myEMS (SAP) QUICK REFERENCE GUIDE



TRAVEL - REVIEW AND PRE-VERIFICATION FUNCTIONALIT

PURPOSE

This document illustrates how travel reviewers (recommenders) can pre-verify a Travel Request or Expense Report before it is approved.

REASONS FOR USING THIS OPTION

- It allows for reviewer to audit and enter comments to confirm pre-verification
- Reviewer can set the status to 'Save & Send' to trigger the approval without returning to the employee
- □ It does not issue an approval request to manager prior to review
- □ Manager receives approval request only once reviewer has actioned
- Comments entered by the reviewer are visible to the manager when reviewing the trip details

OVERVIEW OF STEPS

- 1) Reviewer must have "Travel Arranger" role in myEMS (SAP)
- 2) Employee creates request/claim and selects "Save Draft" (request not yet submitted)
- 3) Employee informs Reviewer of pending request/claim (via email or phone)
- 4) Reviewer updates trip document with comments for the approver
- 5) Reviewer selects "Save and Send for Approval" which triggers approval request
- 6) Manager receives approval notification
- 7) Manager approves
- **NOTE:** If the reviewer determines that there are corrections to be made, he can make them himself <u>OR</u> request the employee to make the changes and re-save (save draft) the request/claim.

Refer to the step-by-step "Quick Reference Guide"

Travel Arranger Role in myEMS (SAP) - System Access Requirements

- □ To proceed with *Travel Request* and *Expense Report* reviews, a reviewer must have been assigned the **Travel Arranger role**.
- □ To obtain the Travel Arranger role, you must first <u>register</u> via the Learning Management System (LMS) for the following required online training:
 - <u>TM01e Travel Management Business Overview</u>
 - TM02e Manage Travel Requests and Expense Reports
- □ Then submit a request online via "Report an incident" in myEMS (SAP) Portal in order to have the Travel Arranger role assigned to reviewer's profile



Once the user has the role, a new 'tab' called 'Travel Arranger' will appear in the myEMS (SAP) Portal.

maSGE	🝁 myEMS							-	Français	Log off
	vard 🕨 View Help								Welcome: Roxa	nne Dore
Ð		D	E	E	D	E	D	D	D	
Self-Service	Employee Self-Service	Budgeting	Special Payments	Master Data Maintenance	Reporting	Financial Signing Authority	Materials Management	Cash Receipts	Travel Arranger	Ľ

This area allows to process, review, and monitor travel transactions for any employee.

Travel Process Flow to be followed

1. TRAVELLER creates Travel Request/Claim and saves as 'DRAFT'

- □ Traveller creates *Travel Request / Expense Report* in myEMS (SAP).
- At the end of the process, Traveller selects the 'Save Draft' option.
 This will ensure that the request/claim is saved but NOT yet routed to the approving manager.

(REMINDER: 'Save & Send for Approval' routes the Travel Request immediately for manager approval).



2. Ready for Review

Once the *Travel Request / Expense Report* is saved, the Employee then informs his reviewer of the Travel Request/Expense Report <u>number</u> he has created and which is ready for review.



3. Adding traveller to Travel Arranger List

- **D** Reviewer must add traveller to Travel Arranger Processing List.
- □ To add employee, click on the 'Travel Arranger' link.

D	D	D	D	D	D	D	D	Ð	
Self-Service	Employee Self-Service	Budgeting	Special Payments	Master Data Maintenance	Reporting	Financial Signing Authority	Materials Management	Cash Receipts	Travel Arranger
Overview	Travel Assistant Work Center								
Travel A	rranger > Overview								Full Screen Optio
								Re	port an Incident myEM
Trav	el Arranger								
		1							
ļ	Travel Arranger	<u></u>							
	Request and arrange Center.	e travel on beh	alf of other employees	, using the Travel Assistar	nt Work				

"Employee List" displays previously-added employees.

NOTE: This list <u>DOES NOT</u> already come pre-populated so it may not contain any names the first time you display it. You must **add** and **remove employees** as required. There are no restrictions as to whom you can add to the list.

