

PA STATE SYSTEM OF HIGHER EDUCATION

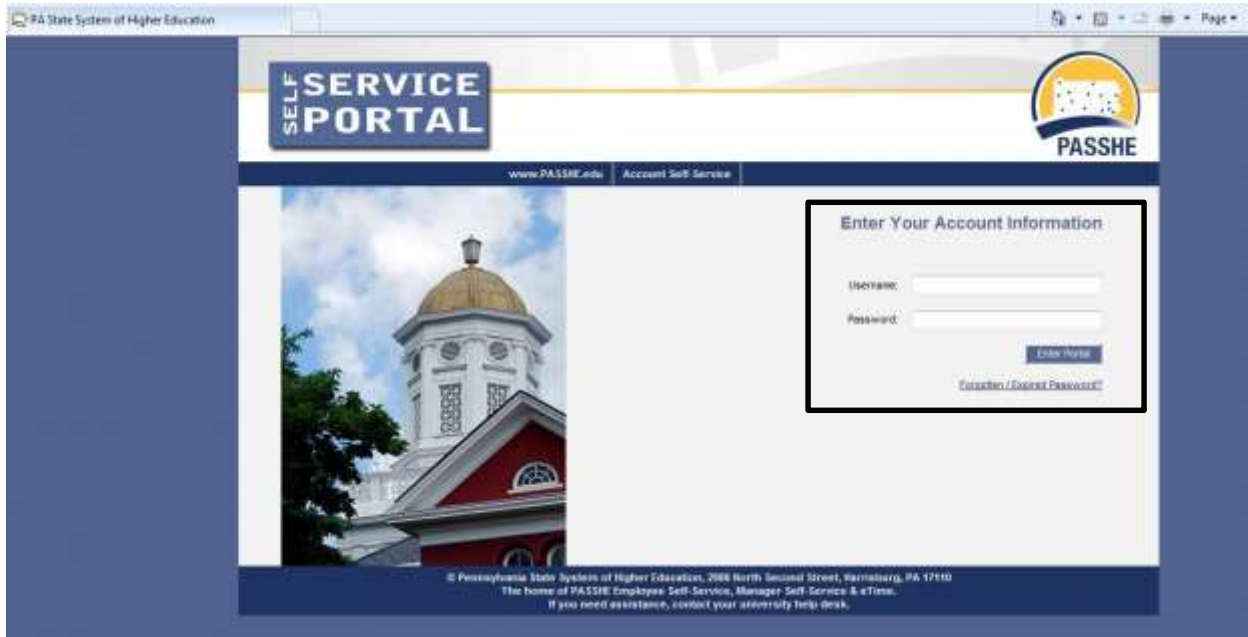
Shared Administrative System

TM – Travel Management

Approve Trip

All trips (Travel Requests and Expense Reports) will be approved via the portal.

Log into the portal...



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

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

Overview | My Staff | Employee Time Approval | **Travel Management** | Help Documents

Overview

Welcome Danielle to Manager Self-Service!

Areas of Manager Self-Service

My Staff

The **My Staff** area of Manager Self-Service provides managers with an overview of their employee's basic information such as attendance, important dates, and organizational information.

Employee Time Approval

Managers can use the **Employee Time Approval** area of Manager Self-Service (MSS) to view approved leave requests that have been submitted by members of their staff. This area also provides reporting tools to managers regarding employee leave.

Travel Management

In the **Travel Management** area of the Manager Self Service tab, managers can approve Travel Requests and/or Travel Expense Reports, view any trip information or attachments, and email the traveler if more information is needed.

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Next, click on Approve Trip Items

SELF SERVICE PORTAL

Welcome Danielle Peters

Last Logon: Tue, 01/20/2015 09:04:54

HomeEmployee Self-ServiceManager Self-ServiceeTimeBusiness Intelligence

Overview|My Staff|Employee Time Approval|Travel Management|Help Documents

Travel Management Overview

Manager Self-Service >> Travel Management

This page will provide you with information about each available Manager Self-Service (MSS) application for you to access a new page with the MSS application you have chosen. A link to this sub-sections overview page will be shown to the left.

Available Applications

Approve Trip Items

In this section, managers can access their Inbox in order to approve travel Requests and/or Expense Reports and to view the traveler's supporting documentation.

View Travel Requests and Expense Reports Approved By Me

This page will show you a detailed listing of all travel requests and expense reports that you as the approver have either approved, rejected, or approved for cancellation.

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All trips that are awaiting your approval will be listed in the Business Workplace Inbox.

Note that cost center managers will need to approve their own trips.

