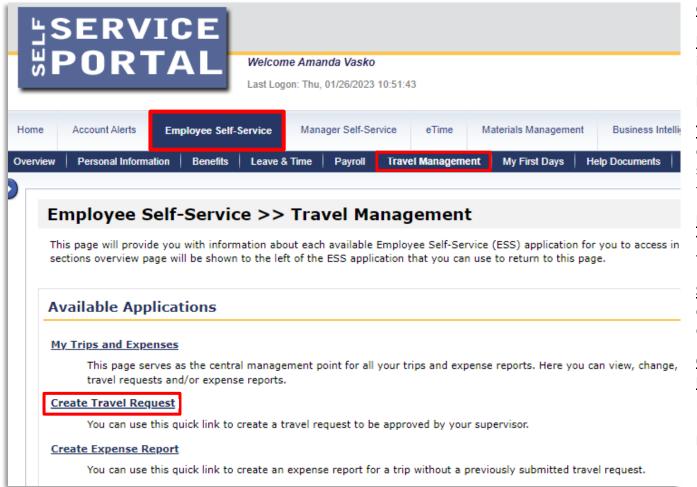## <u>Travel Management</u> – Creating a Travel Request

<u>General Information:</u>

<u>Do Not</u> use <u>Microsoft Edge</u> – the browser is incompatible with the program and can cause lags, glitches or drop some features of the program.

<u>Turn off Pop-Up Blocker</u> – most displays will open in a new window and an aggressive setting on a Pop-Up Blocker will prevent them from opening.

<u>IT Help</u> – Email <u>IT Help</u> if you do not have **Travel Management** on your **ESS** navigation. There are some accounts/users not added.

<u>Save Draft</u> – Save Draft often as the program can lag and appear to save – but has actually dropped everything you just entered.

<u>Commonwealth Travel Policy Manual & Kutztown University Travel Policy</u> – Review what is a non-reimbursable expense. Ex: Travel Insurance, Seat Upgrades, Preferred boarding etc.

<u>Why should I Create a Travel Request?</u>

You should **Create a Travel Request** prior to going on an overnight trip to have the system encumber the funds for your expenses.

Even when a supervisor has given approval for a trip – either verbal or in an email - until it is recorded in **Travel Management** – you could submit for reimbursement (via an Expense Report) and have the Expense Report fail because of insufficient funds.

<u>Where to go to Create a Travel Request</u> - Sign in to ESS → Employee Self-Service → Travel Management → Create Travel Request

Create Travel Request   SAP   Help

1 **General Data** — 2 Review and Send — 3 Completed

Employee Vasko , Amanda ▇▇▇▇

‹ 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: ⧉ Standard Conus Rate, USA
* Destination: ⧉
Additional Destinations: No destinations entered | Enter Additional Destinations |

General Data – Start Date & End Date
The Start Date and End Date are the important parts to complete.

The time **00:00** will not matter until the Expense Report is created and you need to note if it is for a full day or half day of travel.

[The format is military time ex: 4:00 pm is 16:00]

Trip Country - DO NOT CHANGE if this is for domestic travel.

Trip Region - Is the most important field to complete.
You can not submit your request without completing this portion
Click on ⧉ to open [Select: Trip Region] (see below)

Destination - Is a free fill field. It does not affect the form other than it is a required field.

Select: Trip Region   ⤢ ✕

Hide Advanced Search   Result <= 500 items   **Go** ④

① Trip Country/Group: US ⊗ ⧉   ② Country/Group/Region: PA* ⊗ ⧉
③ Name of Trip Country: Phila* ⊗ ⧉

Items (2)

	Trip Country	Trip Region Code	Name of Trip Region
○	US	PA/PV	Philadelphia County, PA
⑤ ○	US	PA/PU	Philadelphia, PA

Cancel

Select: Trip Region – Domestic Travel

1. **Trip Country/Group** → Default is [US] for domestic travel – **Do Not Change**

2. **Country/Group/Region** → You will enter the State Abbreviation here → In **CAPS** → ending with an ✱ asterisk

3. **Name of Trip Country** → The name of the city is entered here either in part or completely → It is case sensitive → it also must end with an ✱ asterisk

4. **Hit [Go]** → to pull up your search results

5. **Click** ○ → next to result you want to select → this will take you back to the General Data page

Additional Information -

1. Activity (Expenses) → Most of travel falls under [General Travel] → the drop down list has multiple options, select the one that best matches

2. Reason → Is a short - free fill field
Put a brief description here Ex: [Name of] Conference, [Name of Group] Regional Meeting, [Department] Study Abroad [Year/Date] etc.

3. Comment → You can enter further trip details here. If you have a budget to remain within here is a good place to make note as this section will transfer to the Expense Report.

4. Advances → **!! DO NOT USE !!** Kutztown University does not issue Advances

5. Cost Assignment → Always defaults to your department Cost Center
*For multiple Cost Centers use → Travel Management – Change Cost Center Assignment

Estimated Costs -

The system will make estimates based on the code entered in Trip Region.

Any place the system has put an Estimated Cost can not be **zeroed** to **$0.00** → You can only reduce it to a **$1.00 value.**

Sum does not total until you hit → [Calculate]

Z: Unfunded Travel Costs → must be entered as a **negative** to subtract from the Estimated Costs.
You will use this to bring your Estimated Costs down in order to stay in budget.

Accept → Will save your Estimated Costs and return you to the General Data page.

Review and Send

Final Action → **Save Draft** or **Save and Send for Approval**

Save Draft → Saves the changes you made but does not submit your request for Approval.

Save and Send for Approval → Submits your request to your Supervisor and Account Manager. *If you are using more than one Cost Center there may be additional Account Managers that need to approve your request.*

Once your request is **Approved** you will be able to create a linked Expense Report that will carry over the Approvals and Estimated Costs.

Why use a linked Expense Report? – The Expense Report that shares the same Trip Number as the Travel Request carries over the approval for the amount that was requested. As long as you don't go over the **Estimated Costs** amount, the Expense Report will go straight to review for reimbursement.

Need to make a Change?

Go to My Trips and Expenses → All My Travel Requests

Select the [ ] next to the **Trip Number** → the **[Change]** button will no longer be greyed out and you can use it to re-open your Travel Request.

Apply your changes → Save and Send for Approval

Note: Making Changes to a Travel Request and/or Expense Report resets the Approval Process – it goes back to step one for your Supervisor to Approve.