□ To add a new employee for travel review, click 'Add Employee(s)'.

Over	Overview Travel Assistant Work Center							
Trav	Travel Arranger > Travel Assistant Work Center							
					Report a			
_								
	imployee List							
	View: ESDC Add Employee(s) Remove Employee(s)							
TC.	J Last Name (Surname)	First Name	Personnel No.	Cost Center	Cost Center Name			
	Hu	Henry	86000002	200120	Aging Soc Disability			
	Training	Sylvain	87000015	201100	Prog Pol Development			
	Smith-Cox-Steven-Lewisrox	Andrew	89000003	205200	Business Rel. Man.			
	Chen	Zebing	89000004	200030	Min HRSDC Dept Staff			
	Chen	Xiang	89000007	200480	Data Strategies			

Overview Travel Assistant Work Center				
Travel Arranger > Travel Assistant Work Center				
				Report
Employee List				
View: ESDC Add Employee(s) Remove Em	ployee(s)			
Last Name (Surname)	First Name	Personnel No.	Cost Center	Cost Center Name
Hu	Henry	8600002	200120	Aging Soc Disability
Training	Sylvain	87000015	201100	Prog Pol Development
Smith-Cox-Steven-Lewisrox	Andrew	8900003	205200	Business Rel. Man.
Chen	Zebing	89000004	200030	Min HRSDC Dept Staff
Chen	Xiang	8900007	200480	Data Strategies

4. Selecting the employee

Once the employee name has been added, select the employee.
 The employee's trip history will be presented below.

