

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...

The screenshot shows the login interface for the PA State System of Higher Education Self-Service Portal. At the top left is a blue box with the text "SELF SERVICE PORTAL". To the right is the logo for "Pennsylvania's STATE SYSTEM of Higher Education" featuring a map of Pennsylvania. Below the logo is a navigation bar with "www.PA\$SHE.edu" and "Account Self-Service". The main content area is titled "Enter Your Account Information" and contains two input fields: "Username:" and "Password:". Below these fields is a blue "Enter Portal" button and a link for "Forgotten / Expired Password?". On the left side of the page is a photograph of a large, ornate brick building with two prominent towers. At the bottom of the page is a dark blue footer with white text: "© Pennsylvania State System of Higher Education, 2385 North Second Street, Harrisburg, PA 17110. The home of PA\$SHE Employee Self-Service, Manager Self-Service & eTime. If you need assistance, contact your university help desk."

PA STATE SYSTEM OF HIGHER EDUCATION

Shared Administrative System

TM – Travel Management

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 more. 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.

PA STATE SYSTEM OF HIGHER EDUCATION

Shared Administrative System

TM – Travel Management

Create Travel Request

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

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

The screenshot displays the Pennsylvania State System of Higher Education Self-Service Portal. The header includes the 'SELF SERVICE PORTAL' logo and the user's name, 'Welcome Nicole Richards'. A navigation menu at the top lists 'Home', 'Employee Self-Service', 'Manager Self-Service', and 'SAS Internal Tools'. Below this, a secondary menu lists 'Overview', 'Personal Information', 'Benefits', 'Leave & Time', 'Payroll', 'Travel Management', 'My First Days', and 'Help Documents'. The main content area is titled 'Travel Management Overview' and features a sub-section 'Employee Self-Service >> Travel Management'. A paragraph explains that this page provides information about available Employee Self-Service (ESS) applications. Below this, a section titled 'Available Applications' lists several options: 'My Trips and Expenses' (highlighted with a red box), 'Create Travel Request', 'Create Expense Report', 'Unlock Employee Record', and 'My Employees'. Each option includes a brief description of its function.

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

PA STATE SYSTEM OF HIGHER EDUCATION

Shared Administrative System

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 (Halys, Audra L, 0000000000)

[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

The screenshot shows the 'All My Trips' tab selected. The table below lists the trips:

Trip Number	Start Date	End Date	Destination	Reason	Recommended Actions
1000000190	09/25/2015	09/31/2015	San Diego, Ca	Presenting at National Conf	Change Travel Request
1000000132	10/09/2014	10/10/2014	State College, PA	Budget & Accounting Directors Meeting	Create Travel Expense Report

Below the table, the details for trip 1000000132 are shown:

Details of Trip: State College, PA (1000000132)

Travel expense report must be performed

Travel Request

Approval Status: Request Approved Attachments: Add

Display/Print Change Copy Delete

- 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.

The screenshot shows the 'All My Travel Requests' tab selected. The table below lists the requests:

Trip Number	Start Date	End Date	Destination	Reason	Processing Status	Approval Status	Attachments	Expense Report
1000000190	09/25/2015	09/31/2015	San Diego, Ca	Presenting at National Conf	Released for Approval	Request Recorded	Add	Create
1000000132	10/09/2014	10/10/2014	State College, PA	Budget & Accounting Directors Meeting	transferred to FI	Request Approved	Add	Create

PA STATE SYSTEM OF HIGHER EDUCATION

Shared Administrative System

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.

Trip Number	Travel Request	Start Date	End Date	Destination	Reason	Advance	Paid by Company	Reimbursement	Trip Total	Processing Status	Approval Status	Attachments	Alert
1000000132	Display	10/09/2014	10/10/2014	State College, PA	Budget & Accounting Directors Meeting	0.00	0.00	117.22	117.22	Released for Approval	Trip Completed	Add	

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

Trip Number	Travel Request	Start Date	End Date	Destination	Reason	Advance	Paid by Company	Reimbursement	Trip Total	Processing Status	Approval Status	Attachments	Alert
1000000132	Display	10/09/2014	10/10/2014	State College, PA	Budget & Accounting Directors Meeting	0.00	0.00	117.22	117.22	Released for Approval	Trip Completed	Add	

Here, we'll create a new Travel Request.