Approve Trip Items

Business Workplace Inbox for: Newman, Debra

This page provides a list of all travel items in your business inbox that require your attention. Start by clicking the basics details of the item. From that window you may then either approve or reject the travel request or expense r

Items Awaiting Your Approval

Refresh Inbox

Creation Date	Item Description
01/15/2015	Approve Travel Expense for Peters , Danielle Marie - Supervisor and Org Unit Chief.

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Click on the line you wish to act upon, and additional details for that trip will be shown.

The screenshot shows a web application interface for 'Approve Trip'. At the top, there is a navigation bar with tabs for 'Home', 'Employee Self-Service', 'Manager Self-Service', 'Materials Management', 'SAP GUI', and 'Business Intelligence'. Below this is a secondary navigation bar with links for 'Overview', 'My Staff', 'Employee Time Approval', 'Travel Management', and 'Help Documents'. On the left side, there is a sidebar with 'Approve Trip Items' and 'Detailed Navigation' sections. The 'Detailed Navigation' section includes a link for 'Travel Management Overview'. The 'Related Links' section includes links for '24 Hour Clock Conversion Chart', 'Google Maps', 'US Census Bureau County Look Up', 'Frequently Used Trip Regions', and 'Travel Reimbursement Rates'. The main content area is titled 'Items Awaiting Your Approval' and features a 'Refresh Inbox' button. Below this is a table with two columns: 'Creation Date' and 'Item Description'. The table contains one entry: '01/15/2015 Approve Travel Expense for Peters , Danielle Marie - Supervisor and Org Unit Chief.'. Below the table is the 'Item Details' section, which displays the following information: Employee Name: Peters, Danielle; Employee No: [REDACTED]; Trip Number: 1000000210; Trip Start: 01/16/2015 08:00:00; Trip End: 01/16/2015 15:00:00; Reason: Planning Meeting; Location: Lehigh Univeristy; Destination: Allentown, PA; Estimated Cost: \$0.00; Total Cost: \$182.13; Advance: \$0.00; Approver of WF Steps: Supervisor and Org Unit Chief; To Process Request: https://portal.passh.edu/travel_inbox.jsp. At the bottom of the details section, there are four buttons: 'Display Form', 'Email Traveler', 'Approve', and 'Reject'.

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If you would like to see the Request/Expense Report in even greater detail, click on the Display Form button.

The screenshot displays the 'Approve Trip Items' page. The navigation bar includes 'Home', 'Employee Self-Service', 'Manager Self-Service', 'Materials Management', 'SAP GUI', and 'Business Intelligence'. The main navigation menu shows 'Overview', 'My Staff', 'Employee Time Approval', 'Travel Management', and 'Help Documents'. The left sidebar contains 'Approve Trip Items', 'Detailed Navigation', 'Travel Management Overview', and 'Related Links' (including 24 Hour Clock Conversion Chart, Google Maps, US Census Bureau County Look Up, Frequently Used Trip Regions, and Travel Reimbursement Rates).

The main content area features a message: 'This page provides a list of all travel items in your business inbox that require your attention. Start by clicking the basics details of the item. From that window you may then either approve or reject the travel request or expense r'. Below this is a 'Refresh Inbox' button and a table of items awaiting approval.

Creation Date	Item Description
01/15/2015	Approve Travel Expense for Peters , Danielle Marie - Supervisor and Org Unit Chief.

The 'Item Details' section provides the following information:

- Employee Name: Peters, Danielle
- Employee No: [REDACTED]
- Trip Number: 1000000210
- Trip Start: 01/16/2015 08:00:00
- Trip End: 01/16/2015 15:00:00
- Reason: Planning Meeting
- Location: Lehigh Univeristy
- Destination: Allentown, PA
- Estimated Cost: \$0.00
- Total Cost: \$182.13
- Advance: \$0.00
- Approver of WF Steps: Supervisor and Org Unit Chief.
- To Process Request: https://portal.pashe.edu/travel_inbox.jsp

At the bottom of the details section are four buttons: 'Display Form' (highlighted with a red box), 'Email Traveler', 'Approve', and 'Reject'.

You can display any Attachments that the traveler added to the trip by clicking on [View Attachments](#) .

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If you need to email the traveler for any reason, click on Email Traveller and the following pop-up box will appear allowing you to create and send a message.

Send Message to Traveler

To: Message will be sent to: DPETERS@BLOOMU.EDU

Cc:

***** To enter multiple recipients, add comma "," between mail ids**

Send a copy of this message to me

B *I* H1 H2 H3

Send Message Cancel

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Next, you can either Approve or Reject the trip by clicking on the appropriate button.

