



South Carolina Enterprise Information System

**MYSCEMPLOYEE
TRAVEL MANAGEMENT OVERVIEW
TV120**

STATE INFORMATION
TECHNOLOGY



SC BUDGET AND CONTROL BOARD

MySCEmployee Travel Overview



The Travel Management portion of MySCEmployee will provide employees, travel assistants and managers the ability to create, edit, submit and approve travel requests and expense reports.

Because a large number of our Staff travel, we will be reviewing the travel portion of SCEIS training material.

Differences between SC Housing and other Agencies

- In other State Agencies, Travel Assistants and Managers will process travel requests and expense reports for those employees who travel on an infrequent basis. These Travel Assistants will enter and process travel on behalf of employees. Here at the SC Housing Authority we have a large number of employees who travel regularly. These employees will be required to understand, submit and process their own trip requests and expense reports.

TOPICS and Notes



 **TRAVEL REQUESTS**

 **TRAVEL EXPENSE REPORTS**

TOPICS and Notes

TRAVEL REQUESTS REQUIRED FOR:

TRAVEL ADVANCE CASH

CG Cash Advance form must be imaged and attached to a completed Travel Request

Travel Expense Reports Notes:

Need to Be submitted on a weekly basis

Per CG, no more than one week per Expense Report

Per CG, Reports must be submitted within one month incurring Travel Expense

Receipts, etc must be imaged and attached

Out of State and In-State travel must be submitted on separate reports.

Use XEROX Copiers to image documentation

Course Learning Objectives

- Upon completion of this course, you should be able to:
 - Navigate MySCEmployee to Access the Travel Management Function
 - Create, Change and Delete a Travel Request
 - Create, Change and Delete a Travel Expense Report
 - View and Print a Travel Expense Report
 - Understand both SCEIS requirements and SC Housing Authority requirements for trip requests and expense reports

Course Overview

- ① **Lesson 1: MySCEmployee Travel Process Overview**
- ③ **Lesson 3: Creating a Travel Expense Report**
- ② **Lesson 2: Creating a Travel Request**
- ④ **Lesson 4: Changing, Copying or Deleting a Travel Request and/or Expense Report**
- ⑤ **Lesson 5: Approving Employee Travel Requests and Expense Reports**
- ⑥ **Course Summary**

Course Assignments

Role	Definition	Lessons
Employee	An employee traveling on official State business.	Lessons 1-4
Manager	A manager or supervisors with approval responsibilities for an employee traveling on official State business or an employee submitting expenses for reimbursement.	All Lessons



South Carolina Enterprise Information System

LESSON 1: Travel Process Overview

STATE INFORMATION
TECHNOLOGY



SC BUDGET AND CONTROL BOARD

SC BUDGET AND CONTROL BOARD

Lesson 1 Learning Objectives

- ➊ Upon completion of this lesson, you should be able to:
 - Access My Travel and Expenses
 - Understand the Various Actions Conducted in the My Travel and Expenses area of MySCEmployee Employee Self Service

Note: *Always navigate within the MySCEmployee website (utilize the tabs, links, etc.). Do not use the “Back” and “Forward” buttons on the Internet Explorer (I.E.) toolbar, as they can give atypical results*

MySCEmployee Login Page

1. Using your web browser (e.g. Internet Explorer) type <https://myscemployee.sc.gov>
2. Enter your User ID and Password in the areas indicated
3. Click the Log On button to be directed to the MySCEmployee Home Page

MySCEmployee
powered by **SCEIS**

Welcome South Carolina State Employees

User ID *
Password *

STATE INFORMATION TECHNOLOGY
BICB
SC BUDGET AND CONTROL BOARD

SCEIS Service Desk | FAQ | System Messages | Privacy & Security Policy | Legal |

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MySCEmployee Home Page

To access the main Employee Self Service page, click the blue Employee Self Service tab, located near the top of the page.

The screenshot shows the MySCEmployee home page. At the top left, it says "Welcome essuser1," followed by the "MySCEmployee" logo and "powered by SCEIS". On the right, there are links for "Help", "Personalize", and "Log Off". Below the header, there is a navigation bar with a "Welcome" tab and a blue "Employee Self-Service" tab, which is highlighted with a red box. Underneath, there are links for "Alerts and Information" and "Universal Worklist". On the right side of the page, there are links for "History", "Back", and "Forward". The main content area is divided into two columns. The left column has a blue header "Welcome to MySCEmployee" and a paragraph explaining the system's purpose. Below this is a "News Of Interest" section with three bullet points. The right column has a green header "Helpful Links" and a list of links including "SC.Gov", "Employee Insurance Program (EIP)", "Retirement Systems", "Office of Human Resources (OHR)", "Employee-E-News", "State Holidays", and "SCEIS". At the bottom right, there is a collage of images including the South Carolina State Capitol building, a sailboat, and palm trees.

Welcome essuser1, MySCEmployee powered by SCEIS Help | Personalize | Log Off

Welcome Employee Self-Service Alerts and Information | Universal Worklist | History Back Forward

Welcome to MySCEmployee

MySCEmployee is designed to empower employees by putting many day-to-day record keeping responsibilities directly in their hands. Through MySCEmployee state employees can, among other activities, enter and submit time for manager approval, access pay statements, maintain bank details for direct deposit, submit leave requests, view various quota balances, update mailing addresses, and search for other state employee's contact information.

News Of Interest

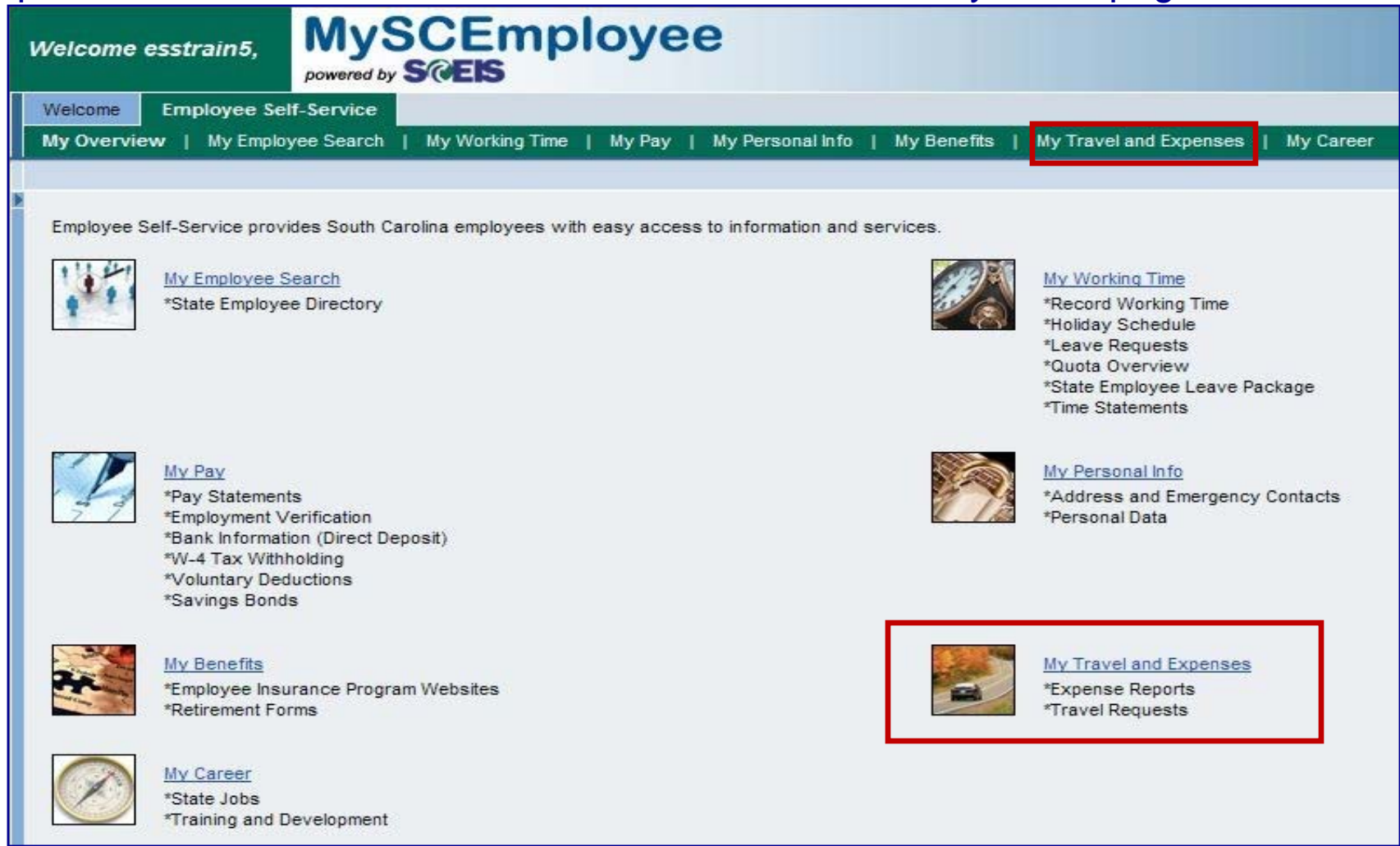
- **Note:** Employees who are new to MySCEmployee are encouraged to take the Employee Self Service (ESS) and Manager Self Service (MSS) (if appropriate) training prior to using the system. Be on the lookout for information from your respective agency's training team.
- **Be Sure to Verify Your Personal Information:** You are encouraged to review and verify your personal information, such as addresses, emergency contacts, social security number and date of birth soon after go-live.
- **Reminder:** MySCEmployee currently supports Internet Explorer versions 6 & 7. Version 8 is not yet supported by the system.

Helpful Links

- SC.Gov
- Employee Insurance Program (EIP)
- Retirement Systems
- Office of Human Resources (OHR)
- Employee-E-News
- State Holidays
- SCEIS

Area Page (Main Overview)

To access **My Travel and Expenses** functions, click “My Travel and Expenses” from either the submenu or from the main body of the page.










Welcome esstrain5, MySCEmployee
powered by SOEIS

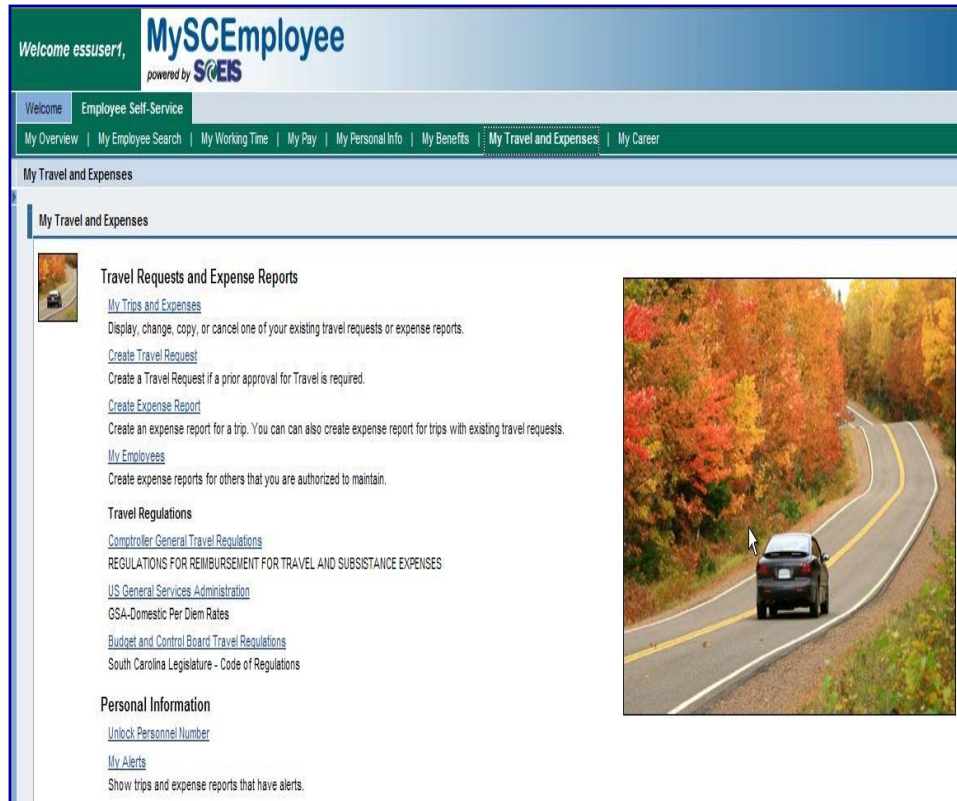
Welcome | **Employee Self-Service**

My Overview | My Employee Search | My Working Time | My Pay | My Personal Info | My Benefits | **My Travel and Expenses** | My Career

Employee Self-Service provides South Carolina employees with easy access to information and services.

 <p>My Employee Search *State Employee Directory</p>	 <p>My Working Time *Record Working Time *Holiday Schedule *Leave Requests *Quota Overview *State Employee Leave Package *Time Statements</p>
 <p>My Pay *Pay Statements *Employment Verification *Bank Information (Direct Deposit) *W-4 Tax Withholding *Voluntary Deductions *Savings Bonds</p>	 <p>My Personal Info *Address and Emergency Contacts *Personal Data</p>
 <p>My Benefits *Employee Insurance Program Websites *Retirement Forms</p>	 <p>My Travel and Expenses *Expense Reports *Travel Requests</p>
 <p>My Career *State Jobs *Training and Development</p>	

My Travel and Expenses



The screenshot displays the MySCEmployee portal interface. At the top, it says "Welcome essuser1, MySCEmployee powered by SC EIS". Below this is a navigation bar with "Employee Self-Service" selected. The main menu includes "My Overview", "My Employee Search", "My Working Time", "My Pay", "My Personal Info", "My Benefits", "My Travel and Expenses" (which is highlighted), and "My Career". The "My Travel and Expenses" section is expanded, showing a sub-menu with "Travel Requests and Expense Reports", "Travel Regulations", and "Personal Information". Under "Travel Requests and Expense Reports", there are links for "My Trips and Expenses", "Create Travel Request", "Create Expense Report", and "My Employees". Under "Travel Regulations", there are links for "Comptroller General Travel Regulations", "US General Services Administration", "GSA-Domestic Per Diem Rates", "Budget and Control Board Travel Regulations", and "South Carolina Legislature - Code of Regulations". Under "Personal Information", there are links for "Unlock Personnel Number" and "My Alerts". A small image of a car on a road is visible on the right side of the screenshot.

From the **My Travel and Expenses** overview page, employees can create, edit or delete a travel request and/or an expense report. Additionally an administrator, through the My Employees link, will be able to perform the same actions for select employees. Employees will also be able to access links to Comptroller General and the Budget Control Board's travel regulations, the U.S. General Services Administration, as well as view alerts and unlock their personnel number, if required.

Lesson 1 Summary

- 🔄 You should now be able to:
 - Access My Travel and Expenses
 - Understand the Various Actions Conducted in the My Travel and Expenses area of MySCEmployee Employee Self Service



South Carolina Enterprise Information System

LESSON 3: Creating an Expense Report

STATE INFORMATION
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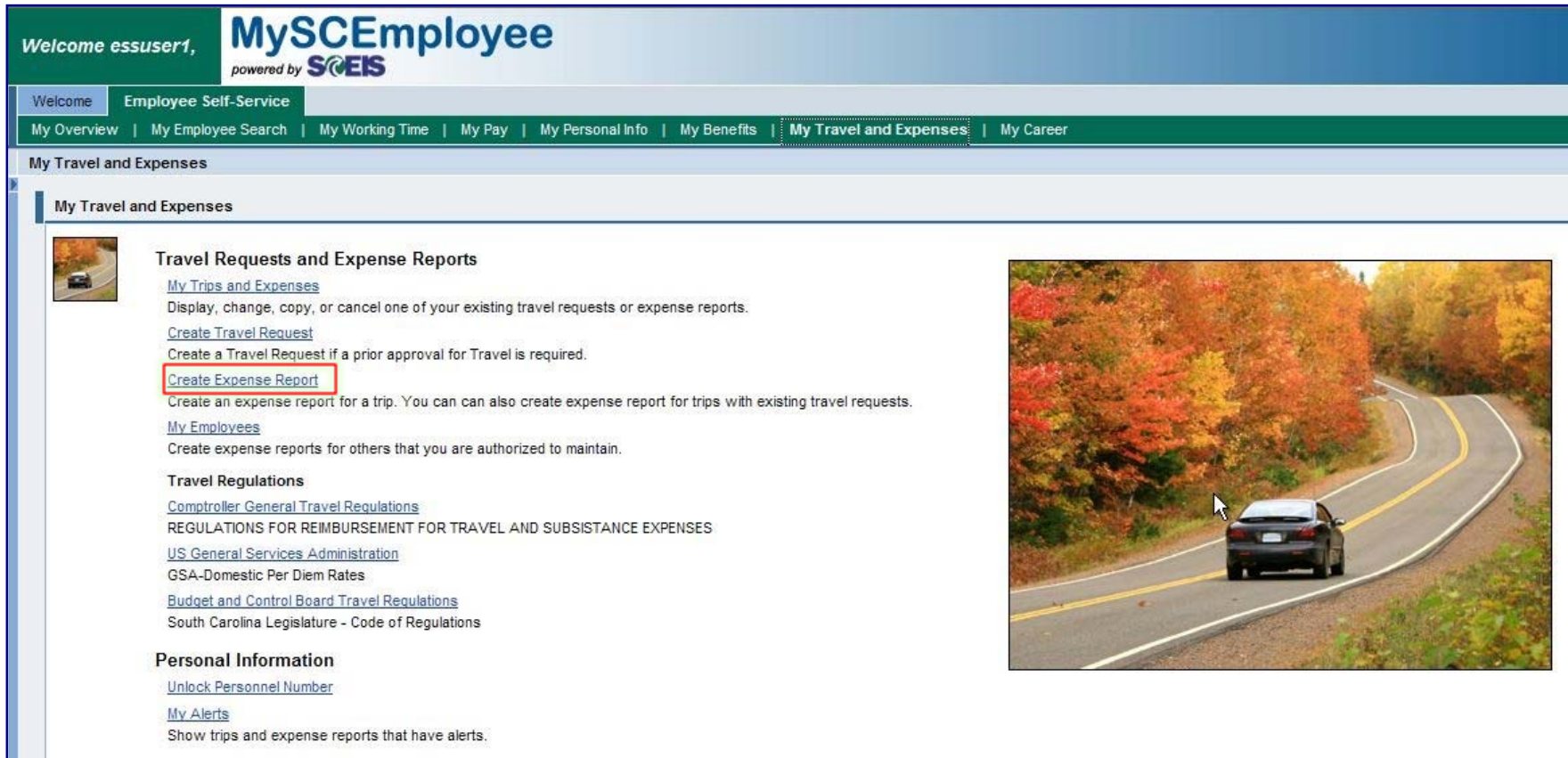
SC BUDGET AND CONTROL BOARD

Lesson 3 Learning Objectives

- Upon completion of this lesson, you should be able to:
 - Create a Travel Expense Report

My Travel and Expenses (Create Expense Report)

To create an Expense Report, from the **My Travel and Expenses** overview page, select the **Create Expense Report** link.



