

# PA STATE SYSTEM OF HIGHER EDUCATION

## Shared Administrative System

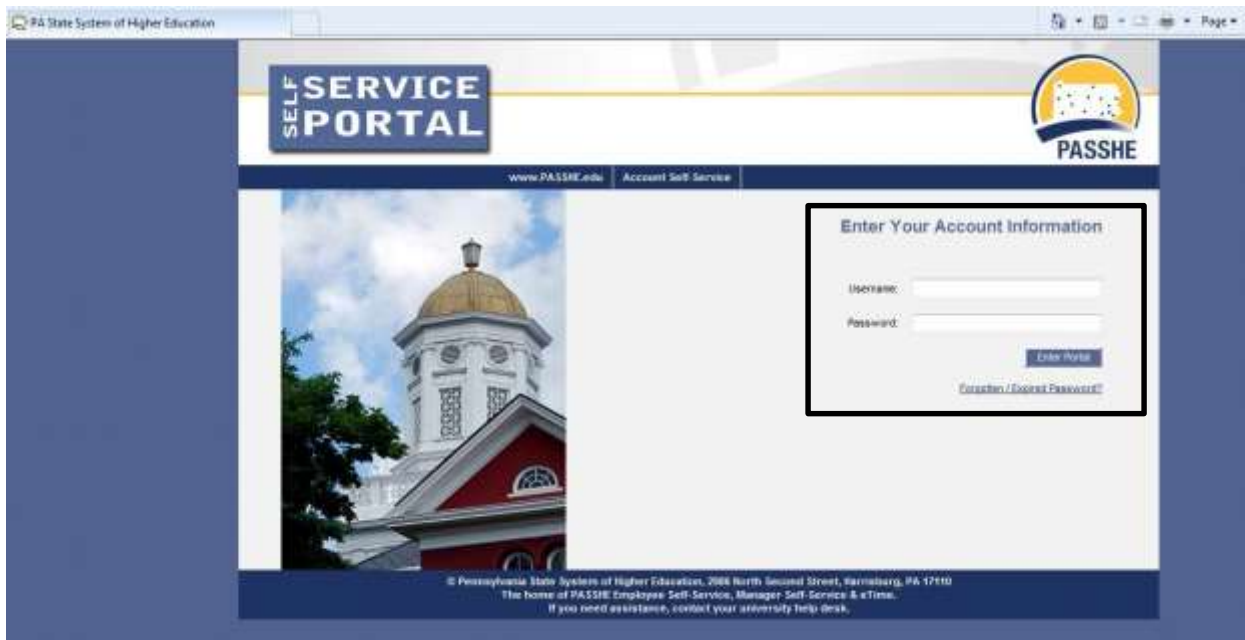
### TM – Travel Management

#### 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...



# PA STATE SYSTEM OF HIGHER EDUCATION

## Shared Administrative System

### TM – Travel Management

#### Travel Assistant

---

From the ESS tab, click on the Travel Management link.

**SELF SERVICE PORTAL**

Welcome Danielle Peters  
Last Logon: Wed, 01/21/2015 11:27:14

Home **Employee Self-Service** Manager Self-Service eTime Business Intelligence

Leave & Time | Travel Management

Leave & Time Overview

### Employee Self-Service >> Leave & Time

This page will provide you with information about each available Employee Self-Service (ESS) application for you to use. A link to this sub-sections overview page will be shown to the new page with the ESS application you have chosen.

#### Available Applications

- Record Working Time**  
Enables employees to record their working times and assign these to a project, order, or other SAP application objects.
- Display Leave Balances**  
Display your leave types and their balances.
- Display Absences**  
Display a listing of the days you have taken leave and days submitted for in the future.
- Employee Leave Request**  
Employees can enter new leave requests and view the status of previous requests.

# PA STATE SYSTEM OF HIGHER EDUCATION

## Shared Administrative System

### TM – Travel Management

#### Travel Assistant

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.

# PA STATE SYSTEM OF HIGHER EDUCATION

## Shared Administrative System

### TM – Travel Management

#### Travel Assistant

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

The screenshot shows the 'SELF SERVICE PORTAL' for the Pennsylvania State System of Higher Education. The user is logged in as Maria Hernandez. The navigation menu includes 'Home', 'Employee Self-Service', and 'Materials Management'. The 'Travel Management' section is active, showing 'My Employees' and a 'Detailed Navigation' sidebar with 'Travel Management Overview'. The main area displays an 'Employee List' table with columns for Last Name (Surname), First Name, Personnel No., Office, Telephone No., Cost Center Name, and E-Mail. Two employees are listed: Silberman, Gerald and Long, Kenneth. The Personnel No. and Cost Center Name for both are redacted with black boxes.

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

The screenshot shows the 'Details of: Long, Kenneth' screen. At the top, there is a 'Welcome Maria Hernandez' message and a 'Log Out' link. The 'Materials Management' section is active. The 'Employee List' table is shown with the row for 'Long, Kenneth' highlighted in orange. Below the table, there is an 'Unlock' button. The 'Travel Requests(4)' and 'Expense Reports(2)' tabs are visible. The 'Travel Requests' table is displayed with columns for Start Date, End Date, Destination, Reason, Processing Status, Approval Status, Attachments, and Expense Report. The table contains four rows of data.

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	<a href="#">Add</a>	<a href="#">Create</a>
07/11/2013	07/12/2013	New York City	Seminar - Entered by M. Hernandez	transferred to FI	Request Approved	<a href="#">Add</a>	<a href="#">Create</a>
07/16/2013	07/17/2013	dasfasdf	sdfasfd	Released for Approval	Request Recorded	<a href="#">Add</a>	<a href="#">Create</a>
07/08/2013	07/10/2013	Washington, D.C.	GASB Seminar	Released for Approval	Request Recorded	<a href="#">Add</a>	<a href="#">Create</a>

# PA STATE SYSTEM OF HIGHER EDUCATION

## Shared Administrative System

### TM – Travel Management

#### 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	<a href="#">Add</a>	<a href="#">Create</a>	
07/11/2013	07/12/2013	New York City	Seminar - Entered by M. Hernandez	transferred to FI	Request Approved	<a href="#">Add</a>	<a href="#">Create</a>	
07/16/2013	07/17/2013	dasfasdf	sdfasdf	Released for Approval	Request Recorded	<a href="#">Add</a>	<a href="#">Create</a>	
07/08/2013	07/10/2013	Washington, D.C.	GASB Seminar	Released for Approval	Request Recorded	<a href="#">Add</a>	<a href="#">Create</a>	

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](#)

# PA STATE SYSTEM OF HIGHER EDUCATION

## Shared Administrative System

### TM – Travel Management

#### 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	<a href="#">Add</a>	<a href="#">Create</a>
07/11/2013	07/12/2013	New York City	Seminar - Entered by M. Hernandez	transferred to FI	Request Approved	<a href="#">Add</a>	<a href="#">Create</a>
07/16/2013	07/17/2013	dasfasdf	sdfasdf	Released for Approval	Request Recorded	<a href="#">Add</a>	<a href="#">Create</a>
07/08/2013	07/10/2013	Washington, D.C.	GASB Seminar	Released for Approval	Request Recorded	<a href="#">Add</a>	<a href="#">Create</a>

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](#) [Setting](#)

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	<a href="#">Add</a>	
06/03/2013	06/05/2013	Hbg	Meeting	212.98	USD	Trip Approved	<a href="#">Add</a>	

# PA STATE SYSTEM OF HIGHER EDUCATION

## Shared Administrative System

### TM – Travel Management

#### Travel Assistant

---

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.”

---