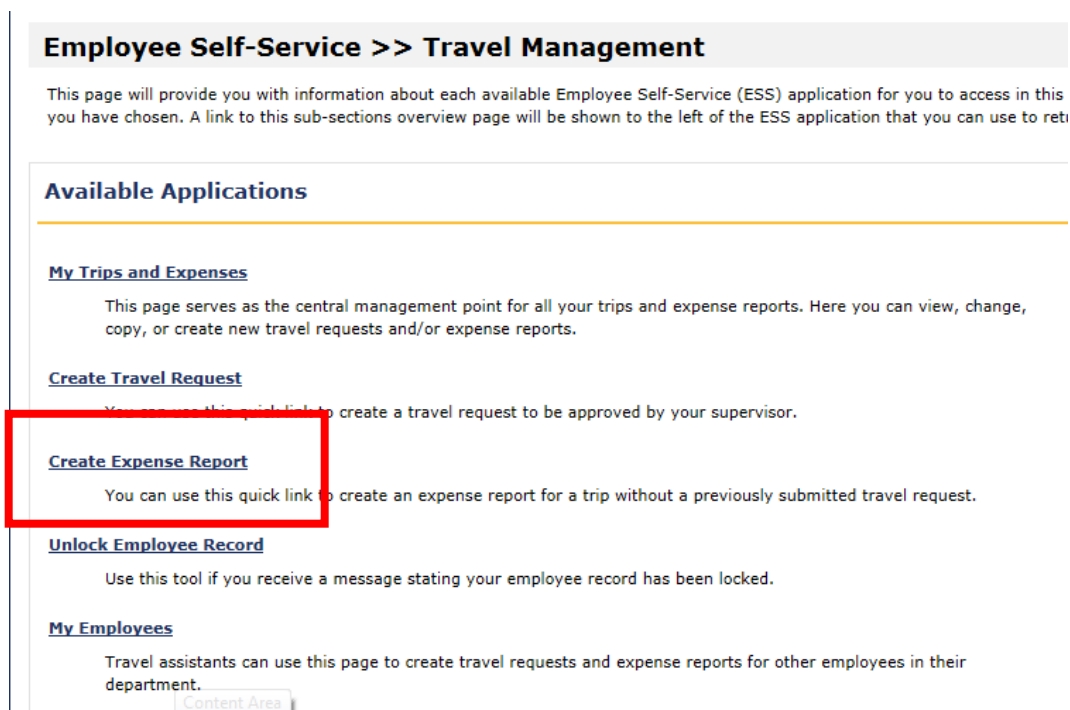


Travel Management - Submitting for Mileage in One Entry

Faculty who supervise student teachers, student nurses, and other clinical oversight often spend much of their time at off-site locations. Submitting for reimbursement using Travel Management can be cumbersome if mileage takes place over several different days. To enter mileage in an efficient manner for reimbursement, it is suggested that the mileage reimbursement for a period (month, quarter, semester) be entered in Travel Management (TM) as one entry for the entire mileage for the period and dated for the last day of the period. For audit purposes, the detailed miles driven by day (mileage log) is required and can simply be scanned and added as an attachment. In order to do so please simply take the following steps.

1. Log into TM and select Create Expense Report



Employee Self-Service >> Travel Management

This page will provide you with information about each available Employee Self-Service (ESS) application for you to access in this you have chosen. A link to this sub-sections overview page will be shown to the left of the ESS application that you can use to return to the overview page.

Available Applications

[My Trips and Expenses](#)
This page serves as the central management point for all your trips and expense reports. Here you can view, change, copy, or create new travel requests and/or expense reports.

[Create Travel Request](#)
You can use this quick link to create a travel request to be approved by your supervisor.

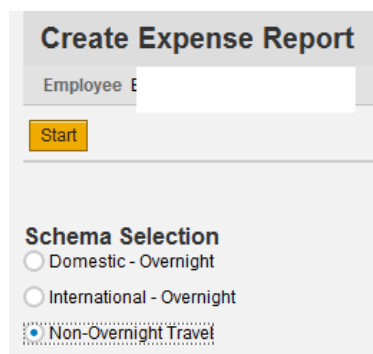
[Create Expense Report](#)
You can use this quick link to create an expense report for a trip without a previously submitted travel request.

[Unlock Employee Record](#)
Use this tool if you receive a message stating your employee record has been locked.

[My Employees](#)
Travel assistants can use this page to create travel requests and expense reports for other employees in their department.

Content Area

2. Choose the correct schema (non-overnight travel) and click



Create Expense Report

Employee E

Start

Schema Selection

Domestic - Overnight

International - Overnight

Non-Overnight Travel

3. Enter the general data, destination and additional information fields as necessary

Create Expense Report

1 → 2 → 3 → 4 →

General Data Enter Receipts Review and Send Completed

Employee Schema Non-Overnight Travel

< Previous Step Enter Receipts > Save Draft

✔ Check was successful

Calendar of Trips Attachments (0)

General Data

* Start Date: 01/04/2017 08:00

* End Date: 03/17/2017 16:30

Posting Date: 03/17/2017

Destination

* Trip Country: Standard Conus Rate, USA Trip Region: PA/E9 Erie, PA

* Destination: various clinical sites

Additional Destinations: No destinations entered

Additional Information

* Activity: Teaching Travel

* Reason: over-sight of BSN students at Erie area hospitals

Comment: mileage for the site visits

Cost Assignment: 100.00 % Cost Center 3511138100 (Nursing), Funds Center 3511138100 (Nursing)

Mileage

Total Distance: 0 Mile Enter Mileage Details

4. Save Draft
5. Click on the Enter Mileage Details button. The mileage data dialog box will launch
6. Enter the total miles, the last day of the period, and comments if necessary

ator
p

General Data **Mileage Details** General Data Enter Receipts Review

Employee Schema Non-Overnight Travel Start Date 01/04/2017

< Previous Step **Accept** Save Draft

Calendar of Trips

Total Distance Driven: Mile

Mileage Details

New Entry Copy Delete

Date	Miles Driven	Passengers	Start Location
02/28/2017	450	No passengers ▾	

Comment:

Accept Accept and New Entry Change Cost Assignment Copy Delete

< Previous Step **Accept** Save Draft

7. Click on the Accept button located at the top
8. This will summarize the mileage and bring you back to the General Data screen. Click Save Draft.

Employee Schema Non-Overnight Travel

< Previous Step Enter Receipts > Save Draft

Calendar of Trips Attachments (0)

General Data

* Start Date: 01/04/2017 08:00
 * End Date: 03/17/2017 16:30
 Posting Date: 03/17/2017

Destination

* Trip Country: Standard Conus Rate, USA Trip Region: PA/E9 Erie, PA
 * Destination: various clinical sites

Additional Destinations: No destinations entered

Additional Information

* Activity: Teaching Travel
 * Reason: over-sight of BSN students at Erie area hospitals
 Comment: mileage for the site visits
 Cost Assignment: 100.00 % Cost Center 3511138100 (Nursing), Funds Center 3511138100 (Nursing)

Mileage

Total Distance: 450 Mile Enter Mileage Details

9. You now need to add documentation that provides the detailed miles driven by day. This can simply be a paper log that is signed by the chair and scanned/added to the TER. Scan and save locally.

EDINBORO UNIVERSITY OF PENNSYLVANIA TRAVEL EXPENSE VOUCHER

PAGE 1 OF 1

FOR OFFICE USE ONLY

PRINT OR TYPE

UNIVERSITY PHONE NUMBER: 21053

DELIVER CHECK TO (STREET OR OFFICE ADDRESS): Erie, PA ZIP CODE: 16509

COST CENTER: NURSING CEN# 138100

ITINERARY				HOTEL	FOOD	TRANSPORTATION		MISCELLANEOUS EXPENSES			
PURPOSE	DATE	TIME (FROM / TO)	LIST LOCATIONS (FROM / TO)	NAME OF HOTEL & H.O. NUMBER	CASH YOU PAID	CASH YOU PAID	NAME OF CARRIER & T.O. NUMBER	FERS AUTO MILES	EXPLANATION	CASH	TOTAL
NURS 303 Clinical	2/6/12	0533 : 1057			\$	\$			Parking	7.50	7.50
"	2/7/12	0611 : 1205								6.75	6.75
"	2/13/12	0536 : 1313								7.50	7.50
"	2/20/12	0527 : 1329								6.75	6.75
CONDUCT 4	2/10/12	0619 : 1215								5.75	5.75
Faculty Evaluation	2/13/12	0600 : 0910								2.75	2.75
NURS 303 Clinical	2/27/12	0520 : 1302								7.50	7.50
"	2/28/12	0610 : 1307								6.75	6.75
TOTALS					\$	\$				81.25	57.25

COMMENTS

TRAVEL CLASSIFICATION

RECRUITING 40XX
 ADMINISTRATIVE 41XX
 PROFESSIONAL DEVELOPMENT 42XX

PERSONAL AUTO MILES AT _____ mi
 LESS TRAVEL ADVANCE #TA _____
 TOTAL REIMBURSEMENT CLAIMED \$ _____

TRAVELER SIGNATURE: *[Signature]* DATE: 2/28/12

SUPERVISOR WITH COST CENTER CONTROL CHECK BOX, SIGN AND DATE

COPY 1 - ACCOUNTS PAYABLE (White/Original with approvals and attached receipts)
 COPY 2 - SUPERVISOR
 COPY 3 - TRAVELER