The screenshot displays the MySCEmployee web application interface. The top navigation bar includes a welcome message for 'essuser1', the 'MySCEmployee' logo, and the text 'powered by SOEIS'. Below this is a secondary navigation bar with tabs for 'Welcome', 'Employee Self-Service', and a main menu with links for 'My Overview', 'My Employee Search', 'My Working Time', 'My Pay', 'My Personal Info', 'My Benefits', 'My Travel and Expenses' (which is highlighted), and 'My Career'. The main content area is titled 'My Travel and Expenses' and contains a sub-section 'My Travel and Expenses' with a small car icon. The primary heading is 'Travel Requests and Expense Reports'. Under this heading, there are several links: 'My Trips and Expenses', 'Create Travel Request', 'Create Expense Report' (which is highlighted with a red box), and 'My Employees'. Below these links, there are instructions: 'Display, change, copy, or cancel one of your existing travel requests or expense reports.', 'Create a Travel Request if a prior approval for Travel is required.', and 'Create an expense report for a trip. You can also create expense report for trips with existing travel requests.' Further down, there is a 'Travel Regulations' section with links to 'Comptroller General Travel Regulations', 'US General Services Administration', and 'Budget and Control Board Travel Regulations'. At the bottom, there is a 'Personal Information' section with links for 'Unlock Personnel Number' and 'My Alerts'.

Welcome essuser1, MySCEmployee powered by SOEIS

Welcome Employee Self-Service

My Overview | My Employee Search | My Working Time | My Pay | My Personal Info | My Benefits | My Travel and Expenses | My Career

My Travel and Expenses

My Travel and Expenses

Travel Requests and Expense Reports

[My Trips and Expenses](#)
Display, change, copy, or cancel one of your existing travel requests or expense reports.

[Create Travel Request](#)
Create a Travel Request if a prior approval for Travel is required.

[Create Expense Report](#)
Create an expense report for a trip. You can also create expense report for trips with existing travel requests.

[My Employees](#)
Create expense reports for others that you are authorized to maintain.

Travel Regulations

[Comptroller General Travel Regulations](#)
REGULATIONS FOR REIMBURSEMENT FOR TRAVEL AND SUBSISTANCE EXPENSES


[US General Services Administration](#)
GSA-Domestic Per Diem Rates

[Budget and Control Board Travel Regulations](#)
South Carolina Legislature - Code of Regulations

Personal Information

[Unlock Personnel Number](#)

[My Alerts](#)
Show trips and expense reports that have alerts.



My Travel and Expenses (Create Expense Report)



When creating an expense report from a previously approved Travel Request, select the appropriate line in the table corresponding to the Travel Request. The table displays all past-dated Travel Requests for which no Expense Report was created. If a travel request is selected, most of the fields required to create an Expense Report will be carried over from the selected Travel Request. The steps that follow would be used if a Travel Request was never submitted. To begin creating an expense report, select the appropriate **Schema** (select **Domestic Official** for trips within the U.S., Canada and Puerto Rico; and select **International Official** for other countries) at the bottom of the page, then click the **Start** button.

Create Expense Report

Employee ALICE WONDERLAND (00008515)

|

Available Travel Requests / Plans

Trip Number	Trip Begins On	Trip Ends On	Destination	Trip Country	Reason
0000000184	09/02/2009	09/02/2009		US	sec
0000000175	09/01/2009	09/01/2009		US	security
0000000173	05/13/2009	05/13/2009	c	US	3 day notification deadline notify for state cg approver
0000000172	05/12/2009	05/12/2009	c	US	3 day deadline notification for agency ap approver
0000000171	05/11/2009	05/11/2009	c	US	3 day deadline notify for supervisor
0000000083	08/29/2009	08/29/2009	test future rejection	US	changed request #1 #2
0000000082	06/29/2009	06/29/2009	demo for work flow	US	
0000000081	05/09/2009	05/09/2009	columbia	US	trv request with advance and display form

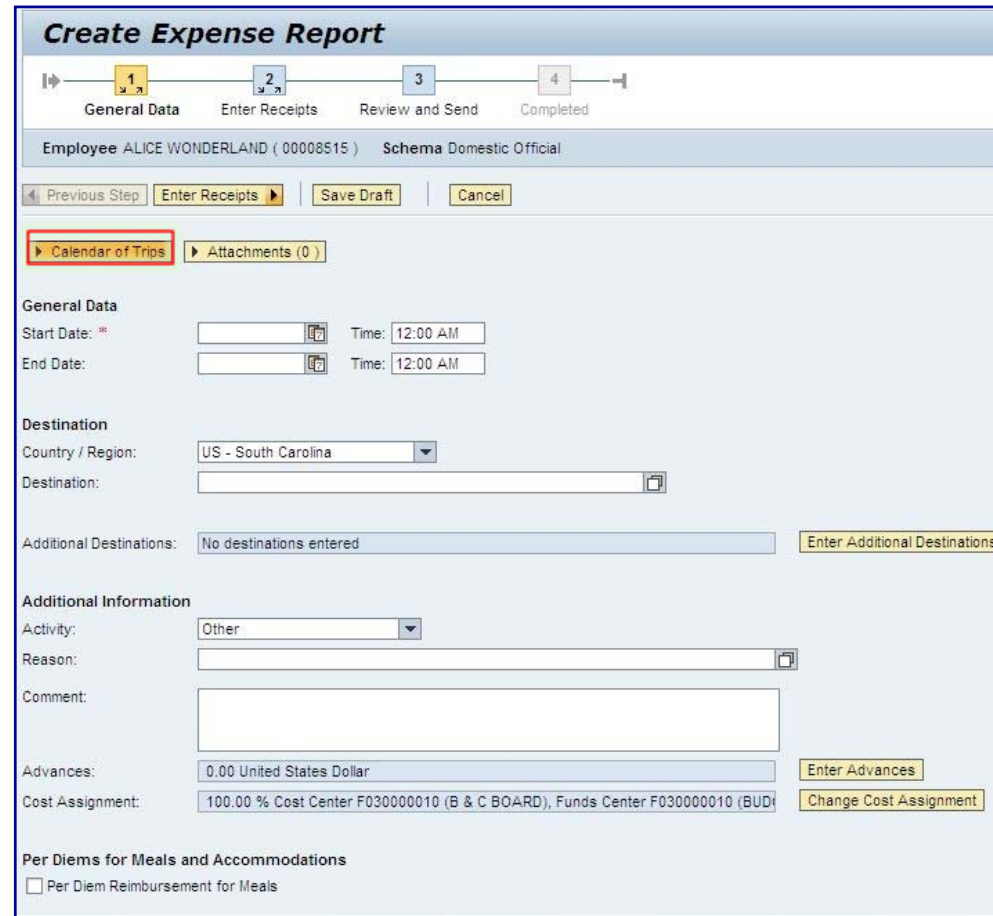
Schema Selection

Schema: *

Choose an Existing Travel Request If One Was Created

Create Expense Report (Calendar of Trips)

Clicking the start button on the previous screen brings up a new screen with a progress chart that walks employees through each step of creating an Expense Report. The first step, **General Data**, requires entering the same type of information required when creating a Travel Request. However, the process for creating an Expense Report requires additional information, such as per diem meal reimbursement, mileage claim details and the recording of receipts. To continue the process of creating an Expense Report, you are encouraged to click the **Calendar of Trips** button toward the top of the page. This link, when clicked, brings up a calendar, which displays other Travel Requests, and allows you to select travel Start and End Dates inside the calendar.



Create Expense Report

1 General Data | 2 Enter Receipts | 3 Review and Send | 4 Completed

Employee ALICE WONDERLAND (00008515) Schema Domestic Official

Previous Step | Enter Receipts | Save Draft | Cancel

Calendar of Trips | Attachments (0)

General Data
Start Date: * [] [] Time: 12:00 AM
End Date: [] [] Time: 12:00 AM

Destination
Country / Region: US - South Carolina
Destination: []

Additional Destinations: No destinations entered [Enter Additional Destinations](#)

Additional Information
Activity: Other
Reason: []
Comment: []

Advances: 0.00 United States Dollar [Enter Advances](#)

Cost Assignment: 100.00 % Cost Center F030000010 (B & C BOARD), Funds Center F030000010 (BUD) [Change Cost Assignment](#)

Per Diems for Meals and Accommodations
 Per Diem Reimbursement for Meals

Create Expense Report (Calendar of Trips)

The calendar shows existing Travel Requests in red and existing Expense Reports in yellow. You can also use the calendar to populate trip start and end dates. To do this, press your computer's shift key and click in the **Start Date** field, then click the corresponding start date in the calendar. Perform the same action for the trip's scheduled **End Date**. You can also manually enter trip start and end dates. Once the appropriate dates are entered, fill in the fields below the Start Date and End Date area.

Create Expense Report

1 2 3 4
General Data Enter Receipts Review and Send Completed

Employee ALICE WONDERLAND (00008515) Schema Domestic Official

Previous Step Enter Receipts Save Draft Cancel

Calendar of Trips Attachments (0)

May 2009							June 2009							July 2009							August 2009							September 2009									
Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su			
18	27	28	29	30	1	2	3	23	1	2	3	4	5	6	7	27	29	30	1	2	3	4	5	31	27	28	29	30	31	1	2	36	31	1	2	3	4
19	4	5	6	7	8	9	10	24	8	9	10	11	12	13	14	28	6	7	8	9	10	11	12	32	3	4	5	6	7	8	9	37	7	8	9	10	11
20	11	12	13	14	15	16	17	25	15	16	17	18	19	20	21	29	13	14	15	16	17	18	19	33	10	11	12	13	14	15	16	38	14	15	16	17	18
21	18	19	20	21	22	23	24	26	22	23	24	25	26	27	28	30	20	21	22	23	24	25	26	34	17	18	19	20	21	22	23	39	21	22	23	24	25
22	25	26	27	28	29	30	31	27	29	30	1	2	3	4	5	31	27	28	29	30	31	1	2	35	24	25	26	27	28	29	30	40	28	29	30	1	2
23	1	2	3	4	5	6	7	28	6	7	8	9	10	11	12	32	3	4	5	6	7	8	9	36	31	1	2	3	4	5	6	41	5	6	7	8	9

Travel Request Expense Report

General Data

Start Date: * 06/17/2009 Time: 8:00 AM

End Date: 06/18/2009 Time: 11:00 PM

Destination

Country / Region: US - South Carolina

Destination:

State your daily start and stop times in the Comment box under Additional Information. ACCOUNTING AND THE CG'S OFFICE need daily stop/start time to verify that you are entitled to lunch each day.



~~Use the "Enter Receipts" method for your lunch instead of the "Per Diem" when doing multiple day trips in a week~~

Additional Destinations:

Additional Information

Activity:

Reason:

Comment:

Advances:

Cost Assignment:

Per Diems for Meals and Accommodations

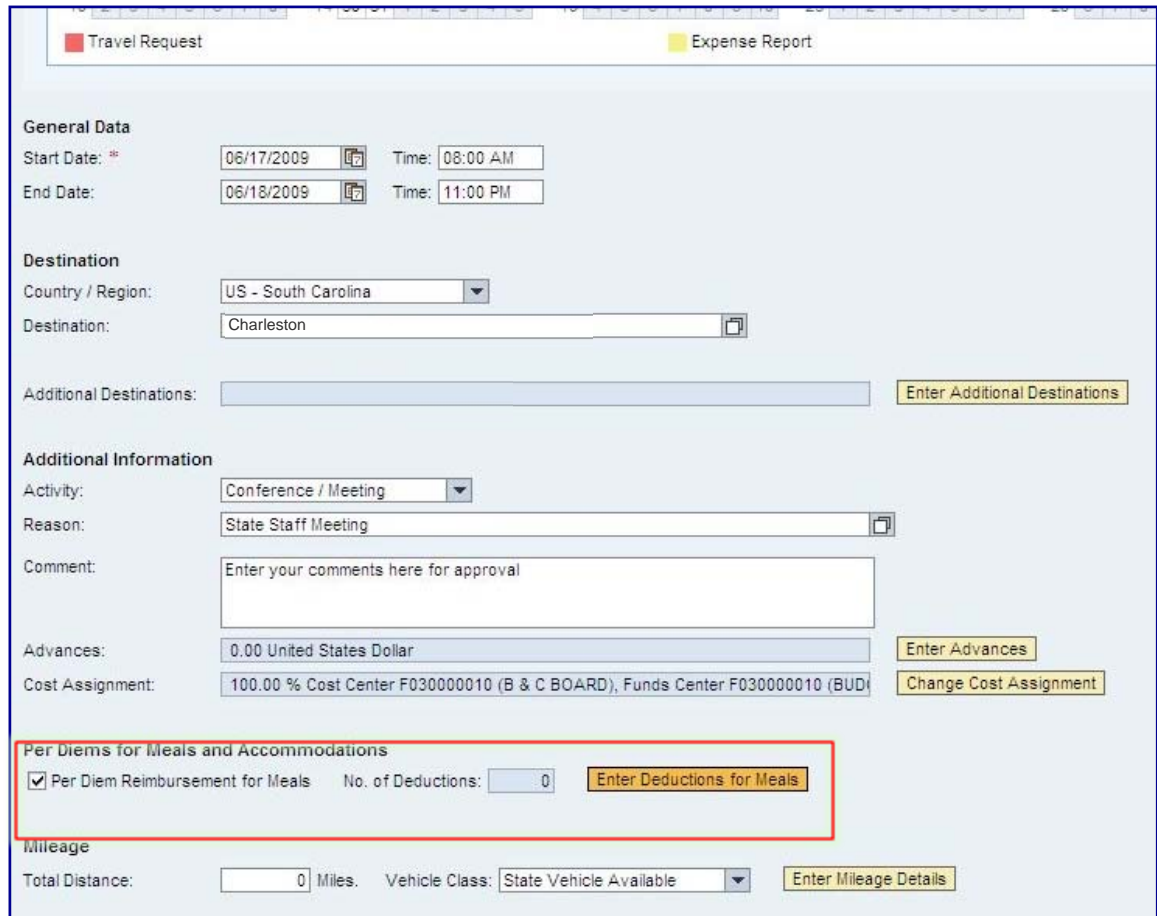
Per Diem Reimbursement for Meals

Create Expense Report (Per Diem Reimbursement for Meals)

After entering the trip start and end dates, enter information as required in the other fields.

Specifically:

- Start Time
- End Time
- County/Region
- Destination
- Additional Destinations
- Activity
- Reason
- Comment (if necessary)
- Change Cost Assignment (if necessary)



Travel Request Expense Report

General Data
Start Date: 06/17/2009 Time: 08:00 AM
End Date: 06/18/2009 Time: 11:00 PM

Destination
Country / Region: US - South Carolina
Destination: Charleston

Additional Destinations: [Enter Additional Destinations](#)

Additional Information
Activity: Conference / Meeting
Reason: State Staff Meeting

Comment:

Advances: 0.00 United States Dollar [Enter Advances](#)

Cost Assignment: 100.00 % Cost Center F030000010 (B & C BOARD), Funds Center F030000010 (BUD) [Change Cost Assignment](#)

Per Diems for Meals and Accommodations
 Per Diem Reimbursement for Meals No. of Deductions: 0 [Enter Deductions for Meals](#)

Mileage
Total Distance: 0 Miles. Vehicle Class: State Vehicle Available [Enter Mileage Details](#)

The following screenshots provide information on entering items such as deductions for meals, mileage and other receipts. Indicate if you qualify for per diem reimbursement for meals by clicking the box beside the per diem field. To proceed,

Click the [Enter Deductions for Meals](#) link, if appropriate.

Create Travel Request (Change Cost Assignment)

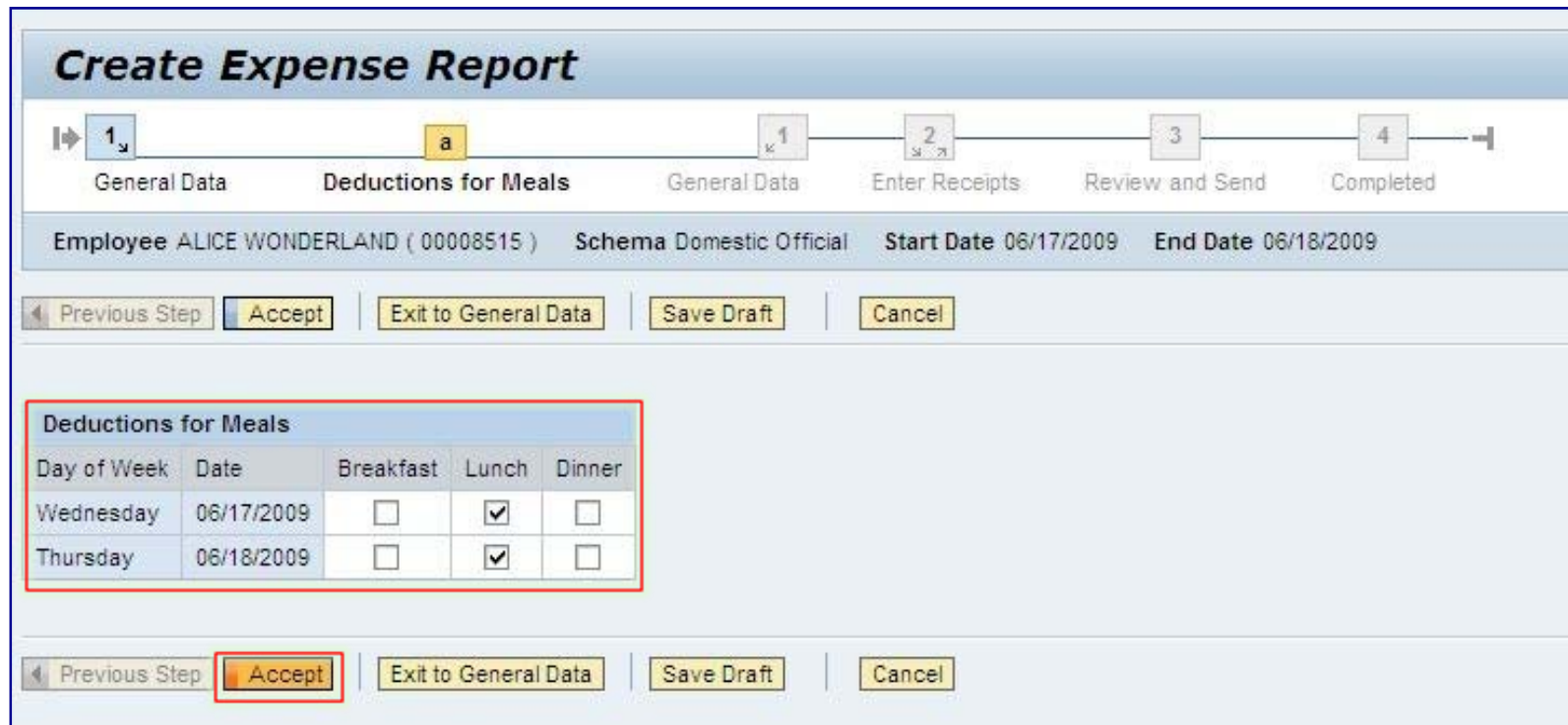
❗ Important Notice!

