Travel Management

Bloomsburg UNIVERSITY

Existing Travel Forms:

- Travel Approval Request (TAR) form;

- Travel Expense Report (TER) form;

- Vehicle Reservation Request form;

New Travel Management System:

- Travel Approval Requests entered/approved via Employee Self Service (ESS)/Manager Self Service (MSS) portal;

- Travel Expense Report entered/approved via ESS/MSS portal;

- Enterprise rental use trip number to reserve and complete Vehicle Reservation Request form;

- "Insurance Purpose Only/Non-Expense" fund centers created for each division;

Bloomsburg
UNIVERSITY

Summary of Changes:

- All employee travel approval requests (TAR) and expense reports (TER) are electronic, NO PAPER;

- Approvals for travel are routed through workflow and are electronic via Manager Self Service (MSS) portal;

- TERs do not route for re-approval if they are within $25.00 of the TAR, ($25 variance is at the Fund Center level);

- Travel is encumbered upon approval of the travel approval request;

- Subsistence rates are calculated automatically by selecting Trip Country, Trip Region, Trip Dates and Military Times;

- Fund Center managers who are also Travelers will approve their own travel;

Bloomsburg
UNIVERSITY

Summary of Changes:

- Inclusion of scanned receipts and/or required documentation (i.e. conference itinerary);
  - Be sure to sign and date each receipt prior to scanning

- Travel Assistants will have visibility of travelers trips, however travelers must send TARs and TERs for approval;

- Ability to create Personal Value Lists;

- Payroll and Accounts Payable information now linked;

- Inclusion of provision for classes during absence in the comment section of travel approval request.

Bloomsburg
UNIVERSITY

Benefits of Travel Management System:

- Travel approval requests and expense reports can be entered anywhere through the Web via Employee Self Service (ESS) portal;

- Likewise, electronic approvals of trip requests and travel expense reports can be completed anywhere through the Web via Manager Self Service (MSS) portal;

- Travelers have visibility of where requests/expense reports are in the process;

- Budgetary commitments for travel approval requests and expense reports are automatically created;

- Attach documentation/receipts to travel approval request/expense reports for approvers to review from remote locations;

- Reportable database of travel expenses.

Bloomsburg
UNIVERSITY

Workflow Process:

Traveler/Administrative Assistant Enters Travel Approval via ESS

↓

Supervisor/Chair

↓

Dean/Org Unit Chief

↓

Fund Center Manager
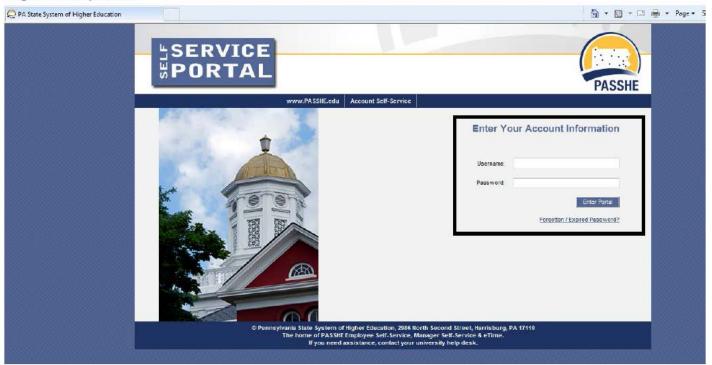
↓

Grant Accountant

↓

> $500
Provost/VP

↓

Out of Country
Provost/VP

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

Log into the portal...

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

How To:

- Enter Travel Approval Request;
    - Insurance Purpose Only/Non expense Travel Approval;
    - Search for Trip Region;
    - View Status of Travel request or report;
    - Create Favorites;

- Enter Travel Expense Report against Request;
    - Reimbursement Prior to trip (Prepaid Expenses), for example airfare or conference fees;

- Approve Travel Approval Request/Travel Expense Report;

- Daily Travel with more than one destination;

Bloomsburg
UNIVERSITY

Common Issues:

- If approval log is not visible, traveler has not clicked "save and send for approval"
- When creating expense report and travel dates have passed, it will require you to delete the estimated costs
- Prepaid Conference registration – adjust the estm – do not delete
- When selecting third party vendors, make sure to scroll down the list to "X: pd to vendor"
- Link expense reports to existing travel requests
- Some locations – Montoursville – may not be there; search for county
- For admins to review first, set up rule to forward emails
- Remember when attaching receipts, to initial and date
- When an admin creates or modifies a travel document, the traveler is not automatically notified

Bloomsburg
UNIVERSITY

Common Problems:

Sample 1:

Trip Number	Start Date	End Date	Destination	Reason	Processing Status	Approval Status	Attachments	Expense Report	A
1000003321	07/20/2016	07/20/2016	▓▓▓▓▓▓▓▓	▓▓▓▓▓▓	In Processing	Request Open	Add	Create	
1000003290	04/28/2016	04/28/2016	▓▓▓▓▓▓▓▓	▓▓▓▓▓	In Processing	Request Open	Add	Create	

Sample 2:

Destination
* Trip Country: Standard Conus Rate, USA ▼   Trip Region: PA/HK   Harrisburg, PA
* Destination: 319 North Front Street, Harrisburg, PA 17101

Sample 2: