

PA STATE SYSTEM OF HIGHER EDUCATION

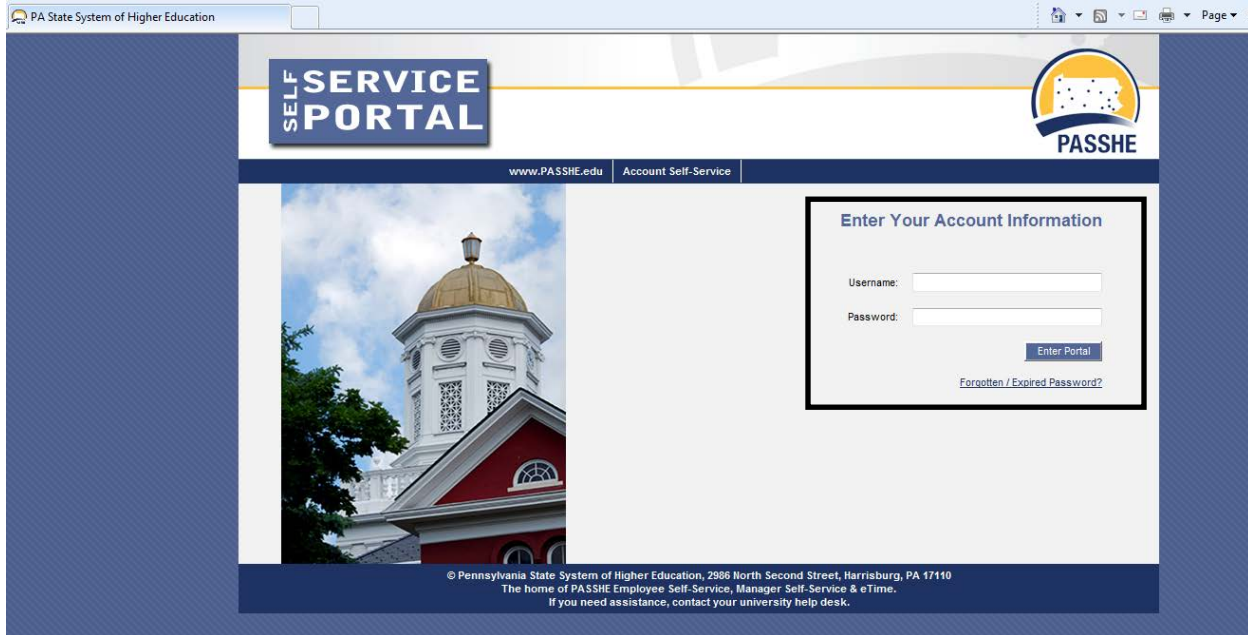
Shared Administrative System

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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Approve Trip

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

The screenshot shows the 'Manager Self-Service' page. The navigation bar includes 'Home', 'Employee Self-Service', 'Manager Self-Service', 'Materials Management', and 'Business Intelligence'. The 'Travel Management' link is highlighted with a red box. Below the navigation bar, there is a 'Welcome Craig to Manager Self-Service!' message. The 'Areas of Manager Self-Service' section includes 'Travel Management' (highlighted with a red box) and 'Help Documents'. The 'Travel Management' section contains the text: 'Travel Management approval and stuff.' The 'Help Documents' section contains the text: 'Under the **Help Documents** area of Manager Self-Service you will find manuals and other resources provided to managers to assist them with using the various Manager Self-Service.'

Next, click on Approve Trip Items

The screenshot shows the 'Manager Self-Service >> Travel Management' page. The navigation bar includes 'Home', 'Employee Self-Service', 'Manager Self-Service', 'Materials Management', and 'Business Intelligence'. The 'Travel Management' link is highlighted with a red box. Below the navigation bar, there is a 'Travel Management' section. The 'Manager Self-Service >> Travel Management' section contains the text: 'This page will provide you with information about each available Manager Self-Service (MSS) application for you to access in this sub-section of MSS. To access an overview page will be shown to the left of the MSS application that you can use to return to this page.' The 'Available Applications' section includes 'Approve Trip Items' (highlighted with a red box) and 'Travel Request Approval'.