The system will assign all Expense Reports to the employee's payroll Cost Assignment or to the Cost Assignment used in the Travel Request (if there is a difference) by default. This may not be the accurate Cost Assignment, therefore it is the Employee's responsibility to verify the correct **Cost Assignment** is used. Please check with your Manager/Supervisor for the correct Cost Assignment information for each Expense Report.

Note: *The Accounts Payable Department **CANNOT** make changes to the Cost Assignment assigned to a Travel Request/Expense Report. If an incorrect Cost Assignment is used, the Travel Request/Expense Report will be sent back for corrections and may cause a delay in the reimbursement.*

Create Expense Report (Per Diem Reimbursement for Meals)

By selecting the Per Diem Reimbursement for Meals box, meals will be computed automatically by the system based on the start and end dates and times entered for the trip. Country/Region selected will determine the rates for both in-state and out-of-state travel. You can use deductions button if specific meals have been provided for which you will not be reimbursed. Once entered, click the **Accept** button.



Create Expense Report

1 → a → 1 → 2 → 3 → 4 →

General Data Deductions for Meals General Data Enter Receipts Review and Send Completed

Employee ALICE WONDERLAND (00008515) Schema Domestic Official Start Date 06/17/2009 End Date 06/18/2009

← Previous Step **Accept** Exit to General Data Save Draft Cancel

Deductions for Meals				
Day of Week	Date	Breakfast	Lunch	Dinner
Wednesday	06/17/2009	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Thursday	06/18/2009	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

← Previous Step **Accept** Exit to General Data Save Draft Cancel

Create Expense Report (Mileage)

The Comptroller General requires that mileage be entered detailing mileage to the city/town, vicinity miles and return miles for each day traveled. To get started entering mileage, click the **Enter Mileage Details** button.

On the highlighted row, enter date, miles, start location and end location. If a personal vehicle was used for the travel when a State vehicle was available then “State Vehicle Available” should be chosen in the **Vehicle Class** field. If no State vehicle was available then “Personal Vehicle” should be identified. Vehicle class determines the reimbursement rate. To add more lines, click on New Entry button. Once all the information is entered, click on Accept button.

Calendar of Trips

ENTER TO CLAIM MILEAGE ONLY IF YOU HAVE USED PERSONAL VEHICLE FOR STATE'S BUSINESS.
Select 'State Vehicle Available' option when State Vehicle was available to use but not used.
Select 'Personal Vehicle' option when State Vehicle was NOT available.

Total Distance Driven: Miles

Mileage Details

Date	Miles Driven	Start Location	End Location
09/22/2009	125	Columbia	Charleston
09/22/2009	125	Charleston	Columbia

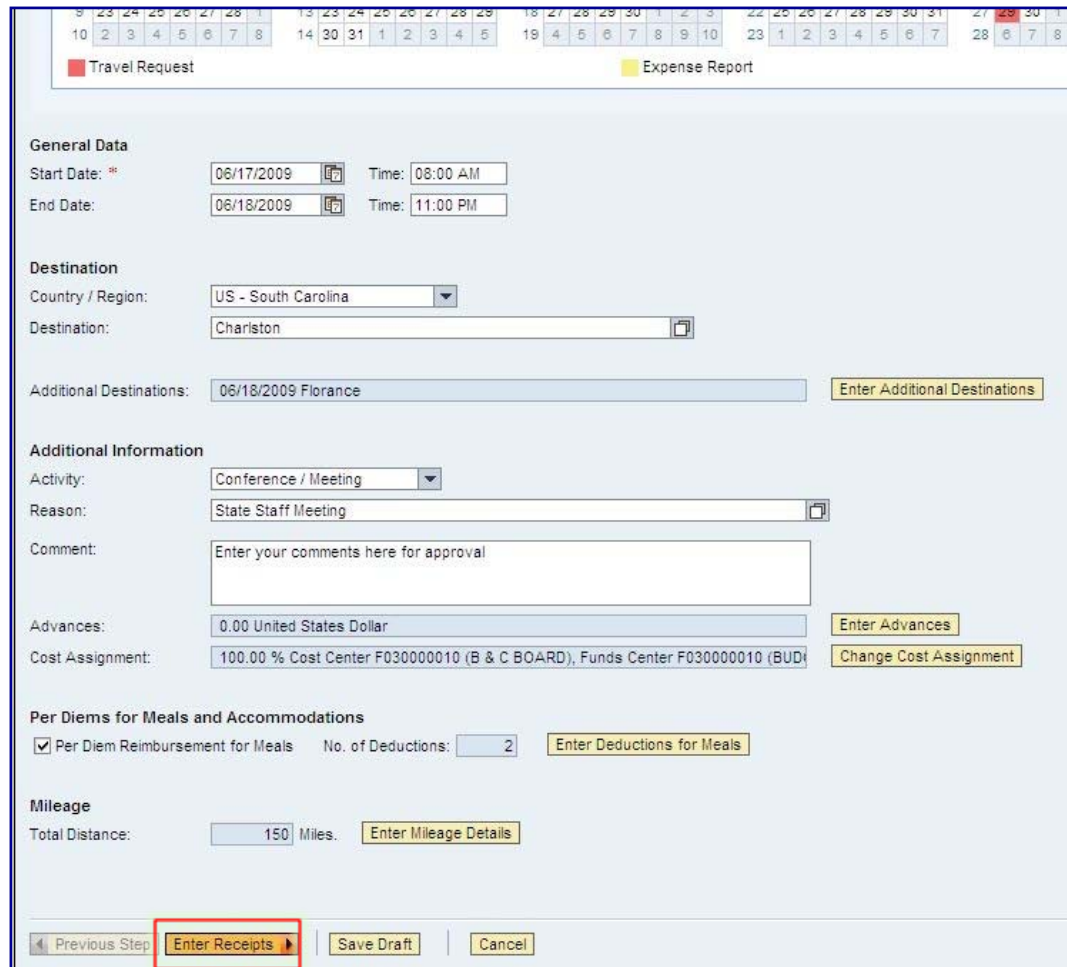
Vehicle Class:

License Plate:

Comment:

My Travel and Expenses (Create Expense Report)

To request reimbursement for other types of expenses, click the **Enter Receipts** button on the bottom of the page. Be sure to click on **Save Draft** button to save your work.



Travel Request Expense Report

General Data
Start Date: * 06/17/2009 Time: 08:00 AM
End Date: 06/18/2009 Time: 11:00 PM

Destination
Country / Region: US - South Carolina
Destination: Charleston
Additional Destinations: 06/18/2009 Florence Enter Additional Destinations

Additional Information
Activity: Conference / Meeting
Reason: State Staff Meeting
Comment: Enter your comments here for approval

Advances: 0.00 United States Dollar Enter Advances
Cost Assignment: 100.00 % Cost Center F030000010 (B & C BOARD), Funds Center F030000010 (BUD) Change Cost Assignment

Per Diems for Meals and Accommodations
 Per Diem Reimbursement for Meals No. of Deductions: 2 Enter Deductions for Meals

Mileage
Total Distance: 150 Miles. Enter Mileage Details

Previous Step **Enter Receipts** Save Draft Cancel

My Travel and Expenses (Create Expense Report)



The Comptroller General requires that each expense be broken down and listed by each day it was incurred. Add as many entries as necessary by clicking the New Entry button, and selecting the appropriate expense type from the dropdown menu. Once entered, click the **Accept** button. Remember to save your work by clicking on **Save Draft** button.

Change Expense Report (212)

1 General Data 2 Enter Receipts 3 Review and Send 4 Completed

Employee ALICE WONDERLAND (00008515) Schema Domestic Official Start Date 06/17/2009 End Date 06/18/2009

Previous Step Review Save Draft Cancel

Scanned Receipts (0)

Receipts in This Expense Report

New Entry Copy Delete

No.	Status	Expense Type	Receipt Amount	Receipt Currency	Receipt Date	Amount	Local Currency	Short Info	Paper Receipt
001	◇	LODGING	50.00	United States Dollar	06/17/2009	0.00	United States Dollar		<input checked="" type="checkbox"/>

From Date: To Date:

Number:

Description: *

Location: * Country / Region:

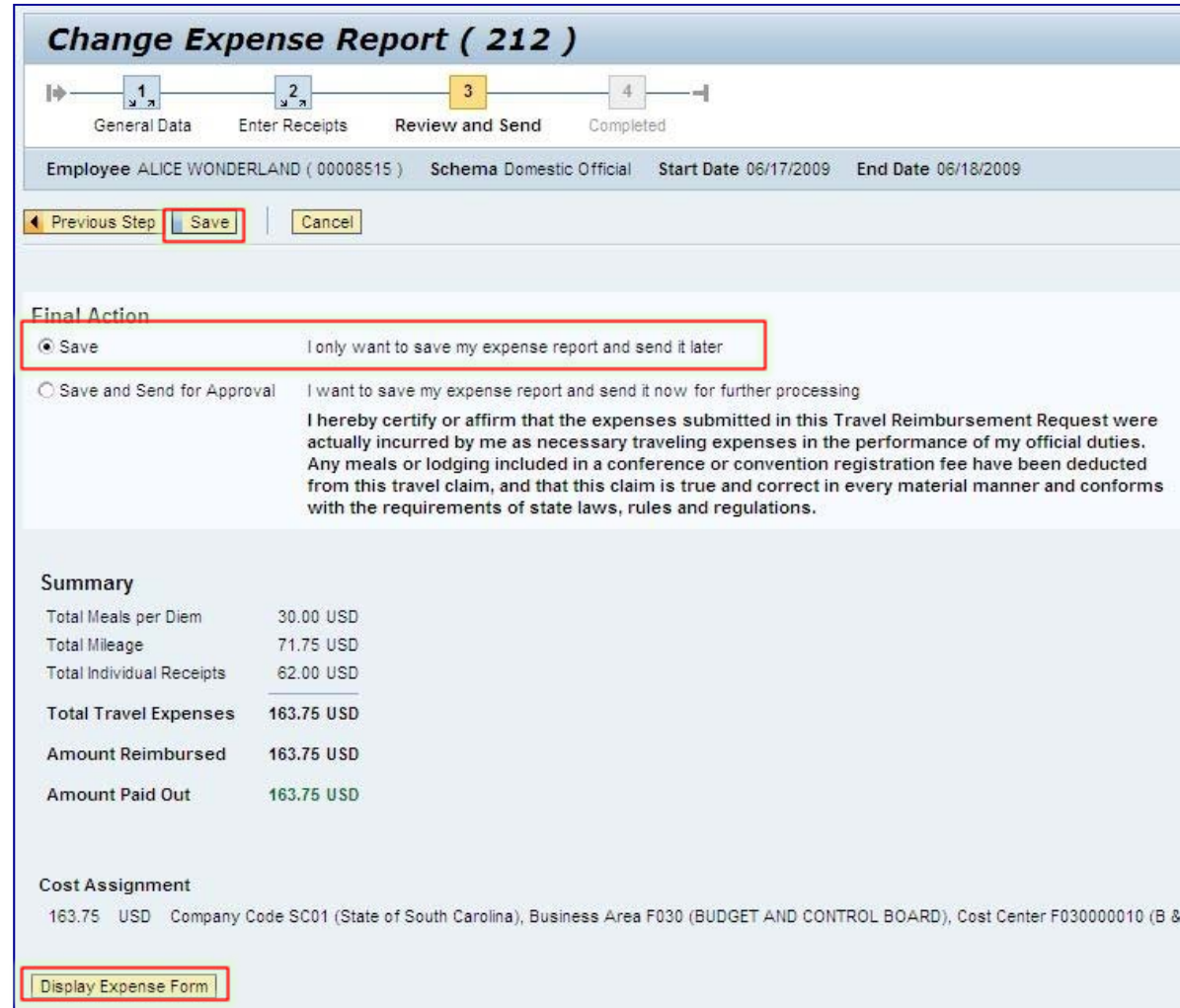
Business Purpose:

Comment:

Accept Accept and New Entry Change Cost Assignment Enter Itemization Check Copy Delete

Create Expense Report (Save)

If the expense report is ready for submission you should print the report by clicking the **Display Expense Form** button prior submitting the document. Then should you use the **Save and Send for Approval** button. Attach any required documents (e.g. receipts) to the printed report and scan them at one of the Multifunction Printer/Copiers located thought out the agency. You should receive an email notification when your documents have been imaged.



Change Expense Report (212)

1 2 3 4
General Data Enter Receipts Review and Send Completed

Employee ALICE WONDERLAND (00008515) Schema Domestic Official Start Date 06/17/2009 End Date 06/18/2009

Previous Step **Save** Cancel

Final Action

Save I only want to save my expense report and send it later

Save and Send for Approval I want to save my expense report and send it now for further processing

I hereby certify or affirm that the expenses submitted in this Travel Reimbursement Request were actually incurred by me as necessary traveling expenses in the performance of my official duties. Any meals or lodging included in a conference or convention registration fee have been deducted from this travel claim, and that this claim is true and correct in every material manner and conforms with the requirements of state laws, rules and regulations.

Summary

Total Meals per Diem	30.00 USD
Total Mileage	71.75 USD
Total Individual Receipts	62.00 USD
Total Travel Expenses	163.75 USD
Amount Reimbursed	163.75 USD
Amount Paid Out	163.75 USD

Cost Assignment

163.75 USD Company Code SC01 (State of South Carolina), Business Area F030 (BUDGET AND CONTROL BOARD), Cost Center F030000010 (B &)

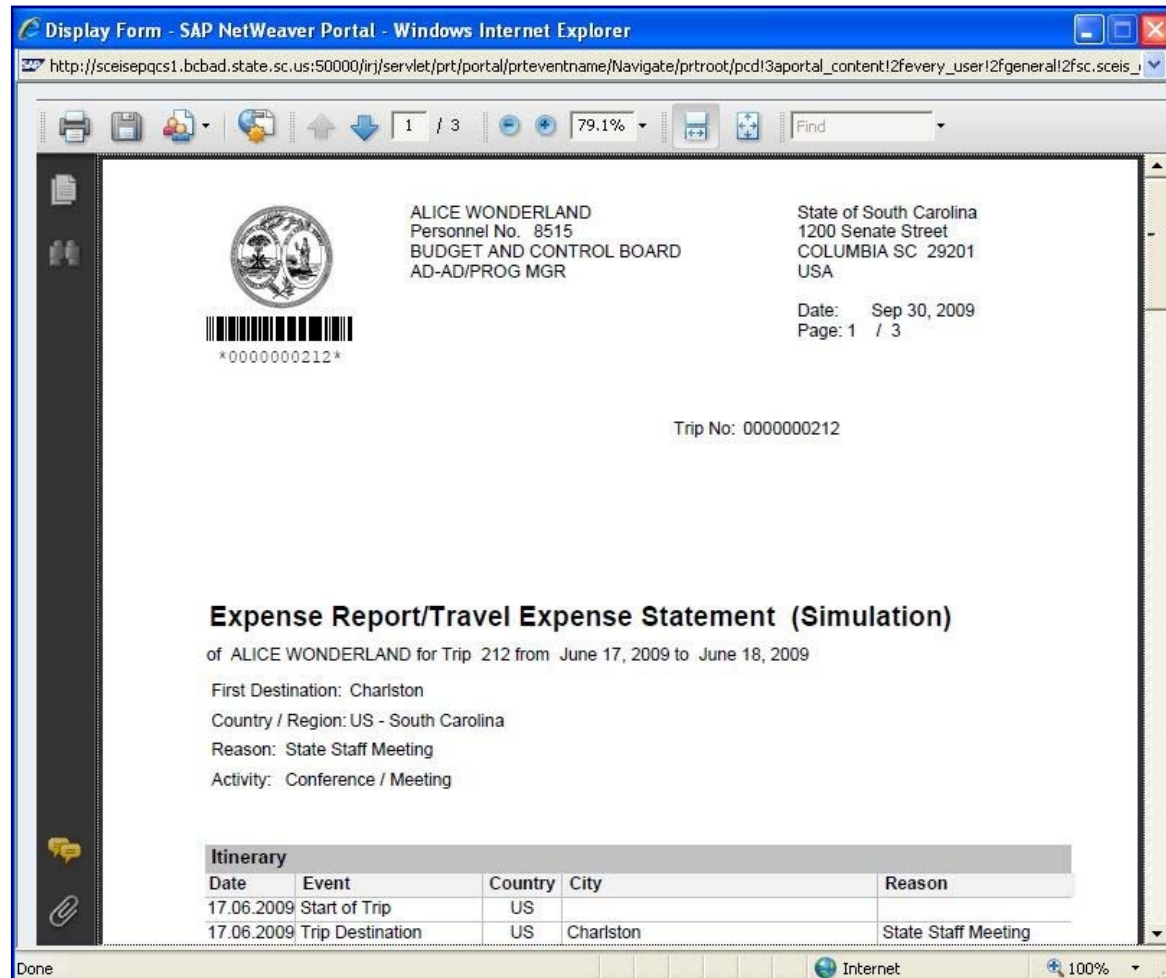
Display Expense Form

Create Expense Report (Display Expense Report)



Your coversheet for your expense report will look like the image to the right. After viewing, printing or saving the file you can simply click the X in the upper right-hand corner to close the window.

If you have receipts to attach to your expense report, print this report to scan on top of your receipts. If you have do not have receipts to include you may save and submit the report without scanning the document.



