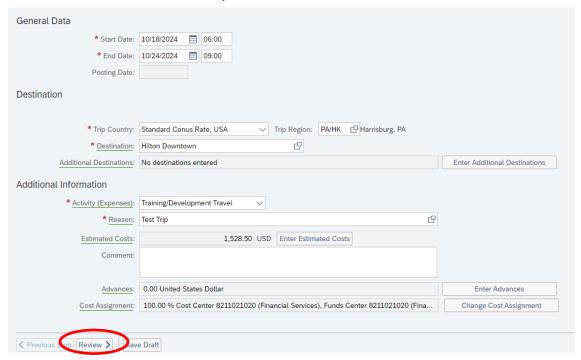
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Create Travel Request

Once all data has been entered to your satisfaction, click on "Review"



If all looks good on the below screen, you can **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).

NOTE – only the traveler may Save and Send for Approval; a travel assistant may only save a draft

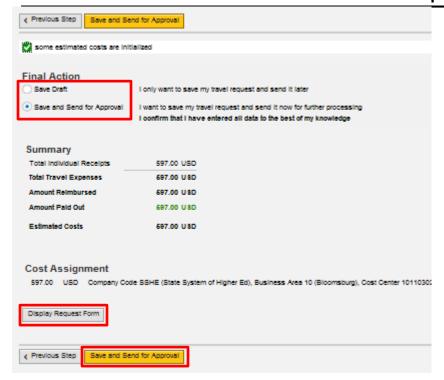
If you wish to display or print the request, click on the button Display Request Form.

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Create Travel Request



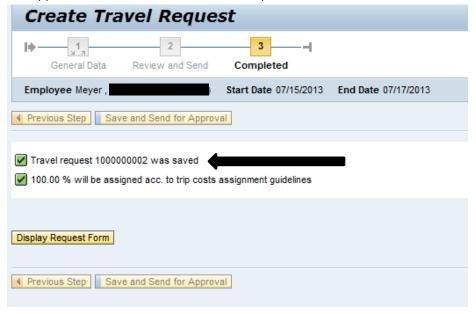
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The below screen will then appear acknowledging that the Travel Request was saved and provide the Trip Number for tracking and Enterprise (if necessary).

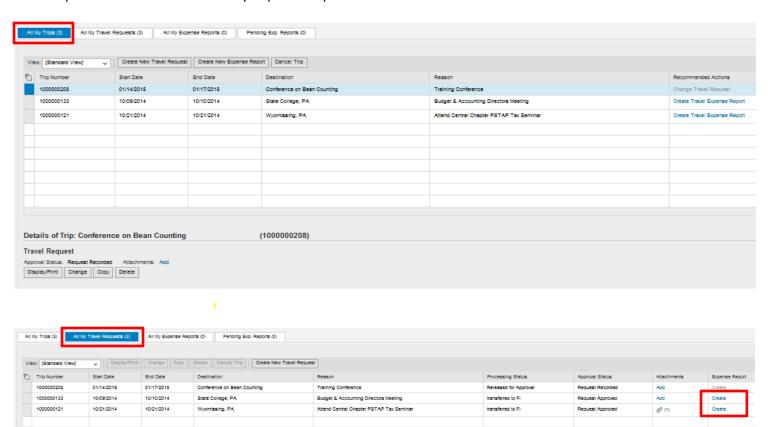
You have the option to display or print the request form again at this point. Please note the workflow approval log does not appear on the form until the Travel Request is Saved.



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



Note that completed trips listed will prompt for creation of an expense report

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.