Home | **Employee Self-Service** | eTime | Materials Management | SAP GUI | Business Intelligence

Leave & Time | Travel Management

My Trips and Expenses

Detailed Navigation

- Travel Management Overview

Related Links

- 24 Hour Clock Conversion Chart
- Google Maps
- US Census Bureau County Look Up
- Frequently Used Trip Regions
- Travel Reimbursement Rates

My Trips and Expenses (Halye, Audra L, 00027298)

All My Trips (1) | All My Travel Requests (1) | All My Expense Reports (0) | Pending Exp. Reports (0)

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

Trip Number	Start Date	End Date	Destination	Reason
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Click on “Create New Travel Request”

PA STATE SYSTEM OF HIGHER EDUCATION

Shared Administrative System

TM – Travel Management

Create Travel Request

Create Travel Request main screen...

Required fields are marked with an asterisk (*).

Create Travel Request

1 General Data 2 Review and Send 3 Completed ←

Employee: Thrush, Claudia J (00025952)

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: Standard Conus Rate, USA Trip Region: [] te, USA
* Destination: []

Additional Destinations: No destinations entered Enter Additional Destinations

Additional Information

* Activity (Expenses): []
* Reason: []
* Estimated Costs: 0.00 USD Enter Estimated Costs
Comment: []
Advances: 0.00 United States Dollar Enter Advances
Cost Assignment: 100.00 % Cost Center 1011030200 (AVP Bud,Fin,Bus Serv), Funds Center 1011030200 (AVP) Change Cost Assignment

Previous Step Review Save Draft

PA STATE SYSTEM OF HIGHER EDUCATION

Shared Administrative System

TM – Travel Management

Create Travel Request

General Data

▶ Calendar of Trips ▶ Attachments (0)

General Data

Start Date: * 00:00

End Date: * 00:00

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.
- 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

Destination

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

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


PA STATE SYSTEM OF HIGHER EDUCATION

Shared Administrative System


TM – Travel Management


Create Travel Request


Search Feature

- To utilize the search feature, click 



Destination


*Trip Country: Trip Region: 



*Destination: 




- 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".

Select: Trip Region  



Hide Advanced Search  Result <= 500 items

Trip Country/Group:  Country/Group/Region: 

Name of Trip Country: 

Items (4)

	Trip Country	Trip Region Code	Name of Trip Region
<input type="radio"/>	US	PA/HK	Harrisburg, PA
<input type="radio"/>	US	PA/HL	Harrison City, PA
<input type="radio"/>	US	PA/HM	Harrison Valley, PA
<input type="radio"/>	US	PA/HN	Harrisville, PA



PA STATE SYSTEM OF HIGHER EDUCATION

Shared Administrative System

TM – Travel Management

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

The screenshot shows the 'Additional Information' form with the following fields and values:

- * Activity (Expenses): [Empty dropdown]
- * Reason: [Text input with 'I' and a copy icon]
- * Estimated Costs: [Text input with '597.00' and 'USD', and an 'Enter Estimated Costs' button]
- Comment: [Text area]
- Advances: [Text input with '0.00 United States Dollar' and an 'Enter Advances' button]
- Cost Assignment: [Text input with '100.00 % Cost Center 1011030200 (AVP Bud,Fin,Bus Serv), Funds Center 1011030200 (AVP' and a 'Change Cost Assignment' button]

- 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

The screenshot shows the 'Additional Information' form with the following fields and values:

- * Activity (Expenses): [Dropdown menu with 'Administrative Travel' selected]
- * Reason: [Text input with a copy icon]
- * Estimated Costs: [Text input with '204.88' and 'USD', and an 'Enter Estimated Costs' button]
- Comment: [Text area]
- Advances: [Text input with '0.00 United States Dollar' and an 'Enter Advances' button]
- Cost Assignment: [Text input with '100.00 % Cost Center 1011030202 (Fin & Bus Services), Funds Center 1011030202 (' and a 'Change Cost Assignment' button]

- Reason – Provide reason for travel.

PA STATE SYSTEM OF HIGHER EDUCATION
Shared Administrative System
TM – Travel Management
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

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	384.00	USD
Meals/Subsistence	213.00	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	697.00	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)

- Meals will need to be reduced for any meals provided at conference/training/meeting (Use link in Navigation tool bar [See – Subsistence Calculator](#) (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

PA STATE SYSTEM OF HIGHER EDUCATION
Shared Administrative System
TM – Travel Management
Create Travel Request

Estimated Costs		
<input type="button" value="Calculate"/>		
Travel Mediums	Estimated Costs	Curr...
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	0.01	USD
Meals/Subsistence	0.01	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	0.02-	USD
Sum	0.00	USD



- **Comment – Provide the following relevant information:**
 - 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**

PA STATE SYSTEM OF HIGHER EDUCATION

Shared Administrative System

TM – Travel Management

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”;
 - Enter the applicable cost center where indicated below

Cost Assignment for Trip

	Cost Assign (%)	Company Code	Business Area	Accounting Object	Accounting Object Value
<input checked="" type="checkbox"/>	100.00	State System of Higher Ed	Commonwealth Univ of PA	Cost Center	8211021020

Cost Center: 8211021020



- 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.