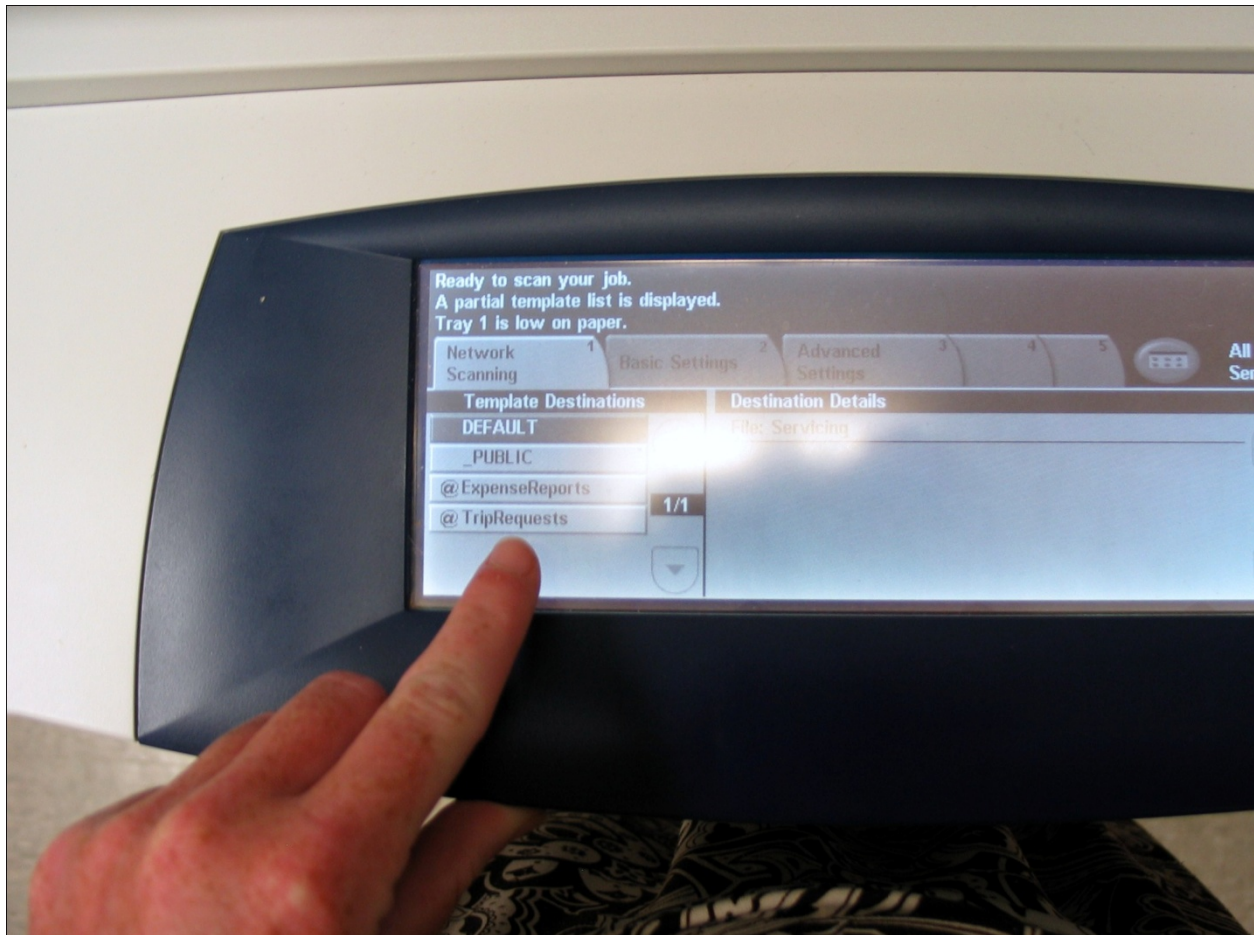
Using MFPs for Attaching Images



Using MFPs for Attaching Images



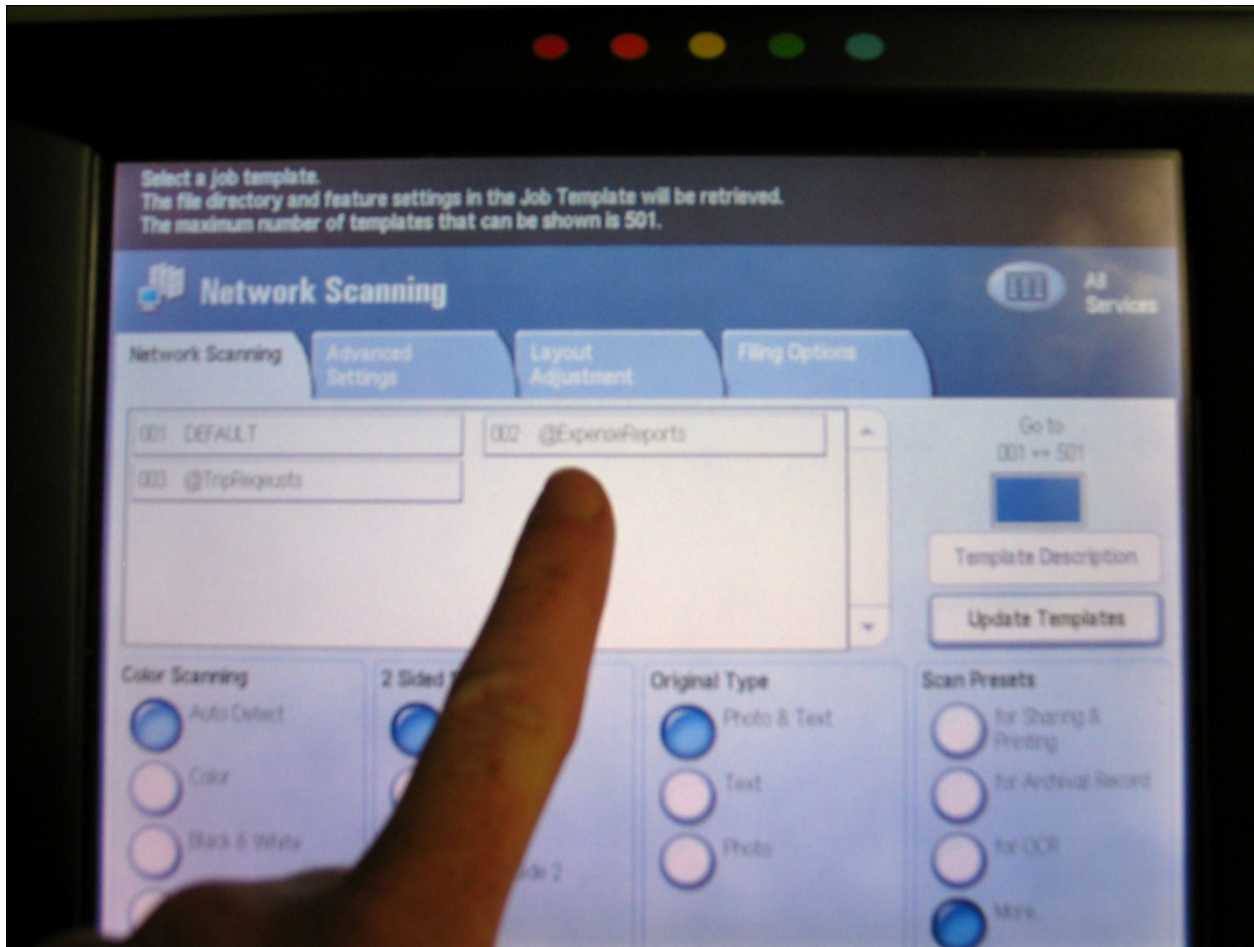
Using MFPs for Attaching Images



Using MFPs for Attaching Images



Using MFPs for Attaching Images



My Travel and Expenses (Create Expense Report)

As indicated below, the **Save and Send for Approval** button is the last step in submitting an Expense Report.

Change Expense Report (212)

1 2 3 4
General Data Enter Receipts Review and Send Completed

Employee ALICE WONDERLAND (00008515) Schema Domestic Official Start Date 06/17/2009 End Date 06/18/2009

Previous Step Save and Send for Approval Exit

Expense report 000000212 was saved
 100.00 % will be assigned acc. to trip costs assignment guidelines


Display Expense Form

Previous Step Save and Send for Approval Exit

Notifications

Notifications:

Notifications are sent to the notifications section of the employees Universal Worklist.



The screenshot shows the MySCEmployee interface for user Amanda Porter. The main navigation bar includes 'Welcome Amanda Porter', 'MySCEmployee powered by SOEIS', and 'Employee Self-Service'. The 'Universal Worklist' section is active, with sub-tabs for 'Tasks', 'Alerts', 'Notifications (2)', and 'Tracking'. The 'Notifications (2)' tab is selected, showing a list of notifications. The 'Show:' dropdown is set to 'All Notifications (2)'. The notification list has two entries, both from the 'Workflow System'.

Subject	From
Trip 0000001722 of AMANDA L PORTER rejected.	Workflow System
Trip 0000001575 for AMANDA L PORTER rejected.	Workflow System

Lesson 3 Summary

- You should now be able to:
 - Create a Travel Expense Report



South Carolina Enterprise Information System

LESSON 2: Creating a Travel Request

STATE INFORMATION
TECHNOLOGY



SC BUDGET AND CONTROL BOARD

Lesson 2 Learning Objectives

- ① Upon completion of this lesson, you should be able to:
 - Understand the differences between a typical trip request and Training/Conference Request
 - How to process out of State trip requests
 - When and how often to submit trip requests
 - How to create a trip request in SCEIS

Agency Requirements

- ➊ Prior to creating a trip request in SCEIS the following should be taken into consideration:
 - Trip Requests are required only for Cash Advances
 - To obtain a Travel Advance, a Trip Request must be submitted at least 21 days prior to the travel date.

My Travel and Expenses (Create Travel Request)



To create a travel request, from the **My Travel and Expenses** overview page, select the **Create Travel Request** link.

The screenshot shows the MySCEmployee web application interface. At the top, there is a navigation bar with the following links: Welcome, Employee Self-Service, My Overview, My Employee Search, My Working Time, My Pay, My Personal Info, My Benefits, My Travel and Expenses (highlighted), and My Career. Below the navigation bar, the main content area is titled "My Travel and Expenses" and contains the following sections:

- Travel Requests and Expense Reports**
 - [My Trips and Expenses](#)
Display, change, copy, or cancel one of your existing travel requests or expense reports.
 - [Create Travel Request](#) (highlighted with a red box)
Create a Travel Request if a prior approval for Travel is required.
 - [Create Expense Report](#)
Create an expense report for a trip. You can also create expense report for trips with existing travel requests.
 - [My Employees](#)
Create expense reports for others that you are authorized to maintain.
- Travel Regulations**
 - [Comptroller General Travel Regulations](#)
REGULATIONS FOR REIMBURSEMENT FOR TRAVEL AND SUBSISTANCE EXPENSES
 - [US General Services Administration](#)
GSA-Domestic Per Diem Rates
 - [Budget and Control Board Travel Regulations](#)
South Carolina Legislature - Code of Regulations
- Personal Information**
 - [Unlock Personnel Number](#)
 - [My Alerts](#)
Show trips and expense reports that have alerts.

On the right side of the screenshot, there is a photograph of a car driving on a winding road through a forest with vibrant autumn foliage. A mouse cursor is pointing at the car.

My Travel and Expenses (Create Travel Request)

Similar to other transactions within the MySCEmployee, at the top of **Create Travel Request** page there is a progress chart that walks employees through each step of travel request process. The first step, **General Data**, requires specific information, such as **Start Date**, **End Date**, **Start Time**, **End Time**, **Country/Region**, **Destination**, **Additional Destinations** (if applicable), **Activity**, **Reason**, **Estimated Costs**, **Advances** (if applicable) and **Cost Assignment Changes** (if applicable). Once the required information is submitted, the next step is to click the **Review** button on the bottom of the page. Note: Each page allows you to **Save Draft**. You should use the save draft function frequently to avoid losing any work.

Create Travel Request

1 General Data 2 Review and Send 3 Completed

Employee ALICE WONDERLAND (00008515)

Previous Step Review Save Draft Cancel

Calendar of Trips Attachments (0)

General Data

Start Date: ** Time: 12:00 AM
End Date: Time: 12:00 AM

Destination

Country / Region: US - South Carolina
Destination:

Additional Destinations: No destinations entered Enter Additional Destinations

Additional Information

Activity: Other
Reason:

Estimated Costs: ** 0.00 USD
Comment:

Advances: 0.00 United States Dollar Enter Advances
Cost Assignment: 100.00 % Cost Center F030000010 (B & C BOARD), Funds Center F030000010 (BUD) Change Cost Assignment

Previous Step Review Save Draft Cancel

My Travel and Expenses (Create Travel Request)

Notice the **Calendar of Trips** button toward the top of the page. This link, when clicked, brings up a calendar, which displays other travel requests, and allows you to select travel Start and End Dates inside the calendar.

Create Travel Request

1 General Data 2 Review and Send 3 Completed

Employee ALICE WONDERLAND (00008515)

Previous Step Review Save Draft Cancel

Calendar of Trips Attachments (0)

General Data
Start Date: ** [] Time: 12:00 AM
End Date: [] Time: 12:00 AM

Destination
Country / Region: US - South Carolina
Destination: []

Additional Destinations: No destinations entered [Enter Additional Destinations](#)

Additional Information
Activity: Other
Reason: []
Estimated Costs: ** 0.00 USD
Comment: []

Advances: 0.00 United States Dollar [Enter Advances](#)
Cost Assignment: 100.00 % Cost Center F030000010 (B & C BOARD), Funds Center F030000010 (BUD) [Change Cost Assignment](#)

Previous Step Review Save Draft Cancel

Create Travel Request (Calendar of Trips)

The calendar shows existing travel requests in red and existing expense reports in yellow. You can also use the calendar to populate trip start and end dates. To do this, press the shift key on the keyboard and click the **Start Date** field, then click the corresponding start date in the calendar. Perform the same action for the trip's scheduled **End Date**. You can also manually enter trip start and end dates. Once the appropriate dates are entered, fill in the fields below the Start Date and End Date area.

Create Travel Request

1 2 3
General Data Review and Send Completed

Employee ALICE WONDERLAND (00008515)

Previous Step Review Save Draft Cancel

Calendar of Trips Attachments (0)

September 2009							October 2009							November 2009							December 2009							January 2010												
Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su						
36	31	1	2	3	4	5	6	40	28	29	30	1	2	3	4	44	26	27	28	29	30	31	1	49	30	1	2	3	4	5	6	53	28	29	30	31	1	2	3	
37	7	8	9	10	11	12	13	41	5	6	7	8	9	10	11	45	2	3	4	5	6	7	8	50	7	8	9	10	11	12	13	54	4	5	6	7	8	9	10	
38	14	15	16	17	18	19	20	42	12	13	14	15	16	17	18	46	9	10	11	12	13	14	15	51	14	15	16	17	18	19	20	55	11	12	13	14	15	16	17	
39	21	22	23	24	25	26	27	43	19	20	21	22	23	24	25	47	16	17	18	19	20	21	22	52	21	22	23	24	25	26	27	56	18	19	20	21	22	23	24	
40	28	29	30	1	2	3	4	44	26	27	28	29	30	31	1	48	23	24	25	26	27	28	29	53	28	29	30	31	1	2	3	57	25	26	27	28	29	30	31	
41	5	6	7	8	9	10	11	45	2	3	4	5	6	7	8	49	30	1	2	3	4	5	6	54	1	4	5	6	7	8	9	10	58	1	2	3	4	5	6	7

Travel Request Expense Report

General Data

Start Date: * Time: 12:00 AM

End Date: Time: 12:00 AM

Note: Additional Fields Appear Below...

Create Travel Request (Calendar of Trips)



After entering the trip start and end dates, enter information as required in the other fields.

Specifically:

- Start Time
- End Time
- County/Region
- Destination
- Additional Destinations (if necessary)
- Activity
- Reason
- Estimated Cost
- Comment (if necessary)
- Advance (If required)
- Change Cost Assignment (if necessary)

Note: The next slides show how to Enter Additional Destinations and Advances.

The screenshot displays the 'Create Travel Request' form. At the top, there is a calendar view for October 2009, November 2009, December 2009, January 2010, and February 2010. A red square indicates the 'Travel Request' date (October 20, 2009), and a yellow square indicates the 'Expense Report' date (October 22, 2009).

General Data

Start Date: * 10/20/2009 Time: 07:00 AM
 End Date: 10/22/2009 Time: 09:00 PM

Destination

Country / Region: US - South Carolina
 Destination: Charleston

Additional Destinations: 10/21/2009 Florence

Additional Information

Activity: Conference / Meeting
 Reason: To attend buyers conference
 Estimated Costs: * 300.00 USD
 Comment: Enter comments here

Advances: 200.00 United States Dollar
 Cost Assignment: 100.00 % Cost Center F030000010 (B & C BOARD), Funds Center F030000010 (BUD)

Navigation: Previous Step

Create Travel Request (Enter Additional Destinations)



Click the **Enter Additional Destinations** button and add required information.

October 2009							November 2009							December 2009							January 2010							February 2010											
Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su					
40	28	29	30	1	2	3	4	44	26	27	28	29	30	31	1	49	30	1	2	3	4	5	6	53	28	29	30	31	1	2	3	6	1	2	3	4	5	6	7
41	5	6	7	8	9	10	11	45	2	3	4	5	6	7	8	50	7	8	9	10	11	12	13	1	4	5	6	7	8	9	10	7	8	9	10	11	12	13	14
42	12	13	14	15	16	17	18	46	9	10	11	12	13	14	15	51	14	15	16	17	18	19	20	2	11	12	13	14	15	16	17	8	15	16	17	18	19	20	21
43	19	20	21	22	23	24	25	47	16	17	18	19	20	21	22	52	21	22	23	24	25	26	27	3	18	19	20	21	22	23	24	9	22	23	24	25	26	27	28
44	26	27	28	29	30	31	1	48	23	24	25	26	27	28	29	53	28	29	30	31	1	2	3	4	25	26	27	28	29	30	31	10	1	2	3	4	5	6	7
45	2	3	4	5	6	7	8	49	30	1	2	3	4	5	6	1	4	5	6	7	8	9	10	5	1	2	3	4	5	6	7								

Travel Request Expense Report

General Data

Start Date: * Time:

End Date: Time:

Destination

Country / Region:

Destination:

Additional Destinations:

Additional Information

Activity:

Reason:

Estimated Costs: * USD

Comment:

Advances:

Cost Assignment:

Create Travel Request (Enter Additional Destinations)



The Additional Destination row is highlighted in yellow.

Enter the START date, time and other info of the next destination in the highlighted row. Select the appropriate activity in the **Activity** field. In the example, Client Services was selected as the activity. You will now have the option of accepting the changes by clicking the **Accept** button.

You can add more destinations as needed by clicking on Accept and New Entry button.

If the information entered is correct, click the **Accept** button at the bottom of the page.

Create Travel Request

1 a 1 2 3
General Data Additional Destinations General Data Review and Send Completed

Employee ALICE WONDERLAND (00008515) Start Date 10/20/2009 End Date 10/22/2009

Previous Step Accept Exit to General Data Save Draft Cancel

Calendar of Trips

Additional Destinations

New Entry Delete

Event in Itinerary	Date	Time	Destination	Country	Reason
Start of Trip	10/20/2009	07:00 AM		USA	
Trip Destination	10/20/2009	07:00 AM	Charleston	US - South Carolina	To attend buyers
Additional Destination	10/21/2009	9:00 AM	Florence	USA	
End of Trip	10/22/2009	09:00 PM		USA	

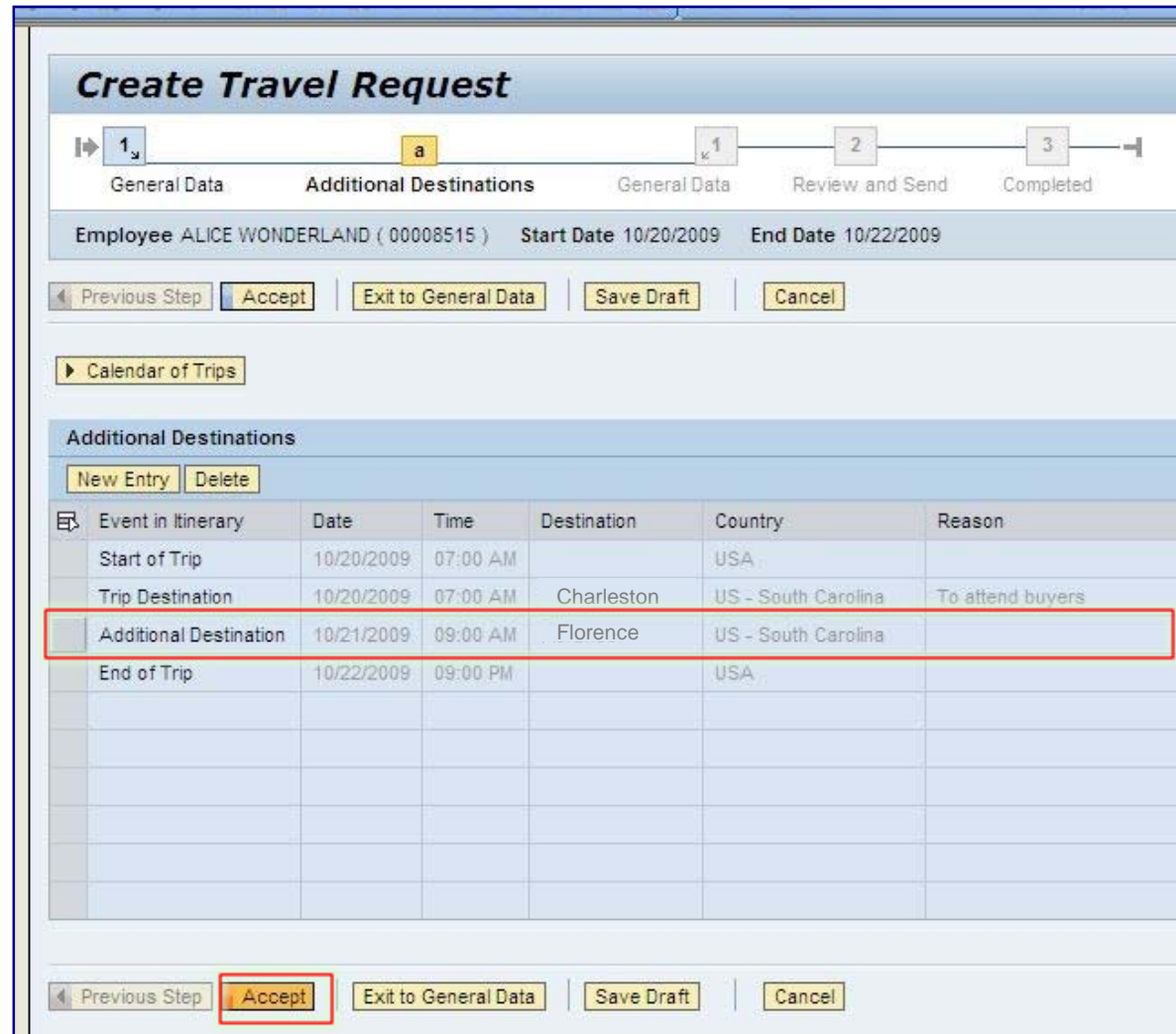
Activity: Client Services

Accept Accept and New Entry Delete

Previous Step Accept Exit to General Data Save Draft Cancel

Create Travel Request (Enter Additional Destinations)

Once all the additional destination(s) information is added, click the **Accept** button at the bottom of the page.



Create Travel Request

1 General Data a Additional Destinations 1 General Data 2 Review and Send 3 Completed

Employee ALICE WONDERLAND (00008515) Start Date 10/20/2009 End Date 10/22/2009

Previous Step **Accept** Exit to General Data Save Draft Cancel

Calendar of Trips

Additional Destinations

New Entry Delete

Event in Itinerary	Date	Time	Destination	Country	Reason
Start of Trip	10/20/2009	07:00 AM		USA	
Trip Destination	10/20/2009	07:00 AM	Charleston	US - South Carolina	To attend buyers
Additional Destination	10/21/2009	09:00 AM	Florence	US - South Carolina	
End of Trip	10/22/2009	09:00 PM		USA	

Previous Step **Accept** Exit to General Data Save Draft Cancel

Create Travel Request (Enter Advances)



If a cash advance for the trip is required and meets State Regulations click the **Enter Advances** button.

Note: The Comptroller General requires that the form "**Request for Official Travel Cash Advance**" be submitted along with the request. Therefore, this form must be completed and imaged as documentation for an advance.

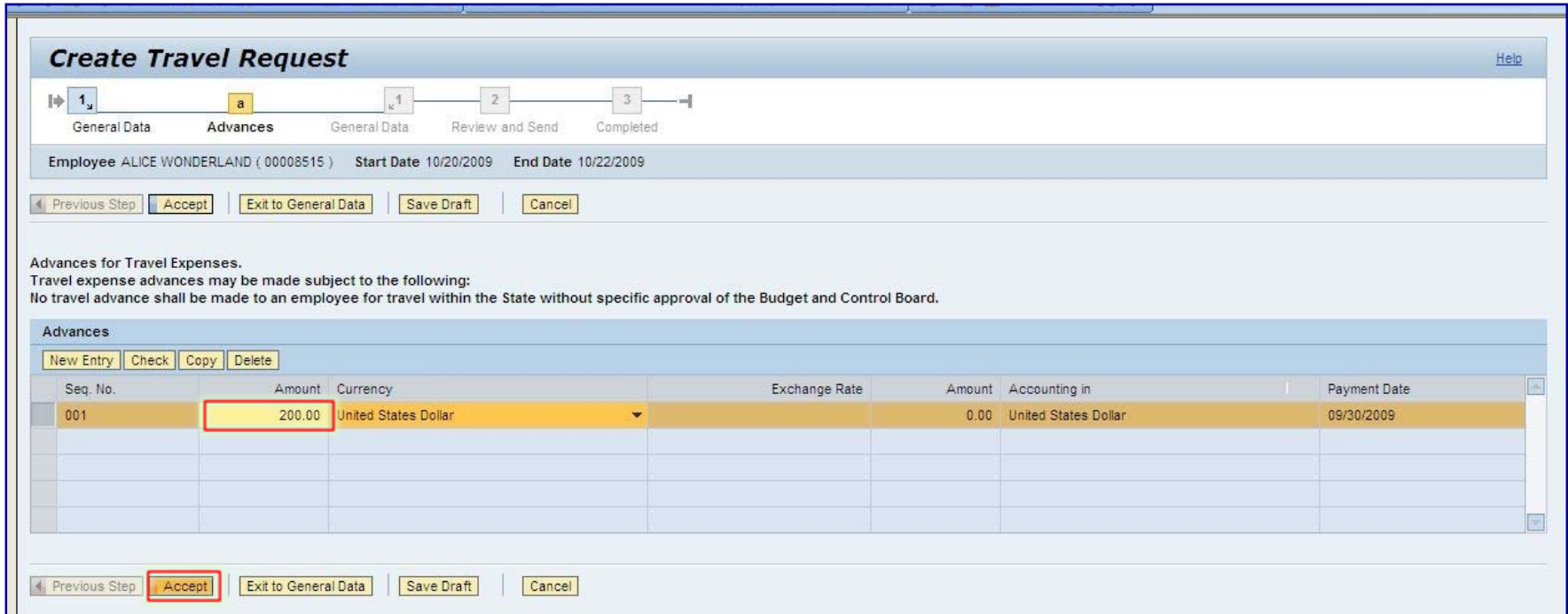
The screenshot displays the SOEIS Travel Request form. At the top, there are five calendar views for October 2009, November 2009, December 2009, January 2010, and February 2010. A legend indicates that red squares represent 'Travel Request' and yellow squares represent 'Expense Report'. In the October 2009 calendar, dates 13, 14, 15, and 16 are highlighted in red. Below the calendars, the form is divided into several sections:

- General Data:** Start Date: 10/20/2009, Time: 07:00 AM; End Date: 10/22/2009, Time: 09:00 PM.
- Destination:** Country / Region: US - South Carolina; Destination: Charleston.
- Additional Destinations:** 10/21/2009 Florence (with an 'Enter Additional Destinations' button).
- Additional Information:** Activity: Conference / Meeting; Reason: To attend buyers conference; Estimated Costs: 300.00 USD; Comment: Enter comments here.
- Advances:** 200.00 United States Dollar (with an 'Enter Advances' button).
- Cost Assignment:** 100.00 % Cost Center F030000010 (B & C BOARD), Funds Center F030000010 (BUD) (with a 'Change Cost Assignment' button).

At the bottom of the form, there are navigation buttons: Previous Step, Review, Save Draft, and Cancel.

Create Travel Request (Enter Advances)

Enter the amount of the requested cash advance in the **Amount** field. Note: This amount must match the amount that was submitted on the Request for Official Travel Cash Advance form. If the information entered is correct, click the **Accept** button at the bottom of the page.



Create Travel Request [Help](#)

1. General Data a. **Advances** 1. General Data 2. Review and Send 3. Completed

Employee ALICE WONDERLAND (00008515) Start Date 10/20/2009 End Date 10/22/2009

Previous Step **Accept** Exit to General Data Save Draft Cancel

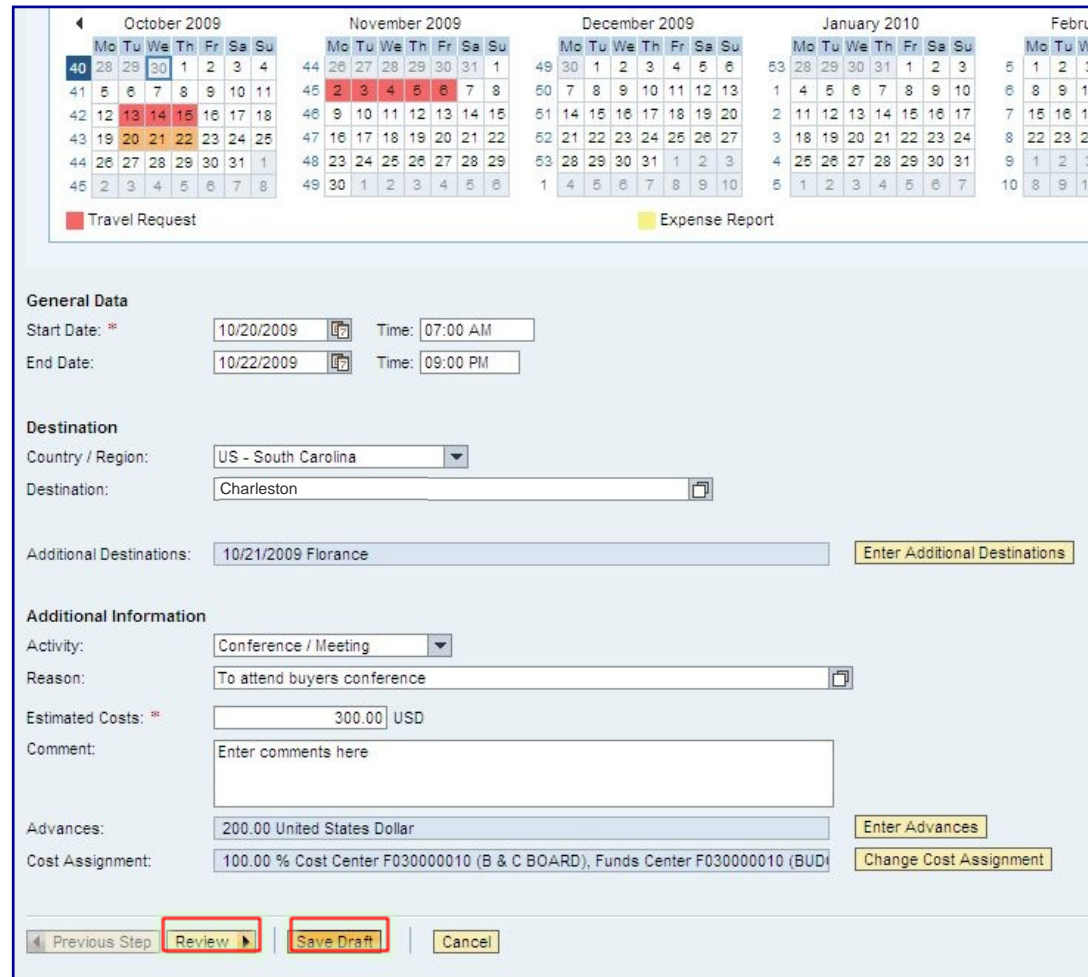
Advances for Travel Expenses.
Travel expense advances may be made subject to the following:
No travel advance shall be made to an employee for travel within the State without specific approval of the Budget and Control Board.

Seq. No.	Amount	Currency	Exchange Rate	Amount	Accounting in	Payment Date
001	200.00	United States Dollar		0.00	United States Dollar	09/30/2009

Previous Step **Accept** Exit to General Data Save Draft Cancel

My Travel and Expenses (Create Travel Request)

At this point in the travel request process, you must use the **Save Draft** button to save your work to this point. If you are prepared to continue, click the **Review** button located at the bottom of the page.



The screenshot displays the SOEIS Travel Request form. At the top, there are four calendar views for October 2009, November 2009, December 2009, and January 2010. A legend indicates that red squares represent 'Travel Request' and yellow squares represent 'Expense Report'. The form is divided into several sections:

- General Data:** Start Date: 10/20/2009, Time: 07:00 AM; End Date: 10/22/2009, Time: 09:00 PM.
- Destination:** Country / Region: US - South Carolina; Destination: Charleston.
- Additional Destinations:** 10/21/2009 Florence (with an 'Enter Additional Destinations' button).
- Additional Information:** Activity: Conference / Meeting; Reason: To attend buyers conference; Estimated Costs: 300.00 USD; Comment: Enter comments here.
- Advances:** 200.00 United States Dollar (with an 'Enter Advances' button).
- Cost Assignment:** 100.00 % Cost Center F030000010 (B & C BOARD), Funds Center F030000010 (BUD) (with a 'Change Cost Assignment' button).

At the bottom of the form, there are four buttons: 'Previous Step', 'Review', 'Save Draft', and 'Cancel'. The 'Review' and 'Save Draft' buttons are highlighted with red boxes in the original image.

My Travel and Expenses (Create Travel Request)

With all required information entered, you are now on step 2 of the Create Travel Request process. If you are not ready to submit the request for approval, or if you have documentation that needs to be imaged along with the request, select the **Save** button under the Final Action. If the request is complete, select the button **Save and Send for Approval** under the Final Action. If you have entered all required information, you can display request form by clicking the **Display Request Form** link.



Change Travel Request (211)

1 2 3
General Data Review and Send Completed

Employee ALICE WONDERLAND (00008515) Start Date 10/20/2009 End Date 10/22/2009

Previous Step Save Cancel

Final Action

Save 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

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 Travel Expenses	300.00 USD
Total Advances	- 200.00 USD
Amount Paid Out	200.00- USD
Estimated Costs	300.00 USD

Cost Assignment

300.00 USD Company Code SC01 (State of South Carolina), Business Area F030 (BUDGET AND CONTROL BOARD), Cost Center F030000010 (B & C BOARD), Funds Center F030000010 (BUDGET & CONTROL BD), Fun

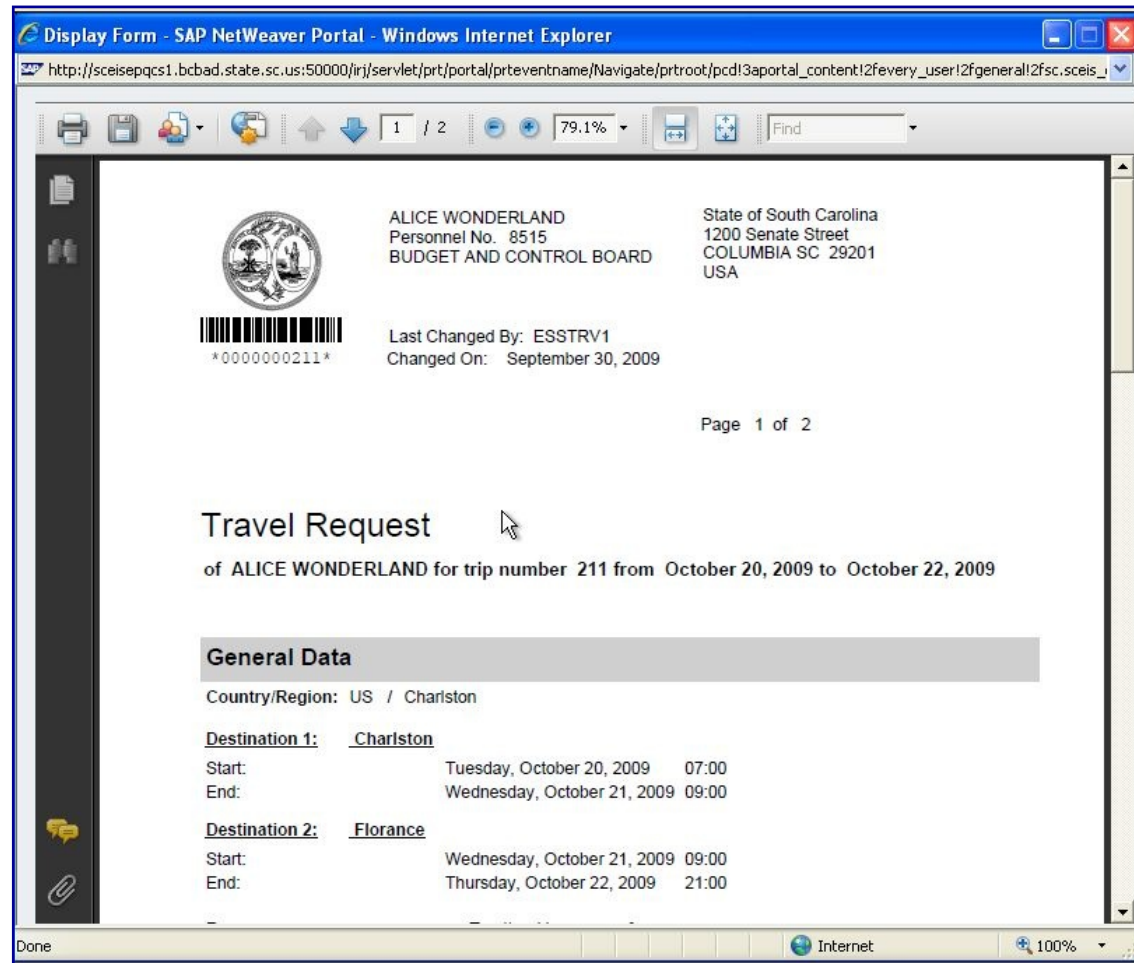
Display Request Form

Previous Step Save and Send for Approval Cancel

My Travel and Expenses (Create Travel Request)

After clicking the **Display Request Form** link, a PDF version of the Travel request is generated in a new window. After viewing, printing or saving the file, you can simply click the X in the upper right-hand corner to close the window.

Use this form as a cover page for sending your documentation for imaging. This form will be used when scanning documents using the copiers. Be sure it contains a trip number under the bar code. You will be notified by email once your documents are imaged.



The screenshot shows a web browser window titled "Display Form - SAP NetWeaver Portal - Windows Internet Explorer". The address bar shows a URL starting with "http://sceisepqcs1.bcbad.state.sc.us:50000/irj/servlet/prt/portal/prteventname/Navigate/prtroot/pcd/3aportal_content/2fevery_user/2fgeneral/2fsc_sceis_". The browser toolbar shows a search bar with "Find" and a zoom level of 79.1%. The main content area displays a form for a travel request. At the top left is the state seal of South Carolina. To its right, the text reads: "ALICE WONDERLAND", "Personnel No. 8515", "BUDGET AND CONTROL BOARD", and "State of South Carolina", "1200 Senate Street", "COLUMBIA SC 29201", "USA". Below the seal is a barcode with the number "*0000000211*" underneath it. To the right of the barcode, it says "Last Changed By: ESSTRV1" and "Changed On: September 30, 2009". The page is labeled "Page 1 of 2". The main title of the form is "Travel Request" with a mouse cursor over it. Below the title, it says "of ALICE WONDERLAND for trip number 211 from October 20, 2009 to October 22, 2009". A section titled "General Data" is highlighted in grey. Under "Country/Region:", it says "US / Charleston". There are two destinations listed: "Destination 1: Charleston" and "Destination 2: Florence". For each destination, the start and end times are provided. For Charleston: Start: Tuesday, October 20, 2009 07:00; End: Wednesday, October 21, 2009 09:00. For Florence: Start: Wednesday, October 21, 2009 09:00; End: Thursday, October 22, 2009 21:00. The browser status bar at the bottom shows "Done" and "Internet" with a 100% zoom level.

My Travel and Expenses (Create Travel Request)

In the example below, we are treating the request as if it is ready to **Save and Send for Approval**.

Change Travel Request (211)

1 2 3
General Data Review and Send Completed

Employee ALICE WONDERLAND (00008515) Start Date 10/20/2009 End Date 10/22/2009

Previous Step Save Cancel

Final Action

Save 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 Travel Expenses	300.00 USD
Total Advances	- 200.00 USD
Amount Paid Out	200.00- USD
Estimated Costs	300.00 USD

Cost Assignment

300.00 USD Company Code SC01 (State of South Carolina), Business Area F030 (BUDGET AND CONTROL BOARD), Cost Center F030000010 (B & C BOARD), Funds Center F030000010 (BUDGET & CONTROL BD), Fun

Display Request Form

Previous Step Save and Send for Approval Cancel

My Travel and Expenses (Create Travel Request)

Step 3, completed, indicates that the request has been submitted to your manager for approval. Click the **Exit** button to close the travel request.

Change Travel Request (211)

1 2 3
General Data Review and Send Completed

Employee ALICE WONDERLAND (00008515) Start Date 10/20/2009 End Date 10/22/2009

Previous Step Save and Send for Approval | Exit

Travel request 0000000211 was saved
 100.00 % will be assigned acc. to trip costs assignment guidelines

Display Request Form

Previous Step Save and Send for Approval | Exit

Create Travel Request (Change Cost Assignment)



The **Cost Assignment**, for a Travel Request or Expense Report, is a combination of various cost objects including the designated Cost Center, WBS Element (if applicable), Fund Center, Fund, Functional Area and Grant (if applicable).

By default, travel related expenses will be charged to the same Cost Assignment used for the Employee's Payroll. If necessary, employees are authorized to change the Cost Assignment using different cost objects (i.e. Cost Center, Fund, or Grant) for **YOUR AGENCY ONLY**. Only designated individuals in an Agency will have authorization to process expenses of employees of other Agencies, when the employee travels on behalf of their agency.

October 2009							November 2009							December 2009							January 2010							February 2010											
Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su					
40	28	29	30	1	2	3	4	44	26	27	28	29	30	31	1	49	30	1	2	3	4	5	6	53	28	29	30	31	1	2	3	6	1	2	3	4	5	6	7
41	5	6	7	8	9	10	11	45	2	3	4	5	6	7	8	50	7	8	9	10	11	12	13	1	4	5	6	7	8	9	10	7	8	9	10	11	12	13	14
42	12	13	14	15	16	17	18	46	9	10	11	12	13	14	15	51	14	15	16	17	18	19	20	2	11	12	13	14	15	16	17	8	15	16	17	18	19	20	21
43	19	20	21	22	23	24	25	47	16	17	18	19	20	21	22	52	21	22	23	24	25	26	27	3	18	19	20	21	22	23	24	9	22	23	24	25	26	27	28
44	26	27	28	29	30	31	1	48	23	24	25	26	27	28	29	53	28	29	30	31	1	2	3	4	25	26	27	28	29	30	31	10	1	2	3	4	5	6	7
45	2	3	4	5	6	7	8	49	30	1	2	3	4	5	6	1	4	5	6	7	8	9	10	5	1	2	3	4	5	6	7								

Travel Request Expense Report

General Data

Start Date: * Time:

End Date: Time:

Destination

Country / Region:

Destination:

Additional Destinations:

Additional Information

Activity:

Reason:

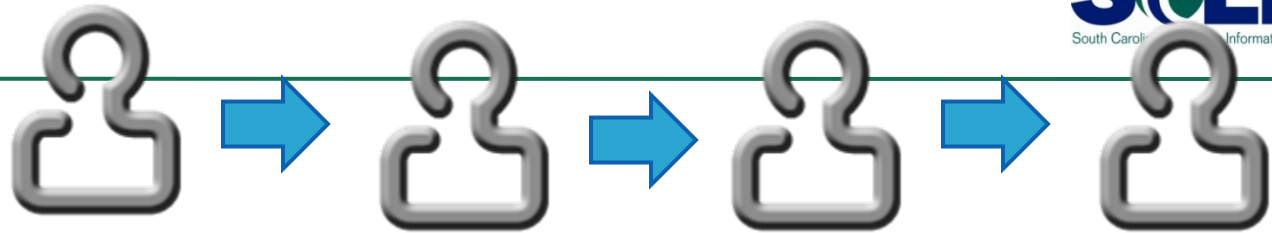
Estimated Costs: * USD

Comment:

Advances:

Cost Assignment:

Approval Process



Level	1 st Level Approver	1 st Level Approver after time expires for Supervisor	2 nd Level Approver	3 rd Level Approver
Travel Document	All	All	All	Advance, Expense
Role	Supervisor	Supervisor's Supervisor	Agency AP	State CG
Review Time	5 Calendar Days	5 Calendar Days	7 Calendar Days	10 Calendar Days
Approval System	Portal	Portal	SAP GUI	SAP GUI

Lesson 2 Summary

- 🌀 You should now be able to:
 - Create a Travel Request



South Carolina Enterprise Information System

LESSON 4: Changing, Copying or Deleting a Travel Request and/or Expense Report

Lesson 4 Learning Objectives

- ④ Upon completion of this lesson, you should be able to:
 - Change a Travel Request
 - Change a Travel Expense Report
 - Copy a Travel Request
 - Copy a Travel Expense Report
 - Delete a Travel Request
 - Delete a Travel Expense Report

My Travel and Expenses (Change a Travel Request or Expense Report)



To change, copy or delete a Travel Request or an Expense Report, from the **My Travel and Expenses** overview page, select the **My Trips and Expenses** link.

Welcome essuser1, **MySCEmployee** powered by SOEIS

Welcome | Employee Self-Service

My Overview | My Employee Search | My Working Time | My Pay | My Personal Info | My Benefits | **My Travel and Expenses** | My Career

My Travel and Expenses

My Travel and Expenses

Travel Requests and Expense Reports

[My Trips and Expenses](#)
Display, change, copy, or cancel one of your existing travel requests or expense reports.

[Create Travel Request](#)
Create a Travel Request if a prior approval for Travel is required.

[Create Expense Report](#)
Create an expense report for a trip. You can also create expense report for trips with existing travel requests.

[My Employees](#)
Create expense reports for others that you are authorized to maintain.

Travel Regulations

[Comptroller General Travel Regulations](#)
REGULATIONS FOR REIMBURSEMENT FOR TRAVEL AND SUBSISTANCE EXPENSES

[US General Services Administration](#)
GSA-Domestic Per Diem Rates

[Budget and Control Board Travel Regulations](#)
South Carolina Legislature - Code of Regulations

Personal Information

[Unlock Personnel Number](#)

[My Alerts](#)
Show trips and expense reports that have alerts.

My Travel and Expenses (Change a Travel Request)



From the **My Trips and Expenses** page, click the **All My Travel Requests** tab to view a list of Travel Requests. Select the Travel Request you want to **Change**, by clicking the square in the far left-hand column that corresponds to the appropriate Travel Request.

My Trips and Expenses (ALICE WONDERLAND, 00008515)

All My Trips (27) | **All My Travel Requests (19)** | All My Travel Plans (0) | All My Expense Reports (8) | Pending Exp. Reports (7) | Credit Card Imports (0)

Change Query

View [Standard View] | Display/Print | **Change** | Copy | Delete | Create New Travel Request | Exit | Filter Settings

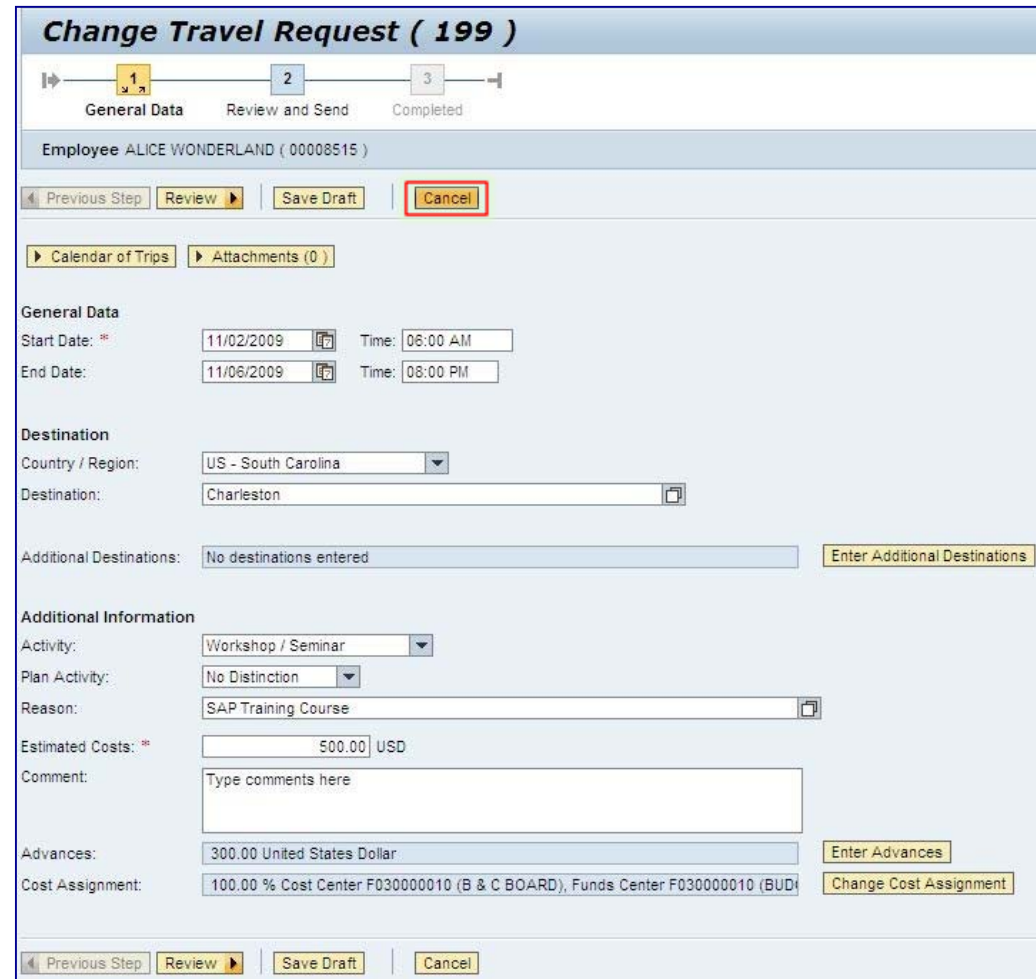
☐	Trip Number	Start Date	End Date	Destination	Reason	Processing Status	Approval Status	Attachments	Expense Report
☐	211	10/20/2009	10/22/2009	Charleston	To attend buyers conference	Released for approval	Request Recorded	Add	Create
☐	199	11/02/2009	11/06/2009	Charleston	SAP Training Course	In process	Request Open	Add	Create
☐	198	10/13/2009	10/15/2009	Charleston	Conference at Charleston	Released for approval	Request Recorded	Add	Create
☐	184	09/02/2009	09/02/2009		sec	In process	Request Open	Add	Create
☐	175	09/01/2009	09/01/2009		security	In process	Request Open	Add	Create
☐	173	05/13/2009	05/13/2009	c	3 day notification deadline notify for state cg approver	Released for approval	Request Recorded	Add	Create
☐	172	05/12/2009	05/12/2009	c	3 day deadline notification for agency ap approver	Released for approval	Request Recorded	Add	Create
☐	171	05/11/2009	05/11/2009	c	3 day deadline notify for supervisor	Released for approval	Request Recorded	Add	Create
☐	83	08/29/2009	08/29/2009	test future rejection	changed request #1 #2	Released for approval	Request Recorded	Add	Create
☐	82	06/29/2009	06/29/2009	demo for work flow		Approved	Request Approved	Add	Create

My Travel and Expenses (Change a Travel Request)

After clicking the Change button on the previous screen, you will see the details of the Travel Request, which allow users to process any changes the same way as you process a new request.

If you CHANGE a Travel Request currently in the approval process, it will TERMINATE the approval process. A change constitutes clicking the **Save Draft** button from any screen, or from clicking the **Save** or **Save and Submit** buttons located on the final screen.

If you decide not to make or save any changes, use the **Cancel** button to return to the main screen.



Change Travel Request (199)

1 2 3
General Data Review and Send Completed

Employee ALICE WONDERLAND (00008515)

Previous Step Review Save Draft **Cancel**

Calendar of Trips Attachments (0)

General Data
Start Date: * 11/02/2009 Time: 06:00 AM
End Date: 11/06/2009 Time: 08:00 PM

Destination
Country / Region: US - South Carolina
Destination: Charleston
Additional Destinations: No destinations entered Enter Additional Destinations

Additional Information
Activity: Workshop / Seminar
Plan Activity: No Distinction
Reason: SAP Training Course
Estimated Costs: * 500.00 USD
Comment: Type comments here

Advances: 300.00 United States Dollar Enter Advances
Cost Assignment: 100.00 % Cost Center F030000010 (B & C BOARD), Funds Center F030000010 (BUD) Change Cost Assignment

Previous Step Review Save Draft Cancel

My Travel and Expenses (Copy a Travel Request)



To Copy a Travel Request, from the **My Trips and Expenses** page, click the **All My Travel Requests** tab to view a list of Travel Requests. Select the Travel Request you want to **Copy**, by clicking the square in the far left-hand column that corresponds to the appropriate Travel Request. Then click the Copy button.

My Trips and Expenses (ALICE WONDERLAND, 00008515)

[All My Trips \(27\)](#) |
 [All My Travel Requests \(19\)](#) |
 [All My Travel Plans \(0\)](#) |
 [All My Expense Reports \(8\)](#) |
 [Pending Exp. Reports \(7\)](#) |
 [Credit Card Imports \(0\)](#)

[Change Query](#)

View [Standard View] |
 [Display/Print](#) |
 [Change](#) |
 [Copy](#) |
 [Delete](#) |
 [Create New Travel Request](#) |
 [Exit](#)
[Filter](#) [Settings](#)

Trip Number	Start Date	End Date	Destination	Reason	Processing Status	Approval Status	Attachments	Expense Report
211	10/20/2009	10/22/2009	Charleston	To attend buyers conference	Released for approval	Request Recorded	Add	Create
199	11/02/2009	11/06/2009	Charleston	SAP Training Course	In process	Request Open	Add	Create
198	10/13/2009	10/15/2009	Charleston	Conference at Charleston	Released for approval	Request Recorded	Add	Create
184	09/02/2009	09/02/2009		sec	In process	Request Open	Add	Create
175	09/01/2009	09/01/2009		security	In process	Request Open	Add	Create
173	05/13/2009	05/13/2009	c	3 day notification deadline notify for state cg approver	Released for approval	Request Recorded	Add	Create
172	05/12/2009	05/12/2009	c	3 day deadline notification for agency ap approver	Released for approval	Request Recorded	Add	Create
171	05/11/2009	05/11/2009	c	3 day deadline notify for supervisor	Released for approval	Request Recorded	Add	Create
83	08/29/2009	08/29/2009	test future rejection	changed request #1 #2	Released for approval	Request Recorded	Add	Create
82	06/29/2009	06/29/2009	demo for work flow		Approved	Request Approved	Add	Create

Last Refresh 10/02/2009 13:25:04 EST [Refresh](#)

My Travel and Expenses (Copy a Travel Request)

After clicking the Copy button on the previous screen, you will see high-level information regarding the request you want to copy. Select a **New Start Date** and click the **Start** button to process the new request.

Copy Travel Request

Employee ALICE WONDERLAND (00008515)

|

Copy From

Personnel No.: *

Trip Number: *


Information

Start Date: End Date:

Country:

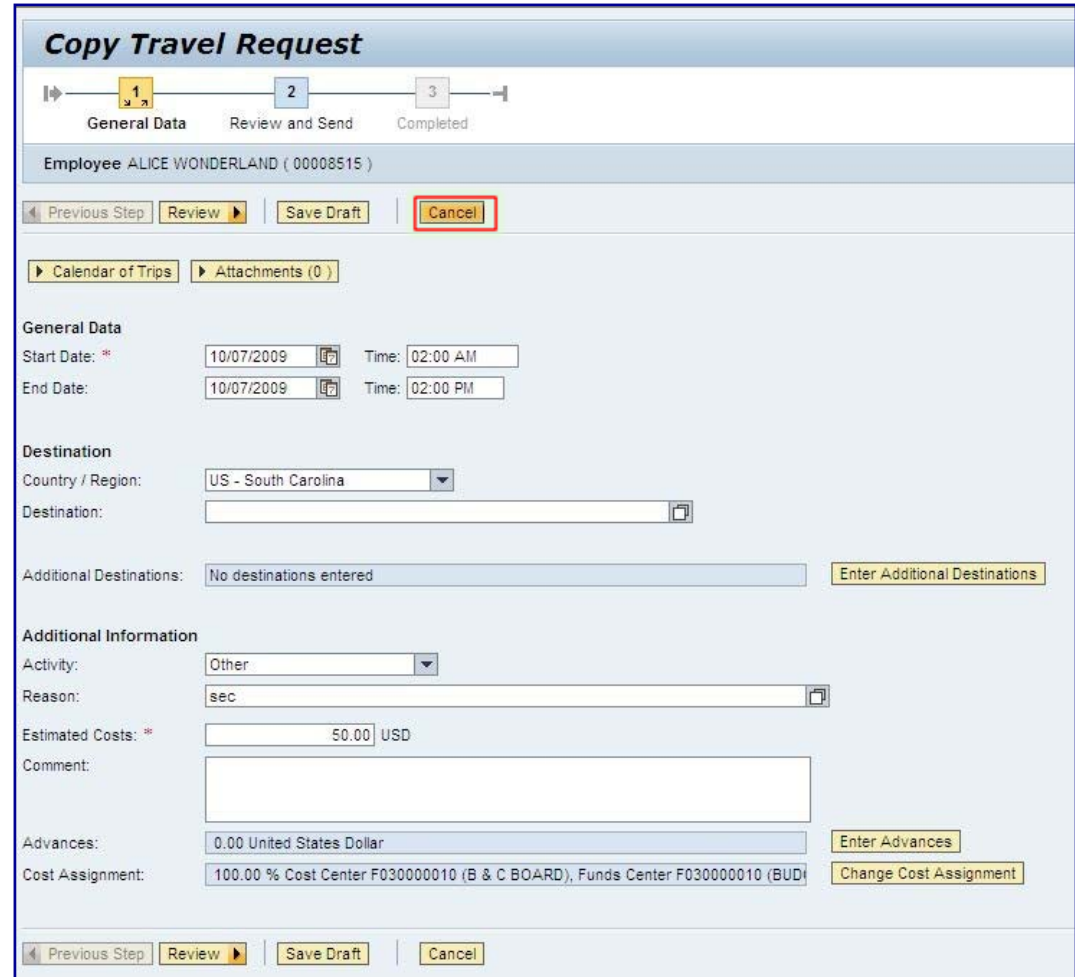
Reason:

Copy To

New Start Date: * 

My Travel and Expenses (Copy a Travel Request)

After clicking the Start button on the previous screen, you be able to follow the steps outlined earlier for creating a Travel Request, except most of the information will now be copied over from the selected Travel Request. To abort the request, click the **Cancel** button on the top of the page.



Copy Travel Request

1 2 3
General Data Review and Send Completed

Employee ALICE WONDERLAND (00008515)

Previous Step Review Save Draft **Cancel**

Calendar of Trips Attachments (0)

General Data
Start Date: * 10/07/2009 Time: 02:00 AM
End Date: 10/07/2009 Time: 02:00 PM

Destination
Country / Region: US - South Carolina
Destination:
Additional Destinations: No destinations entered Enter Additional Destinations

Additional Information
Activity: Other
Reason: sec
Estimated Costs: * 50.00 USD
Comment:
Advances: 0.00 United States Dollar Enter Advances
Cost Assignment: 100.00 % Cost Center F030000010 (B & C BOARD), Funds Center F030000010 (BUD Change Cost Assignment

Previous Step Review Save Draft Cancel

My Travel and Expenses (Delete a Travel Request)



To Delete a Travel Request, from the **My Trips and Expenses** page, click the **All My Travel Requests** tab to view a list of Travel Requests. Select the Travel Request you want to **Delete**, by clicking the square in the far left-hand column that corresponds to the appropriate Travel Request. Then click the Delete button. Note: You will not be allowed to delete an approved Travel Request.

My Trips and Expenses (ALICE WONDERLAND, 00008515)

[All My Trips \(27\)](#) |
 [All My Travel Requests \(19\)](#) |
 [All My Travel Plans \(0\)](#) |
 [All My Expense Reports \(8\)](#) |
 [Pending Exp. Reports \(7\)](#) |
 [Credit Card Imports \(0\)](#)

[Change Query](#)

View [Standard View] |
 [Display/Print](#) |
 [Change](#) |
 [Copy](#) |
 [Delete](#) |
 [Create New Travel Request](#) |
 [Exit](#)
[Filter Settings](#)

Trip Number	Start Date	End Date	Destination	Reason	Processing Status	Approval Status	Attachments	Expense Report
211	10/20/2009	10/22/2009	Charleston	To attend buyers conference	Released for approval	Request Recorded	Add	Create
199	11/02/2009	11/06/2009	Charleston	SAP Training Course	In process	Request Open	Add	Create
198	10/13/2009	10/15/2009	Charleston	Conference at Charleston	Released for approval	Request Recorded	Add	Create
184	09/02/2009	09/02/2009		sec	In process	Request Open	Add	Create
175	09/01/2009	09/01/2009		security	In process	Request Open	Add	Create
173	05/13/2009	05/13/2009	c	3 day notification deadline notify for state cg approver	Released for approval	Request Recorded	Add	Create
172	05/12/2009	05/12/2009	c	3 day deadline notification for agency ap approver	Released for approval	Request Recorded	Add	Create
171	05/11/2009	05/11/2009	c	3 day deadline notify for supervisor	Released for approval	Request Recorded	Add	Create
83	08/29/2009	08/29/2009	test future rejection	changed request #1 #2	Released for approval	Request Recorded	Add	Create
82	06/29/2009	06/29/2009	demo for work flow		Approved	Request Approved	Add	Create


Last Refresh 10/02/2009 13:25:04 EST [Refresh](#)


My Travel and Expenses (Delete a Travel Request)

After clicking the Delete button on the previous screen, you will see high-level information regarding the request you want to delete. If you are ready to delete the request, click either **Delete** button, found on the top and bottom of the page. To cancel the request, click the cancel button.

Delete Travel Request (184)

Employee ALICE WONDERLAND (00008515) Today's Date 10/02/2009

 Annual budget exceeded by 2,407.13 USD (FM PB Availability Control) for document item 00010 - [Display Help](#)

 Trip has already taken place. Please delete expense type ESTC from 20090902

You are about to delete a travel request or an expense report. If you continue, the data will be permanently deleted.

General Data

Trip Number: 0000000184

Start: 09/02/2009 Time: 02:00:00 AM
End: 09/02/2009 Time: 02:00:00 PM

Location:
Country: US - South Carolina

Reason for Trip: sec

Summary

Total Travel Expenses 50.00 USD

Estimated Costs 50.00 USD

Cost Assignment

50.00 USD Company Code SC01 (State of South Carolina), Business Area F030 (BUDGET AND CONTROL BOARD), Cost Center F03

My Travel and Expenses

(Delete a Travel Request)

After clicking the Delete button on the previous screen, you see a confirmation message explaining that the request has been deleted. Click the **Exit** button to return the My Trips and Expenses page.



Delete Travel Request (184)

Employee ALICE WONDERLAND (00008515) Today's Date 10/02/2009

◀ Previous Step Delete | **Exit**

Request and expense report of trip number 0000000184 have been deleted

◀ Previous Step Delete | **Exit**

My Travel and Expenses (Change an Expense Report)



From the **My Trips and Expenses** page, click the **All My Expense Reports** tab to view a list of Expense Reports. Select the Expense Report you want to **Change**, by clicking the square in the far left-hand column that corresponds to the appropriate Travel Request.

Note: Approved Expense Reports can not be changed.

My Trips and Expenses (ALICE WONDERLAND, 00008515)

[All My Trips \(26\)](#) |
 [All My Travel Requests \(18\)](#) |
 [All My Travel Plans \(0\)](#) |
 [All My Expense Reports \(8\)](#) |
 [Pending Exp. Reports \(7\)](#) |
 [Credit Card Imports \(0\)](#)

[Change Query](#)

View [Standard View] |
 [Display/Print](#) |
 [Change](#) |
 [Copy](#) |
 [Delete](#) |
 [Create New Expense Report](#) |
 [Exit](#)
[Filter](#) [Settings](#)

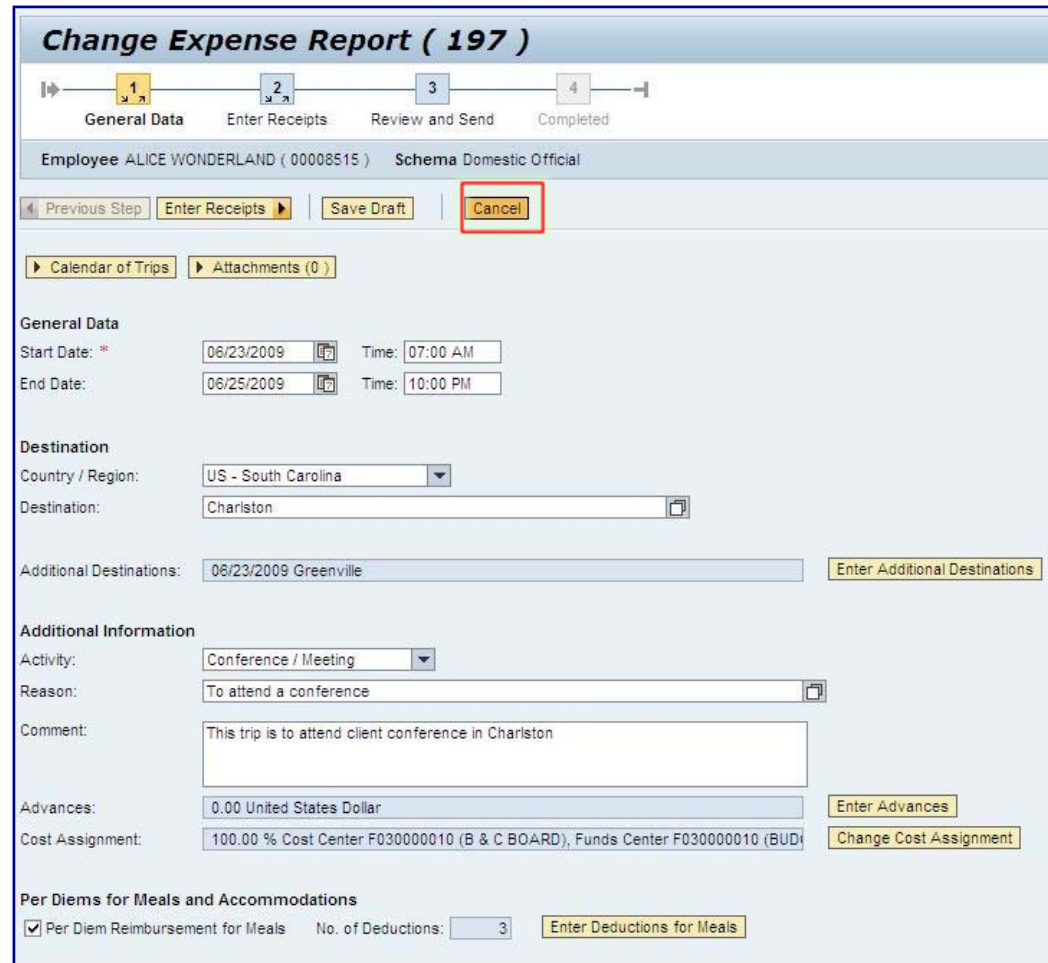
☐	Trip Number	Start Date	End Date	Destination	Reason	Reimbursmt	Currency	Approval Status	Attachments
	20030	07/21/2009	07/21/2009			80.00	USD	Trip Completed	Add
	20010	06/02/2009	06/02/2009	One day Outside SC	One day Outside SC	207.00	USD	Trip Approved	Add
	212	06/17/2009	06/18/2009	Charleston	State Staff Meeting	163.75	USD	Trip Completed	Add
	197	06/23/2009	06/25/2009	Charleston	To attend a conference	219.25	USD	Trip Completed	Add
	193	06/09/2009	06/09/2009	n		46.50	USD	Trip Completed	Add
	185	09/03/2009	09/03/2009	Security test for A/P		54.65	USD	Trip Completed	Add
	156	06/03/2009	06/03/2009			14.65	USD	Trip Completed	Add
	84	07/06/2009	07/07/2009	Charleston	testing of posting demo	339.25	USD	Trip Approved	Add

My Travel and Expenses (Change an Expense Report)

After clicking the Change button on the previous screen, you will see the details of the Expense Report, which allow you to process any changes the same way as you would when creating a new report.

If you CHANGE an Expense Report currently in the approval process, it will TERMINATE the approval process. A change constitutes clicking the **Save Draft** button from any screen, or from clicking the **Save** or **Save and Submit** buttons located on the final screen.

If you decide not to make or save any changes, use the **Cancel** button to return to the main screen.



Change Expense Report (197)

1 2 3 4
General Data Enter Receipts Review and Send Completed

Employee ALICE WONDERLAND (00008515) Schema Domestic Official

Previous Step Enter Receipts Save Draft **Cancel**

Calendar of Trips Attachments (0)

General Data
Start Date: * 06/23/2009 Time: 07:00 AM
End Date: 06/25/2009 Time: 10:00 PM

Destination
Country / Region: US - South Carolina
Destination: Charleston

Additional Destinations: 06/23/2009 Greenville Enter Additional Destinations

Additional Information
Activity: Conference / Meeting
Reason: To attend a conference
Comment: This trip is to attend client conference in Charleston

Advances: 0.00 United States Dollar Enter Advances
Cost Assignment: 100.00 % Cost Center F030000010 (B & C BOARD), Funds Center F030000010 (BUD) Change Cost Assignment

Per Diems for Meals and Accommodations
 Per Diem Reimbursement for Meals No. of Deductions: 3 Enter Deductions for Meals

My Travel and Expenses (Copy an Expense Report)

To Copy an Expense Report, from the **My Trips and Expenses** page, click the **All My Expense Reports** tab to view a list of Expense Reports. Select the Travel Request you want to **Copy**, by clicking the square in the far left-hand column that corresponds to the appropriate Travel Request. Then click the Copy button.

My Trips and Expenses (ALICE WONDERLAND, 00008515)

All My Trips (26) | All My Travel Requests (18) | All My Travel Plans (0) | **All My Expense Reports (8)** | Pending Exp. Reports (7) | Credit Card Imports (0)

View [Standard View] | Display/Print | Change | **Copy** | Delete | Create New Expense Report | Exit | Filter Settings | Change Query

Trip Number	Start Date	End Date	Destination	Reason	Reimbursmt	Currency	Approval Status	Attachments
20030	07/21/2009	07/21/2009			80.00	USD	Trip Completed	Add
20010	06/02/2009	06/02/2009	One day Outside SC	One day Outside SC	207.00	USD	Trip Approved	Add
212	06/17/2009	06/18/2009	Charleston	State Staff Meeting	163.75	USD	Trip Completed	Add
197	06/23/2009	06/25/2009	Charleston	To attend a conference	219.25	USD	Trip Completed	Add
193	06/09/2009	06/09/2009			46.50	USD	Trip Completed	Add
185	09/03/2009	09/03/2009	Security test for A/P		54.65	USD	Trip Completed	Add
156	06/03/2009	06/03/2009			14.65	USD	Trip Completed	Add
84	07/06/2009	07/07/2009	Charleston	testing of posting demo	339.25	USD	Trip Approved	Add

My Travel and Expenses (Copy an Expense Report)

After clicking the Copy button on the previous screen, you will see high-level information regarding the report you want to copy.

Select a **New Start Date** and click the **Start** button to process the new report.

Copy Expense Report

Employee: ALICE WONDERLAND (00008515)

|

Copy From

Personnel No.: *

Trip Number: *

Information

Start Date: End Date:

Location:

Country:

Reason:

Copy To

New Start Date: *

My Travel and Expenses (Copy an Expense Report)

After clicking the Start button on the previous screen, you be able to follow the steps outlined earlier for creating an Expense Report, except most of the information will now be copied over from the selected Expense Report. To abort the request, click the **Cancel** button on the top of the page.

Copy Expense Report

1 2 3 4
General Data Enter Receipts Review and Send Completed

Employee: ALICE WONDERLAND (00008515) Schema: Domestic Official

Previous Step Enter Receipts Save Draft **Cancel**

Calendar of Trips Attachments (0)

General Data
Start Date: * 10/05/2009 Time: 07:00 AM
End Date: 10/07/2009 Time: 10:00 PM

Destination
Country / Region: US - South Carolina
Destination: Charleston

Additional Destinations: 10/05/2009 Greenville Enter Additional Destinations

Additional Information
Activity: Conference / Meeting
Reason: To attend a conference
Comment: This trip is to attend client conference in Charleston

Advances: 0.00 United States Dollar Enter Advances
Cost Assignment: 100.00 % Cost Center F030000010 (B & C BOARD), Funds Center F030000010 (BUD) Change Cost Assignment

Per Diems for Meals and Accommodations
 Per Diem Reimbursement for Meals No. of Deductions: 3 Enter Deductions for Meals

My Travel and Expenses (Delete an Expense Report)

To Delete an Expense Report, from the **My Trips and Expenses** page, click the **All My Expense Reports** tab to view a list of Expense Reports. Select the Expense Report you want to Delete, by clicking the square in the far left-hand column that corresponds to the appropriate report. Then click the **Delete** button.

My Trips and Expenses (ALICE WONDERLAND, 00008515)

All My Trips (27) All My Travel Requests (18) All My Travel Plans (0) All My Expense Reports (9) Pending Exp. Reports (8) Credit Card Imports (0)

View [Standard View] Display/Print Change Copy **Delete** Create New Expense Report Exit Change Query Filter Settings

Trip Number	Start Date	End Date	Destination	Reason	Reimbursmt	Currency	Approval Status	Attachments
20030	07/21/2009	07/21/2009			80.00	USD	Trip Completed	Add
20010	06/02/2009	06/02/2009	One day Outside SC	One day Outside SC	207.00	USD	Trip Approved	Add
215	10/05/2009	10/07/2009	Charlston	To attend a conference	219.25	USD	Trip Completed	Add
212	06/17/2009	06/18/2009	Charlston	State Staff Meeting	163.75	USD	Trip Completed	Add
197	06/23/2009	06/25/2009	Charlston	To attend a conference	219.25	USD	Trip Completed	Add
193	06/09/2009	06/09/2009			46.50	USD	Trip Completed	Add
185	09/03/2009	09/03/2009	Security test for A/P		54.65	USD	Trip Completed	Add
156	06/03/2009	06/03/2009			14.65	USD	Trip Completed	Add
84	07/06/2009	07/07/2009	Charleston	testing of posting demo	339.25	USD	Trip Approved	Add

My Travel and Expenses (Delete an Expense Report)

After clicking the Delete button on the previous screen, you will see high-level information regarding the report you want to delete. If you are ready to delete the report, click the **Delete** button, found on the top of the page. To cancel the request, click the **Cancel** button. You will not be able to delete an approved Expense Report.

Delete Expense Report (215)

Employee ALICE WONDERLAND (00008515) Today's Date 10/02/2009

You are about to delete a travel request or an expense report. If you continue, the data will be permanently deleted.

General Data

Trip Number: 0000000215

Start: 10/05/2009 Time: 07:00:00 AM
End: 10/07/2009 Time: 10:00:00 PM

Location: Charleston
Country: US - South Carolina

Reason for Trip: To attend a conference

Summary

Total Meals per Diem	55.00 USD
Total Mileage	44.25 USD
Total Individual Receipts	120.00 USD
Total Travel Expenses	219.25 USD
Amount Reimbursed	219.25 USD
Amount Paid Out	219.25 USD

My Travel and Expenses (Delete a Expense Report)

After clicking the Delete button on the previous screen, you see a confirmation message explaining that the report has been deleted. Click the **Exit** button to return the My Trips and Expenses page.

The screenshot shows a web application interface for deleting an expense report. At the top, the title is "Delete Expense Report (215)". Below the title, it displays "Employee ALICE WONDERLAND (00008515)" and "Today's Date 10/02/2009". There are three buttons: "Previous Step", "Delete", and "Exit". The "Exit" button is highlighted with a red border. Below the buttons, a confirmation message is displayed: "The current version of trip 0000000215 was deleted - [Display Help](#)". At the bottom, there are three buttons: "Previous Step", "Delete", and "Exit".

Lesson 4 Summary

- You should now be able to:
 - Change a Travel Request
 - Change a Travel Expense Report
 - Copy a Travel Request
 - Copy a Travel Expense Report
 - Delete a Travel Request
 - Delete a Travel Expense Report



South Carolina Enterprise Information System

LESSON 5: Approve Employee Travel Requests

STATE INFORMATION
TECHNOLOGY



SC BUDGET AND CONTROL BOARD



SC BUDGET AND CONTROL BOARD

Lesson 5 Learning Objectives

- Upon completion of this lesson, you should be able to:
 - Access and Administer Employee Travel Requests and Travel Expenses

Approve Travel Requests/Expenses

South Carolina Enterprise Information System

When an employee submits Travel Requests or Expense Reports through Employee Self Service, their request is sent to Manager Self Service for approval. The process for approving employee Travel Requests and Expense Reports is the same. To begin, click on the employee's request for approval from the Tasks tab on the Universal Worklist (Manager Self Service home page).

Universal Worklist

Tasks (12 / 13) Alerts Notifications Tracking

Show: New and In Progress Tasks (12 / 13) Select a Subview... All Create Task Show Filters Hide Preview

Subject	From	Sent	Priority	Due	Status
Approve expense report of John D. Anderson	esstrain5,	Sep 22, 2009	Normal	1 Sep 27, 2009	New
Approve expense report of John D. Anderson	esstrain5,	Oct 13, 2009	Normal	2 Oct 18, 2009	New
Approve expense report of John D. Anderson	esstrain5,	Oct 13, 2009	Normal	2 Oct 18, 2009	In Progress
Approve expense report of John D. Anderson	esstrain5,	Yesterday	Normal	1 Oct 27, 2009	New
Approve trip request of John D. Anderson	esstrain5,	Yesterday	Normal	1 Oct 27, 2009	New
John D. Anderson's Leave Request	esstrain5,	Oct 21, 2009	Normal	1	New
John D. Anderson's Leave Request	esstrain5,	Oct 21, 2009	Normal	1	New
John D. Anderson's Leave Request	esstrain5,	Oct 12, 2009	Normal	1	New
John D. Anderson's Leave Request	esstrain5,	Oct 12, 2009	Normal	1	New
John D. Anderson's Leave Request	esstrain5,	Oct 10, 2009	Normal	1	New

Row 1 of 13

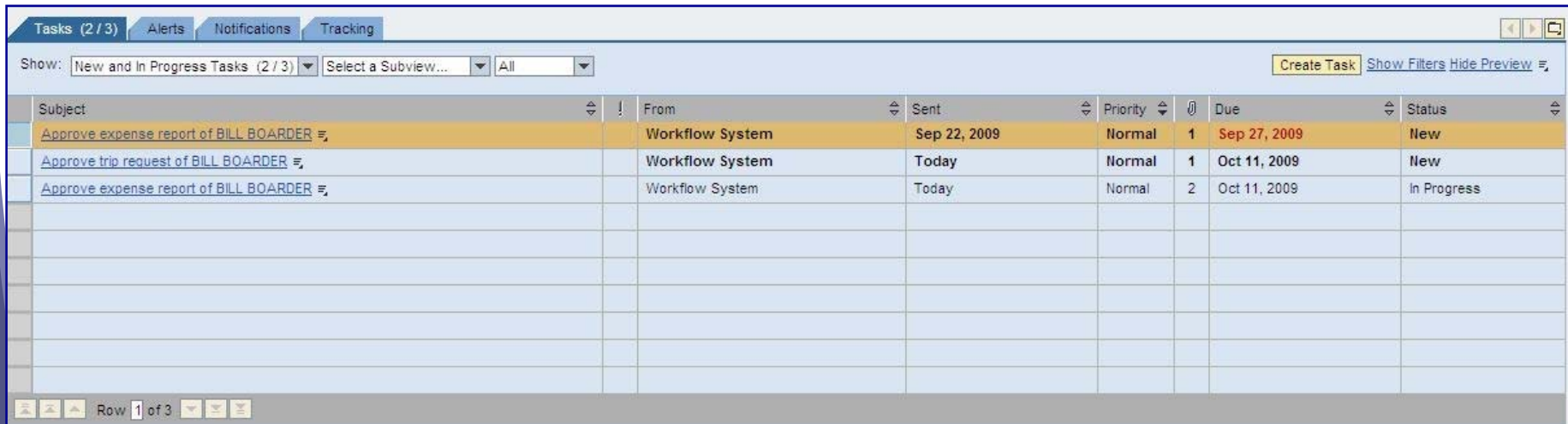
Approve Travel Requests/ Expenses

Travel Requests and Travel Report approvals are displayed in a manager's Universal Worklist, but unlike Leave Requests there are workflow rules tied to these items.

Approval Process for Travel Requests/Expenses:

- An employee submits a Travel Request/Report.
- The request displays in the manager's task list for five calendar days from date received.
- Manger has 5 days to act upon request, if not, it is automatically sent to next level of approver.
- This approver also has 5 days to act upon request. If no action occurs, it will be terminated.

Note: A reminder notification will be sent (via the Notifications tab) to the recipient manager after three calendar days if no action has been taken on the request. To initiate the approval process, the manager should select a request to review by clicking in the far left-hand column beside the corresponding request.



Subject	From	Sent	Priority	Due	Status
Approve expense report of BILL BOARDER	Workflow System	Sep 22, 2009	Normal	Sep 27, 2009	New
Approve trip request of BILL BOARDER	Workflow System	Today	Normal	Oct 11, 2009	New
Approve expense report of BILL BOARDER	Workflow System	Today	Normal	Oct 11, 2009	In Progress

Approve Travel Requests/ Expenses

After selecting a request to review, information and optional actions will display on the bottom half of the page.

Click the **Display Form** button to review a PDF of the request.


Approve expense report of BILL BOARDER

Trip Number: 0000000008
Sent: Today by Workflow System
Status: In Progress

Priority: Normal
Due: Oct 11, 2009

Personnel no.: 00008518 Trip no.: 0000000008
Trip begins: 07/24/2009 00:00:00
Trip ends: 07/24/2009 00:01:00
Reason: Security test MSSUSER3
Location:
Country: US - South Carolina
Total costs: USD 54.65
Advance: USD 0.00

Attachments

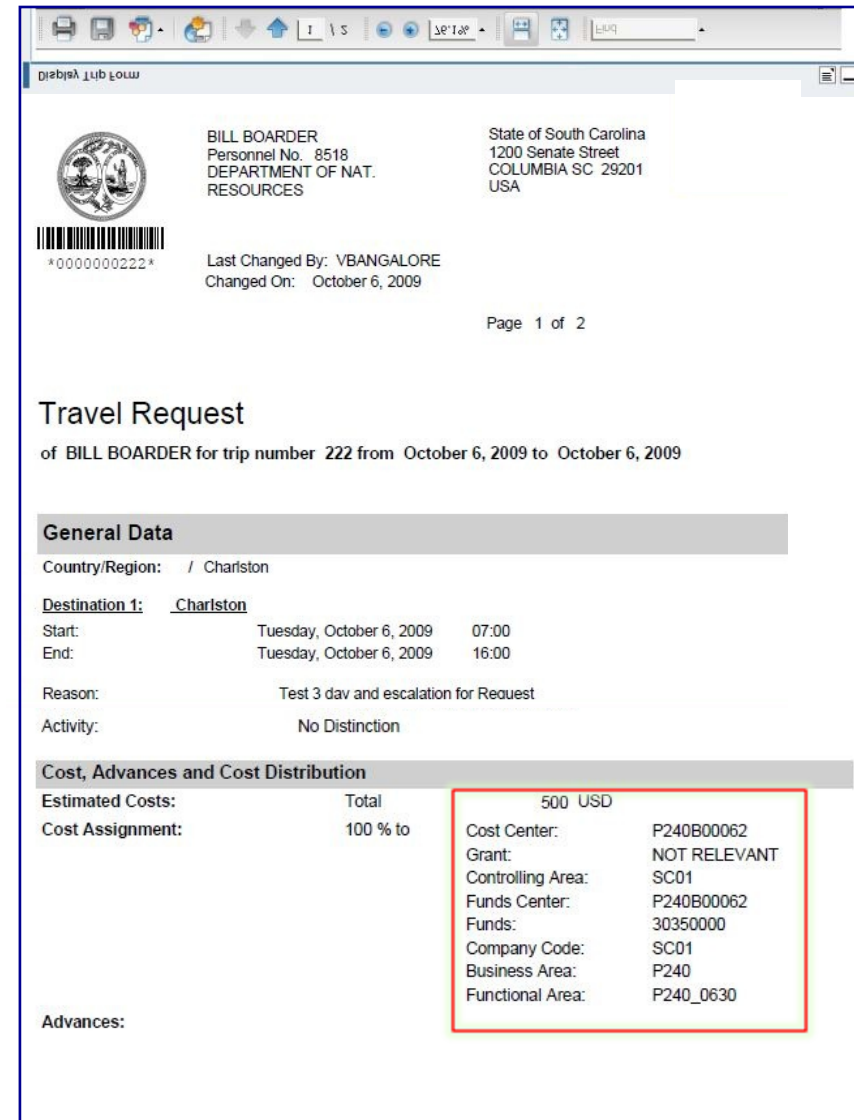
Type	Title
	EmployeeTrip: 0000000008

Approve expense report of BILL BOARDER:


Approve Travel Requests/ Expenses

After clicking the Display Form link from the previous screen, you can review the Travel Request, including the **Cost Assignment** to which the Expense Report is charged.

Note: It is important to verify the correct Cost Assignment is used. The Accounts Payable Department **CANNOT** make changes to the Cost Assignment assigned to an Expense Report. If an incorrect Cost Assignment is used, the Expense Report will be sent for corrections and may cause a delay in the reimbursement.



The screenshot shows a web browser window with a toolbar at the top. The page title is "Display Form". The main content area displays the following information:

 BILL BOARDER
Personnel No. 8518
DEPARTMENT OF NAT.
RESOURCES

State of South Carolina
1200 Senate Street
COLUMBIA SC 29201
USA

0000000222 Last Changed By: VBANGALORE
Changed On: October 6, 2009

Page 1 of 2

Travel Request

of BILL BOARDER for trip number 222 from October 6, 2009 to October 6, 2009

General Data

Country/Region: / Charleston

Destination 1: Charleston

Start: Tuesday, October 6, 2009 07:00
End: Tuesday, October 6, 2009 16:00

Reason: Test 3 day and escalation for Request
Activity: No Distinction

Cost, Advances and Cost Distribution

Estimated Costs:	Total	500 USD
Cost Assignment:	100 % to	

Cost Center:	P240B00062
Grant:	NOT RELEVANT
Controlling Area:	SC01
Funds Center:	P240B00062
Funds:	30350000
Company Code:	SC01
Business Area:	P240
Functional Area:	P240_0630

Advances:

Approve Travel Requests/ Expenses

Next, click the **Employee Trip** link in the **Attachments** section of the screen to view the attachments for the Travel Request/Expense Report.


Approve expense report of BILL BOARDER

Trip Number: 0000000008
Sent: Today by Workflow System
Status: In Progress

Priority: Normal
Due: Oct 11, 2009

Personnel no.: 00008518 Trip no.: 0000000008
Trip begins: 07/24/2009 00:00:00
Trip ends: 07/24/2009 00:01:00
Reason: Security test MSSUSER3
Location:
Country: US - South Carolina
Total costs: USD 54.65
Advance: USD 0.00

Attachments

Type	Title
	EmployeeTrip: 0000000008

Approve expense report of BILL BOARDER:

Approve Travel Requests/ Expenses

Click the **Services for Object** button from the upper right portion of the Launch SAP Transaction screen and then select **Attachment list**.

ALICE Thompson, PersNo. 8515, Trip No. 20030

Menu | Back | Cancel | System | Simulate | History | Infocenter: Contact Persons, Per Diems, Rates, ...

General Trip Data

From: 07/21/2009 00:00 Reason: []
End: 07/21/2009 00:01 City: []
Country: US Region: SC/SC
Posting Date: 07/30/2009

PD/FR Reimbursement


MI: 0
 Meals
Tty. S: [] TAc: []

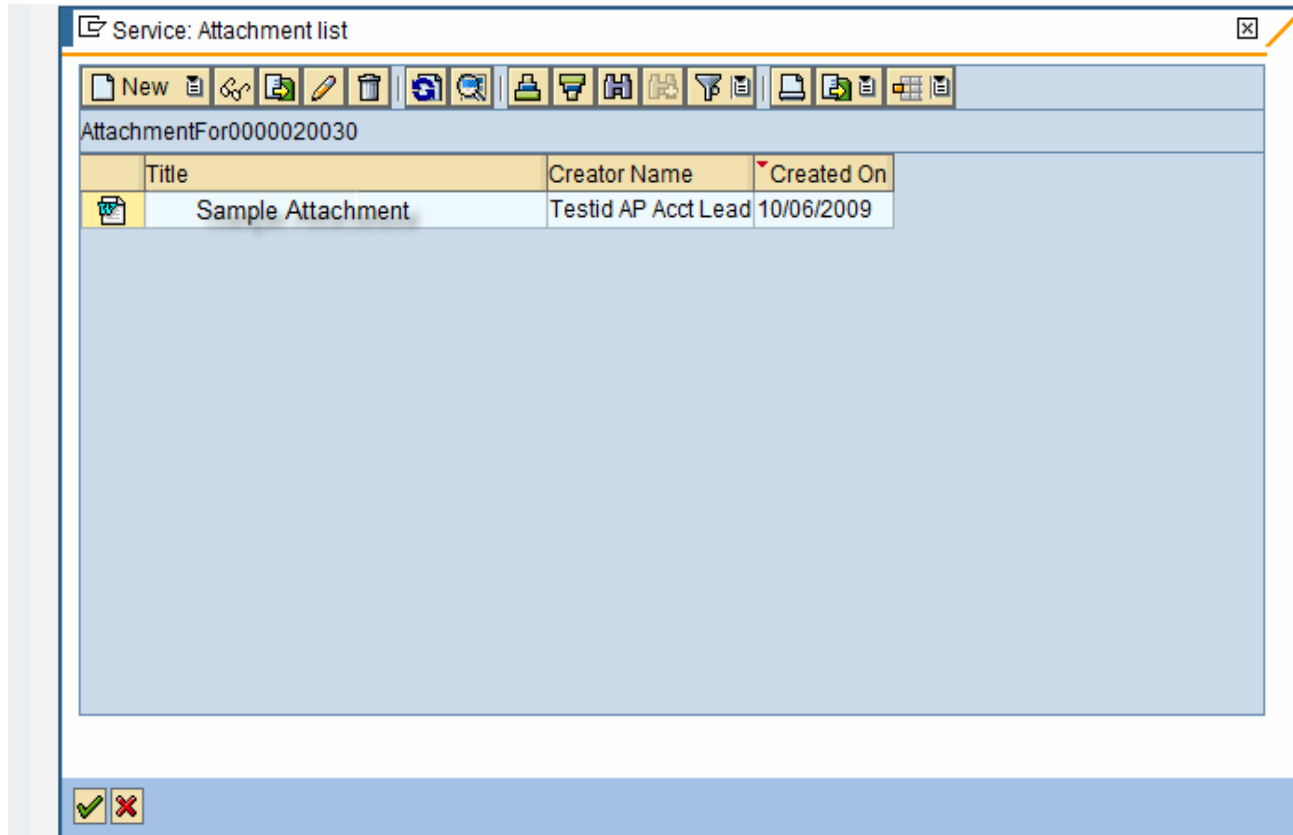
Alternative Cost Assignment for Entire Trip, If Different to Master CA

Receipts | Additional Destinations | Trip Segments | Deductions | Advances | Comments

No	R...	ExpTy	Name	P...	Amount	Currecy	Exch. Rate	Acco...	Date	Info
001	◇	MEAL	MEALS - MANUA	<input checked="" type="checkbox"/>	80.00	USD	1.00000	USD	07/21/2009	
002				<input type="checkbox"/>	0.00	USD		USD	07/21/2009	
003				<input type="checkbox"/>	0.00	USD		USD	07/21/2009	
004				<input type="checkbox"/>	0.00	USD		USD	07/21/2009	
005				<input type="checkbox"/>	0.00	USD		USD	07/21/2009	
006				<input type="checkbox"/>	0.00	USD		USD	07/21/2009	
007				<input type="checkbox"/>	0.00	USD		USD	07/21/2009	
008				<input type="checkbox"/>	0.00	USD		USD	07/21/2009	

Approve Travel Requests/ Expenses

To view the attachment(s), click the button to the left of the attachment information and click the **Display**  button. After viewing the attachment(s), close the Launch SAP Transaction screen



Approve Travel Requests/ Expenses

After reviewing the Travel Request/Report and attachments, you can:

- Approve,
- Return to employee for corrections, or
- Reject .

If a manager rejects or returns a request/report, he/she **MUST** enter the reason(s) in the text box field.

If you Approve the request you do NOT have to enter a reason, and the request will continue through the normal workflow process.


Approve expense report of BILL BOARDER

Trip Number: 0000000008
Sent: Today by Workflow System
Status: In Progress

Priority: Normal
Due: Oct 11, 2009

Personnel no.: 00008518 Trip no.: 0000000008
Trip begins: 07/24/2009 00:00:00
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Reason: Security test MSSUSER3
Location:
Country: US - South Carolina
Total costs: USD 54.65
Advance: USD 0.00

Attachments

Type	Title
	EmployeeTrip: 0000000008

Approve expense report of BILL BOARDER:

Approve expense report Send expense report back for corrections Reject expense report

Display Form Resubmit Forward Cancel Assignment

Lesson 6 Summary

- You should now be able to:
 - Access and Administer Employee Travel Requests and Travel Reports



South Carolina Enterprise Information System

COURSE SUMMARY

STATE INFORMATION
TECHNOLOGY

B & C B

SC BUDGET AND CONTROL BOARD



SC BUDGET AND CONTROL BOARD

Course Summary

- ① You should now be able to:
 - Navigate MySCEmployee to Access the Travel Management Function
 - Create, Change and Delete a Travel Request
 - Create, Change and Delete a Travel Expense Report
 - View and Print a Travel Expense Report
 - Access and Administer Employee Travel Requests and Travel Expenses (***Managers Only***)