

Commonwealth University

TM – Travel Management

“For Insurance Purposes Only”

Reporting

Log into the portal and access travel management.

Follow the steps listed in the document “Create Travel Request” until the point that you have entered the General Data and Destination information.

Click on “Enter Estimated Costs”

Create Travel Request

1 General Data 2 Review and Send 3 Completed

Employee Peters [REDACTED]

< Previous Step Review > Save Draft

Calendar of Trips Attachments (0)

General Data

* Start Date: 02/10/2015 08:00
* End Date: 02/10/2015 18:00
Posting Date: 02/10/2015

Destination

* Trip Country: Standard Conus Rate, USA Trip Region: PA/AK Allentown, PA
* Destination: Lehigh Univeristy

Additional Destinations: No destinations entered Enter Additional Destinations

Additional Information

* Activity (Expenses): Administrative Travel
* Reason: Meeting
* Estimated Costs: 31.88 USD **Enter Estimated Costs**
Comment:
Advances: 0.00 United States Dollar Enter Advances
Cost Assignment: 100.00 % Cost Center 1011030202 (Fin & Bus Services), Funds Center 1011030202 Change Cost Assignment

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- Estimated Costs – Enter details by clicking on “Enter Estimated Costs”
 - Populate the appropriate expense type category and click on “Calculate”
 - When everything looks correct, click on “Accept” to return to the main screen

Estimated Costs

Calculate

Travel Mediums	Estimated Costs	Currency
Airfare	0.00	USD
Baggage Fee	0.00	USD
Business Meal (auth required)	0.00	USD
Conference Regist.	0.00	USD
Gasoline	0.00	USD
Hotel	384.00	USD
Meals/Subsistence	213.00	USD
Mileage Reimb	0.00	USD
Other Miscellaneous Costs	0.00	USD
Parking	0.00	USD
Car rental	0.00	USD
Taxi, shuttle, public trans.	0.00	USD
Toll	0.00	USD
Train	0.00	USD
Z: Unfunded Travel Costs	0.00	USD
Sum	697.00	USD

← Previous Step **Accept** Save Draft

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)

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- Enter the estimated costs for the trip, remember to adjust meals for any provided and if there is not a hotel cost reduce this to \$.01; (Hotel and Meal amounts must be a minimum of \$.01);
- “For Insurance Purposes” the Travel Approval Request (TAR) sum must be zero. To achieve this the traveler will enter a negative dollar amount under **“Z: Unfunded Travel Costs”**;

- **Example:** If trip total is cost is \$200.00, enter \$ -200.00, see below;

Estimated Costs		
Calculate		
Travel Mediums	Estimated Costs	Currency
Airfare	0.00	USD
Baggage Fee	0.00	USD
Business Meal (auth required)	0.00	USD
Conference Regist	0.00	USD
Gasoline	0.00	USD
Hotel	150.00	USD
Meals/Subsistence	50.00	USD
Mileage Reimb	0.00	USD
Other Miscellaneous Costs	0.00	USD
Parking	0.00	USD
Car rental	0.00	USD
Taxi, shuttle, public trans.	0.00	USD
Toll	0.00	USD
Train	0.00	USD
Z: Unfunded Travel Costs	0.00	USD
Sum	200.00	USD

Estimated Costs		
Calculate		
Travel Mediums	Estimated Costs	Currency
Airfare	0.00	USD
Baggage Fee	0.00	USD
Business Meal (auth required)	0.00	USD
Conference Regist	0.00	USD
Gasoline	0.00	USD
Hotel	150.00	USD
Meals/Subsistence	50.00	USD
Mileage Reimb	0.00	USD
Other Miscellaneous Costs	0.00	USD
Parking	0.00	USD
Car rental	0.00	USD
Taxi, shuttle, public trans.	0.00	USD
Toll	0.00	USD
Train	0.00	USD
Z: Unfunded Travel Costs	200.00-	USD
Sum	0.00	USD

Click “Accept” to save and return to the main screen;

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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.

← Previous Step **Save and Send for Approval**

some estimated costs are initialized

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 Individual Receipts	597.00 USD
Total Travel Expenses	687.00 USD
Amount Reimbursed	687.00 USD
Amount Paid Out	687.00 USD
Estimated Costs	687.00 USD

Cost Assignment

597.00 USD Company Code SSHE (State System of Higher Ed), Business Area 10 (Bloomsburg), Cost Center 1011030

Display Request Form

← Previous Step **Save and Send for Approval**

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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.

Create Travel Request

1 General Data 2 Review and Send 3 Completed

Employee Meyer, [REDACTED] Start Date 07/15/2013 End Date 07/17/2013

◀ Previous Step Save and Send for Approval

Travel request 1000000002 was saved ← [REDACTED]

100.00 % will be assigned acc. to trip costs assignment guidelines

Display Request Form

◀ Previous Step Save and Send for Approval

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This trip will now be listed on the “My Trips and Expenses” overview screen.

All My Trips (3) | All My Travel Requests (3) | All My Expense Reports (0) | Pending Exp. Reports (0)

View: [Standard View] | Create New Travel Request | Create New Expense Report | Cancel Trip

Trip Number	Start Date	End Date	Destination	Reason	Recommended Actions
1000000208	01/14/2015	01/17/2015	Conference on Bean Counting	Training Conference	Change Travel Request
1000000133	10/09/2014	10/10/2014	State College, PA	Budget & Accounting Directors Meeting	Create Travel Expense Report
1000000121	10/21/2014	10/21/2014	Wyomissing, PA	Attend Central Chapter PSTAP Tax Seminar	Create Travel Expense Report

Details of Trip: Conference on Bean Counting (1000000208)

Travel Request

Approval Status: Request Recorded | Attachments: Add

Display/Print | Change | Copy | Delete

All My Trips (3) | **All My Travel Requests (3)** | All My Expense Reports (0) | Pending Exp. Reports (0)

View: [Standard View] | Display/Print | Change | Copy | Delete | Cancel Trip | Create New Travel Request

Trip Number	Start Date	End Date	Destination	Reason	Processing Status	Approval Status	Attachments	Expense Report
1000000208	01/14/2015	01/17/2015	Conference on Bean Counting	Training Conference	Released for Approval	Request Recorded	Add	Create
1000000133	10/09/2014	10/10/2014	State College, PA	Budget & Accounting Directors Meeting	transferred to FI	Request Approved	Add	Create
1000000121	10/21/2014	10/21/2014	Wyomissing, PA	Attend Central Chapter PSTAP Tax Seminar	transferred to FI	Request Approved	@ (1)	Create

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.