Cost Assignment for Trip

	Cost Assign (%)	Company Code	Business Area	Accounting Object	Accounting Object Value
<input type="checkbox"/>	75.00	State System of Higher Ed	Commonwealth Univ of PA	Cost Center	8211021020 - Financial S...
<input checked="" type="checkbox"/>	25.00	State System of Higher Ed	Commonwealth Univ of PA	Cost Center	

Cost Center:

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

PA STATE SYSTEM OF HIGHER EDUCATION

Shared Administrative System

TM – Travel Management

Create Travel Request

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

General Data

* Start Date: 10/18/2024 06:00
* End Date: 10/24/2024 09:00
Posting Date:

Destination

* Trip Country: Standard Conus Rate, USA Trip Region: PA/HK Harrisburg, PA
* Destination: Hilton Downtown
Additional Destinations: No destinations entered Enter Additional Destinations

Additional Information

* Activity (Expenses): Training/Development Travel
* Reason: Test Trip
Estimated Costs: 1,528.50 USD Enter Estimated Costs
Comment:
Advances: 0.00 United States Dollar Enter Advances
Cost Assignment: 100.00 % Cost Center 8211021020 (Financial Services), Funds Center 8211021020 (Fina... Change Cost Assignment

< Previous **Review** Save Draft


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.

PA STATE SYSTEM OF HIGHER EDUCATION
Shared Administrative System
TM – Travel Management
Create Travel Request

← Previous Step **Save and Send for Approval**

 some estimated costs are initialized

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	597.00 USD
Total Travel Expenses	697.00 USD
Amount Reimbursed	697.00 USD
Amount Paid Out	697.00 USD
Estimated Costs	697.00 USD

Cost Assignment

597.00 USD Company Code SSHE (State System of Higher Ed), Business Area 10 (Bloomsburg), Cost Center 1011030

Display Request Form

← Previous Step **Save and Send for Approval**

PA STATE SYSTEM OF HIGHER EDUCATION
Shared Administrative System
TM – Travel Management
Create Travel Request

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.

Create Travel Request

1 General Data 2 Review and Send 3 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

PA STATE SYSTEM OF HIGHER EDUCATION

Shared Administrative System

TM – Travel Management

Create Travel Request

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

[All My Trips \(3\)](#) | [All My Travel Requests \(3\)](#) | [All My Expense Reports \(0\)](#) | [Pending Exp. Reports \(0\)](#)

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

Trip Number	Start Date	End Date	Destination	Reason	Recommended Actions
1000000208	01/14/2015	01/17/2015	Conference on Bean Counting	Training Conference	Change Travel Request
1000000133	10/09/2014	10/10/2014	State College, PA	Budget & Accounting Directors Meeting	Create Travel Expense Report
1000000121	10/21/2014	10/21/2014	Wyomissing, PA	Attend Central Chapter PSTAP Tax Seminar	Create Travel Expense Report

Details of Trip: Conference on Bean Counting (1000000208)

Travel Request
 Approval Status: [Request Recorded](#) | Attachments: [Add](#)
[Display/Print](#) | [Change](#) | [Copy](#) | [Delete](#)

[All My Trips \(3\)](#) | [All My Travel Requests \(3\)](#) | [All My Expense Reports \(0\)](#) | [Pending Exp. Reports \(0\)](#)

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

Trip Number	Start Date	End Date	Destination	Reason	Processing Status	Approval Status	Attachments	Expense Report
1000000208	01/14/2015	01/17/2015	Conference on Bean Counting	Training Conference	Released for Approval	Request Recorded	Add	Create
1000000133	10/09/2014	10/10/2014	State College, PA	Budget & Accounting Directors Meeting	transferred to FI	Request Approved	Add	Create
1000000121	10/21/2014	10/21/2014	Wyomissing, PA	Attend Central Chapter PSTAP Tax Seminar	transferred to FI	Request Approved	@ (1)	Create

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.