Items Awaiting Your Approval

<input type="button" value="Refresh Inbox"/>	
Creation Date	Item Description
01/15/2015	Approve Travel Expense for Peters , Danielle Marie - Supervisor and Org Unit Chief.

Item Details

Employee Name: Peters, Danielle
Employee No: [REDACTED]
Trip Number: 1000000210
Trip Start: 01/16/2015 08:00:00
Trip End: 01/16/2015 15:00:00
Reason: Planning Meeting
Location: Lehigh Univeristy
Destination: Allentown, PA
Estimated Cost: \$0.00
Total Cost: \$182.13
Advance: \$0.00
Approver of WF Steps: Supervisor and Org Unit Chief.
To Process Request: https://portal.passhe.edu/travel_inbox.jsp

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Note: If you need to approve the trip for multiple steps in workflow, you only need to take action once. In this example, M. Delaney is approving the trip as the Supervisor, Org Unit Chief, and Account Manager.

Items Awaiting Your Approval


Creation Date	Item Description
01/15/2015	Approve Travel Expense for Peters , Danielle Marie - Supervisor and Org Unit Chief.

Item Details

Employee Name: Peters, Danielle
Employee No: [REDACTED]
Trip Number: 1000000210
Trip Start: 01/16/2015 08:00:00
Trip End: 01/16/2015 15:00:00
Reason: Planning Meeting
Location: Lehigh University
Destination: Allentown, PA
Estimated Cost: \$0.00
Total Cost: \$182.13
Advance: \$0.00
Approver of WF Steps: Supervisor and Org Unit Chief. ←
To Process Request: https://portal.passhe.edu/travel_inbox.jsp


Once you Approve or Reject the workflow item, it will disappear from your inbox.

Business Workplace Inbox for: Newman, Debra

 Trip number 1000000210 has been successfully approved! ←

This page provides a list of all travel items in your business inbox that require your attention. Staff can view basic details of the item. From that window you may then either approve or reject the travel request.

Items Awaiting Your Approval

Creation Date	Item Description
 There are currently no items awaiting your approval. ←	

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The Approval Log on the form is dynamically updated as the trip moves through workflow. This allows the traveler, travel assistant, and accounts payable office to know exactly where the trip is within the approval process at any given time.

Approval Log					
Work Flow Level	Planned Approver Name	Actual Approver Name	Date	Time	Work Flow Approval Status
Supervisor	Delaney , Matthew	Delaney , Matthew	Apr 9, 2014	2:32:02 PM	A

Work Flow Level	Planned Approver Name	Actual Approver Name	Date	Time	Work Flow Approval Status
Org Unit Chief	Delaney , Matthew	Delaney , Matthew	Apr 9, 2014	2:32:02 PM	A
Account Manager 01	Delaney , Matthew	Delaney , Matthew	Apr 9, 2014	2:32:02 PM	A
Grant Manager	Johnsøn , Craig		Apr 9, 2014	2:09:52 PM	W
Out-of-State Manager	Silberman , Gerald		Apr 9, 2014	2:09:52 PM	W
A/P Approval	Vink , Mary		Apr 9, 2014	2:09:52 PM	W

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You may access a listing of all reports approved by you by selection the “View Travel Requests and Expense Reports Approved by Me” in the travel management screen.

Available Applications

Approve Trip Items



In this section, managers can access their Inbox in order to approve travel Requests and/or Expense Reports and to view the traveler’s supporting documentation.


View Travel Requests and Expense Reports Approved By Me


This page will show you a detailed listing of all travel requests and expense reports that you as the approver have either approved, rejected, or approved for cancellation.

You can search by date, status or employee (date is required)

Travel Requests / Expense Reports Approved By Me

*Date from:  *To: 

Search for: 

For Employee: 

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And receive a list of all applicable trips. This will also allow you to view in detail individual trips.

Trip Request							
	Personnel No.	Employee Name	Trip Number	WF Level Desc	Date	Time	WF Status
		DaniellePeters	1000000202	Supervisor	11/14/2014	09:17:01	Approved
		DaniellePeters	1000000202	Org Unit Chief	11/14/2014	09:17:02	Approved
		DaniellePeters	1000000207	Supervisor	01/08/2015	14:09:11	Approved
		DaniellePeters	1000000207	Org Unit Chief	01/08/2015	14:09:12	Approved
		DaniellePeters	1000000198	Supervisor	11/06/2014	15:11:52	Approved
		DaniellePeters	1000000198	Org Unit Chief	11/06/2014	15:11:53	Approved
		DaniellePeters	1000000203	Supervisor	01/09/2015	14:52:27	Approved
		DaniellePeters	1000000203	Org Unit Chief	01/09/2015	14:52:27	Approved