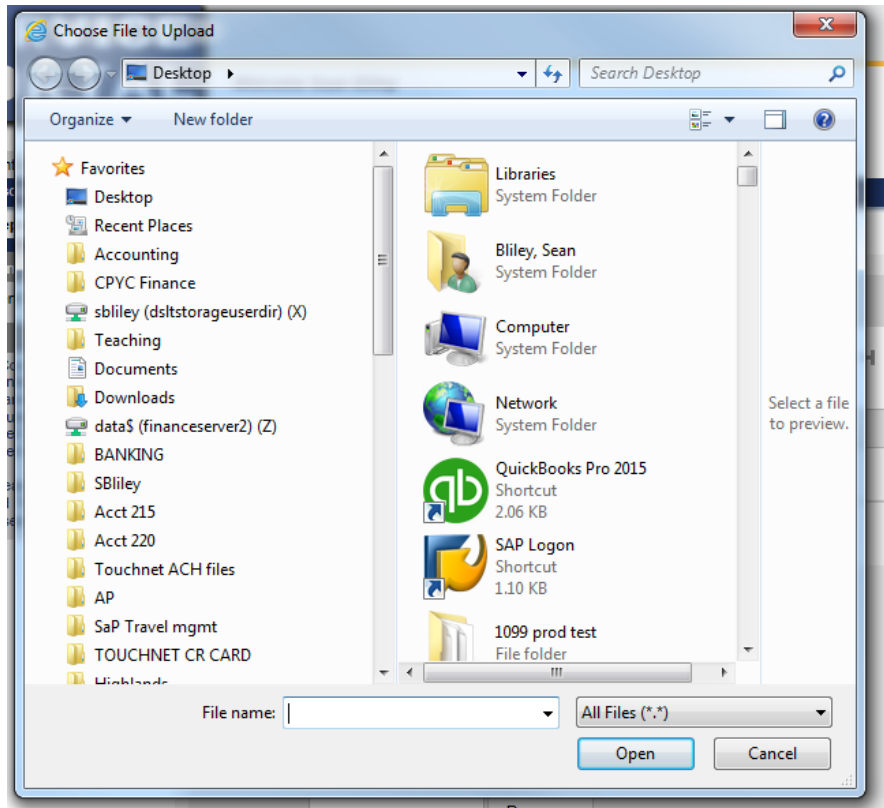
10. Click on the Attachment button

The screenshot shows the 'Create Expense Report' interface. At the top, there is a progress bar with four steps: 1. General Data (highlighted in blue), 2. Enter Receipts, 3. Review and Send, and 4. Completed. Below the progress bar, the 'Employee' field is empty, and the 'Schema' is set to 'Non-Overnight Travel'. There are three buttons: '< Previous Step', 'Enter Receipts >', and 'Save Draft'. Below these buttons, there are two tabs: 'Calendar of Trips' and 'Attachments (0)'. The 'Attachments (0)' tab is highlighted with a red box. Underneath, the 'General Data' section includes fields for '* Start Date' (01/04/2017, 08:00), '* End Date' (03/17/2017, 16:30), and 'Posting Date' (03/17/2017). The 'Destination' section includes '* Trip Country' (Standard Conus Rate, USA), 'Trip Region' (PA/E9 Erie), and '* Destination' (various clinical sites).

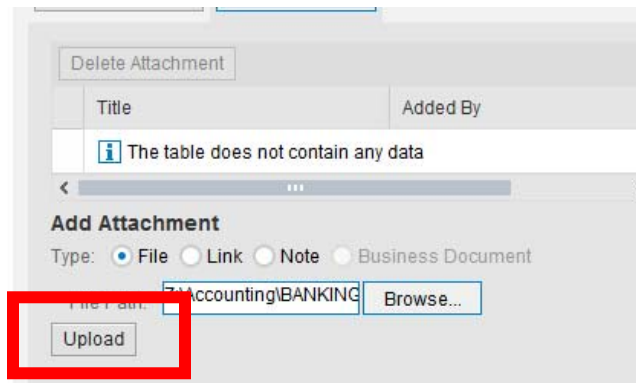
11. This will open the Attachment dialog box. Simply Click on the browse button and find the scanned log

The screenshot shows the 'Attachments (0)' dialog box. At the top, there are two tabs: 'Calendar of Trips' and 'Attachments (0)'. Below the tabs, there is a 'Delete Attachment' button. A table with columns 'Title' and 'Added By' is shown, but it contains no data, with a message: 'The table does not contain any data'. Below the table, there is a section titled 'Add Attachment'. It has a 'Type' field with radio buttons for 'File' (selected), 'Link', 'Note', and 'Business Document'. There is a 'File Path' input field and a 'Browse...' button, which is highlighted with a red box. At the bottom, there is an 'Upload' button.

12. This will launch the Choose File to Upload dialog box. Find and select the scanned log document saved earlier.



13. Click on the Upload button



14. The file will show as added. Click Save Draft.

15. If additional costs are to be added (e.g. parking fees), enter them under Enter Receipts. Click on Save Draft.
16. If everything is entered, click on Review and Send (located at the top)

17. If all travel costs are entered and receipts attached, submit the TER for approval by clicking the Save and Send for Approval radial button and click on **Save and Send for Approval**.
18. TM will confirm that the TER has been saved and sent for approval. The approval log will be populated on the Expense Form. To view the form and check on the status of the approval process click on the Display Expense Form button.

Change Expense Report (3500002634)



Employee Schema Non-Overnight Travel Start Date

< Previous Step

Save and Send for Approval

- ✔ Expense report 3500002634 was saved and sent for approval
- ✔ 100.00 % will be assigned acc. to trip costs assignment guidelines

Display Expense Form