PA STATE SYSTEM OF HIGHER EDUCATION

Shared Administrative System

TM – Travel Management

Approve Trip

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

Home | Employee Self-Service | **Manager Self-Service** | Materials Management | Business Intelligence

Overview | **Travel Management** | Help Documents

Approve Trip Items

Detailed Navigation

- Travel Management Overview

Business Workplace Inbox for: Delaney, Matthew

This page provides a list of all travel items in your business inbox that require your attention. Start by clicking the button to the left of an item to view the basics details of the item. From that window you may then either approve or reject the travel request or expense report. You may also click on the item to view the full details.

Items Awaiting Your Approval	
Refresh Inbox	
Creation Date	Item Description
04/09/2014	Approve Travel Request for Shaeffer, Rachelle E - Supervisor, Org Unit Chief and Account Manager 01.

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

Home | Employee Self-Service | **Manager Self-Service** | Materials Management | Business Intelligence

Overview | **Travel Management** | Help Documents

Approve Trip Items

Detailed Navigation

- Travel Management Overview

Business Workplace Inbox for: Delaney, Matthew

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Items Awaiting Your Approval	
Refresh Inbox	
Creation Date	Item Description
04/09/2014	Approve Travel Request for Shaeffer, Rachelle E - Supervisor, Org Unit Chief and Account Manager 01.

Item Details

Employee Name: Shaeffer, Rachelle
 Employee No: [REDACTED]
 Trip Number: 4500000000
 Trip Start: 04/07/2014 08:00:00
 Trip End: 04/08/2014 16:00:00
 Reason: NR: Attend conference
 Location: Baltimore, MD
 Destination: Baltimore, MD
 Estimated Cost: \$672.38
 Total Cost: \$672.38
 Advance: \$100.00
 Approver of WF Steps: Supervisor, Org Unit Chief and Account Manager 01.
 To Process Request: https://portal.passhe.edu/travel_inbox.jsp

PA STATE SYSTEM OF HIGHER EDUCATION

Shared Administrative System

TM – Travel Management

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

Business Workplace Inbox for: Delaney, Matthew

This page provides a list of all travel items in your business inbox that require your attention. Start by clicking the button to the left of an entry of the item. From that window you may then either approve or reject the travel request or expense report. You may also display the request details.

Items Awaiting Your Approval

Refresh Inbox

Creation Date	Item Description
04/09/2014	Approve Travel Request for Shaeffer, Rachelle E - Supervisor, Org Unit Chief and Account Manager 01.

Item Details

Employee Name: Shaeffer, Rachelle
Employee No: [REDACTED]
Trip Number: 4500000000
Trip Start: 04/07/2014 08:00:00
Trip End: 04/08/2014 16:00:00
Reason: NR: Attend conference
Location: Baltimore, MD
Destination: Baltimore, MD
Estimated Cost: \$672.38
Total Cost: \$672.38
Advance: \$100.00
Approver of WF Steps: Supervisor, Org Unit Chief and Account Manager 01.
To Process Request: https://portal.passhe.edu/travel_inbox.jsp

You can display any Attachments that the traveler added to the trip by clicking on

