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

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.
• 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 main screen...

Required fields are marked with an asterisk (*).
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.
Search Feature

- To utilize the search feature, click 🔄.

Destination

*Trip Country: Standard Conus Rate, USA  ▼ Trip Region:  □ Scranton, PA
*Destination:

- The following will appear. Click All Values

Search: Trip Region

Personal Value List: There are 1 entries for Trip Region

<table>
<thead>
<tr>
<th>Trip Country</th>
<th>Trip Region</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>US</td>
<td>PA/PAK</td>
<td>Allentown, PA</td>
</tr>
</tbody>
</table>

- Click Show Search Criteria

Search: Trip Region

Results List: There are more than 500 results for Trip Region

Create Travel Request BU
The highlighted fields need to be filled in:

- On the row “Trip Region Code” click the second column drop down and select “contains”
- In the box to the right, enter your state abbreviation and “*” (PA*)
  - NOTE: It is important to use all CAPS and a “*” in this field

- On the row “Name of Trip Region”, click the second column drop down and select “contains”
- In the box to the right, enter the first few letters of the desired city and “*” (Pitt*)
  - NOTE: Be sure to capitalize the first letter and include the “*” in this field
  - If your city is not listed, you will need to use the county
- Click search

Your search results will appear below
- Double click on the desired location to select and return to the main screen
In this example, Pittsburgh was chosen.
• Additional Destinations –

Note: All required fields must be populated on the main screen before you can enter additional destinations!

See page 15 for this information.

**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.

- Reason – Provide reason for travel.
• Estimated Costs – Enter details by clicking on “Enter Estimated Costs”
  o 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 Bloomsburg – 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 request to zero utilize the following steps:
  o Insert a negative amount to offset the total shown in the “sum” field so that your total becomes zero
  President Travel Non-Expense – 1011450100
  o You may use the “calculate” button to assure the sum is zero
• 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
Cost Assignment – The cost assignment will default from your HR Master Data. If you wish to override the default, click on “Change Cost Assignment”;
  
  You may change the fields identified below;

  - Cost Assign (%) allows the traveler to distribute costs by percentage among several Cost Centers or WBS’s;

  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.

  - Accounting Object selections include Cost Center, WBS, and (Internal) Order;
  - Many options are available to search for a cost object including searching for previously used objects or creating a Personal Value List.
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.

- Additional Destinations – Click on “Enter Additional Destinations” to enter appropriate information
Additional Destination data initially defaults from the Main Destination. You must change the Date, Time, Destination and Reason fields (see blue line). You may also need to change the Activity and Trip Region as well (use tool shown below as in previous selection). Click on Accept to record your new entries. If everything looks correct, click on Accept again to return to the main screen.
Once all data has been entered to your satisfaction, click on either of the “Review” buttons.
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).

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