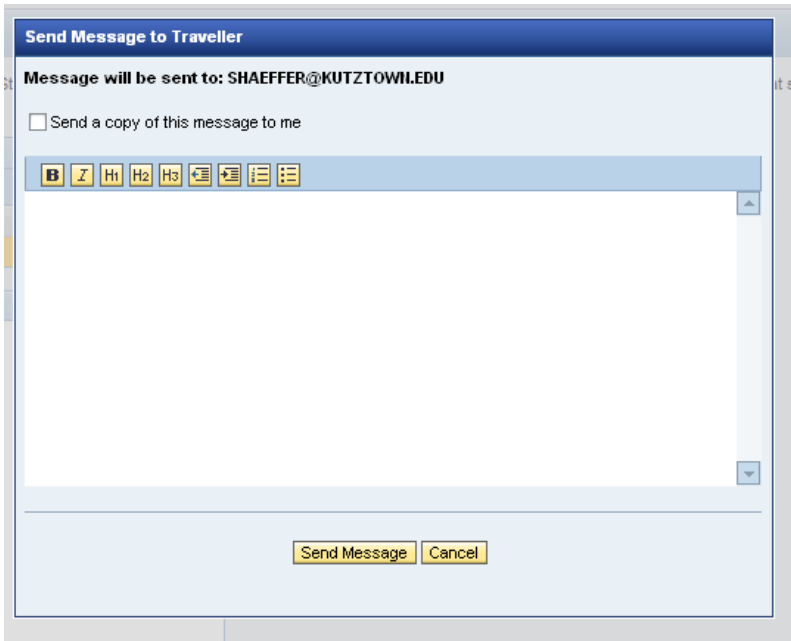
PA STATE SYSTEM OF HIGHER EDUCATION

Shared Administrative System

TM – Travel Management

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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.



The screenshot shows a pop-up window titled "Send Message to Traveller". The window has a blue header bar with the title. Below the header, it displays "Message will be sent to: SHAEFFER@KUTZTOWILE.EDU". There is a checkbox labeled "Send a copy of this message to me" which is currently unchecked. Below the checkbox is a rich text editor toolbar with icons for Bold (B), Italic (I), Underline (U), Bulleted List (H1), Numbered List (H2), Indent (H3), Undo, Redo, Link, and Unlink. The main body of the window is a large white text area for composing the message. At the bottom of the window, there are two buttons: "Send Message" and "Cancel".

PA STATE SYSTEM OF HIGHER EDUCATION

Shared Administrative System

TM – Travel Management

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

Business Workplace Inbox for: Delaney, Matthew

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Items Awaiting Your Approval

Refresh Inbox

Creation Date	Item Description	
04/09/2014	Approve Travel Request for Shaeffer, Rachelle E - Supervisor, Org Unit Chief and Account Manager 01.	

Item Details

Employee Name: Shaeffer, Rachelle
Employee No: [REDACTED]
Trip Number: 4500000000
Trip Start: 04/07/2014 08:00:00
Trip End: 04/08/2014 16:00:00
Reason: NR: Attend conference
Location: Baltimore, MD
Destination: Baltimore, MD
Estimated Cost: \$672.38
Total Cost: \$672.38
Advance: \$100.00
Approver of WF Steps: Supervisor, Org Unit Chief and Account Manager 01.
To Process Request: https://portal.pashe.edu/travel_inbox.jsp

PA STATE SYSTEM OF HIGHER EDUCATION

Shared Administrative System

TM – Travel Management

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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.

Business Workplace Inbox for: Delaney, Matthew

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Items Awaiting Your Approval

Refresh Inbox

Creation Date	Item Description
04/09/2014	Approve Travel Request for Shaeffer, Rachelle E - Supervisor, Org Unit Chief and Account Manager 01.

Item Details

Employee Name: Shaeffer, Rachelle
Employee No: [REDACTED]
Trip Number: 4500000000
Trip Start: 04/07/2014 08:00:00
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Reason: NR: Attend conference
Location: Baltimore, MD
Destination: Baltimore, MD
Estimated Cost: \$672.38
Total Cost: \$672.38
Advance: \$100.00
Approver of WF Steps: Supervisor, Org Unit Chief and Account Manager 01
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: Delaney, Matthew

Trip number 4500000000 has been successfully approved!

This page provides a list of all travel items in your business inbox that require your attention. Start by clicking the button to the left of an entry of the item. From that window you may then either approve or reject the travel request or expense report. You may also display the request details.

Items Awaiting Your Approval

Refresh Inbox

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	Johnsbn , 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