vei A	rranger > Travel #	Assistant Work Center							Full Screen	Optioi	
								Repo	ort an Incident m	iyEM	
Em	niovee List										
Vie	w: ESDC	 Add Employe 	e(s) Remove Employee	P(0)							
12 Last Name (Surname)		First Name		Personnel N	o.	Cost Center	Cost Center Name				
i i	Carter		Garr	Y	89000019		201200	Dir Prog Ops			
Π.	Julien		Claux	le	89000205		200930	Admin Support			
	Dore		Nath	slie	89000213		201020	Operations	Operations		
	Dore		Roxe	nne	99000001		200030	Min HRSDC Dept Statt	Min HRSDC Dept Statt		
	Duquette 🔪		Pierre	•	99000002		200030	Min HRSDC Dept Staff			
oet	ails of: Pierre Duq Travel Requests	uette (46) Expense Re	ports(25)								
Det	ails of: Pierre Duq Travel Requests	(46) Expense Re	ports(25)	Columna I - Croste News	Travel Request	one to Officer Employees				5	
Det	ails of: Pierre Duq Travel Requests View: ESDC	(46) Expense Re	ports(25) hint Change Copy I	Delete Create New	Travel Request	opy to Other Employee	Processing Status	Expense Report	History	S	
Pet /	ails of: Pierre Duq Travel Requests /iew: ESDC Trip Number 1000000928	(46) Expense Re Display# Start Date 2014-03-31	Mint Change Copy I End Date 2014-03-31	Destroyion Ottawa	Travel Request C Reason Test	opy to Other Employee Approval Status Request Approved	Processing Status transferred to FI	Expense Report Display	History	S	
vet v	Alls of: Pierre Duce Travel Requests View: ESDC Trip Number 100000925 100000927	(46) Expense Re	hint Change Copy I End Date 2014-03-31 2014-03-30	Celete Create New Destination Ottawa Ottawa	Travel Request C Reason Test test	Approval Stelus Request Approved Request Approved	Processing Status transferred to FI FI post canceled	Expense Report Crastav. Classiav.	History Display	S	
Det V	Alls of: Pierre Duq Travel Requests View: ESDC Trip Number 1000000925 100000925	Cispense Re • Cispeny/F Start Date 2014-03-31 2014-03-20 2014-03-29	Ports(25) Vinit Change Copy 1 End Date 2014-03-31 2014-03-30 2014-03-20	Destination Ottawa Ottawa Ottawa	Travel Request C Reason Test test Travel	Approval Status Request Approved Request Approved Request Approved	Processing Status transferred to FI FI post canceled in Processing	Expense Report Display Display Change	History Display Display Display	S	
Det	Alls of: Pierre Diago Travel Requests View: ESDC Trip Number 1000000928 1000000929 1000000928	Claptor (46) Expense Re • Display/8 Start Date 2014-03-31 2014-03-30 2014-03-29 2014-03-29 2014-03-28	Ports(25) Print Change Copy 1 End Date 2014-03-31 2014-03-30 2014-03-29 2014-03-29	Celeber Create New Destination Ottawa Ottawa Ottawa betevite	Travel Request C Reason Test test Travel test	Approval Status Request Approved Request Approved Request Approved Request Reproved	Processing Status transferred to PI PI post canceled in Processing Retessed for Approved	Expense Report Display Display Chenze Create	History Display Display Display Display	2	
Det 1	Alls of: Pierre Diago Travel Requests View: ESDC Trip Number 100000028 100000027 100000025 1000000011 100000010	Image: Control of the second	ports(25) End Date 2014-03-31 2014-03-30 2014-03-29 2014-03-26 2014-03-26	Celete Create New Destination Ottawa Ottawa Ottawa Detevile Ottawa	Travel Request C Reason Test test Travel test	Approval Status Request Approved Request Approved Request Approved Request Approved Request Recorded	Processing Status transferred to FI FI post canceled in Processing Released for Approval Released for Approval	Expense Report Crastav. Diastav. Sbanaz. Crasta Crasta	History Display Display Display Display	3	
Det 1	Alts of: Pierre Dage Travel Requests View: ESDC Trp Number 1000000928 1000000928 1000000911 1000000910 1000000910	Lette Expense Re Image: Comparison of the second sec	perts(25) Vint Charge Copy J End Date 2014-03-31 2014-03-30 2014-03-29 2014-03-26 2014-03-26	Create New Destination Ottavva Ottavva Ottavva Detevite Ottavva Monireal	Travel Request C Reason Test test test test test test test	Approval Status Request Approved Request Approved Request Approved Request Recorded Request Recorded Request Recorded	Processing Status transferred to FI FI post annohid In Processing Released for Approval Released for Approval	Expense Report Databay Stansar Create Create Create	History Display Display Display Display Display Display	2	
Pet	atts of: Pferre Durp Travel Requests //ew: ESDC Trip Number 1000000928 1000000929 1000000929 1000000911 1000000910 1000000909	Composition Expense Ref Classing Classing Start Date 2014-03-31 2014-03-20 2014-03-26 2014-03-25 2014-03-26 2014-03-25 2014-03-25	ports(25) ind Charge Copy J End Date 2014-03-31 2014-03-20 2014-03-26 2014-03-26 2014-03-26 2014-03-25	Celebe Create New Destination Ottawa Ottawa Ottawa Estevale Ottawa Montreal Toronto	Travel Request C Reason Tost test test test test test Test	Approvel Status Approvel Status Request Approved Request Approved Request Reproved Request Recorded Request Recorded Request Recorded	Processing Status transferred to FI FI post canceled In Processing Released for Approval Released for Approval Released for Approval Released for Approval	Expense Report Dissiby Dissiby Standar Create Create Create	History Crastiny Disabley Crastiny Crastiny Crastiny Disabley Disabley	2	

5. Reviewing a Travel Request / Expense Report

Review Travel Request

To review a *Travel Request*, you must ensure that you are selecting trip data from the 'Travel Requests' tab

1	En	nployee List					
	V	/iew: ESDC Add Employee(s) Remove En	nployee(s)				7
	Ē	Last Name (Surname)	First Name	Personnel No.	Cost Center	Cost Center Name	2
		Julien	Claude	89000205	200930	Admin Support	
		Dore	Nathalie	89000213	201020	Operations	
		Dore	Roxanne	99000001	200030	Min HRSDC Dept Staff	Г
		Duquette	Pierre	99000002	200030	Min HRSDC Dept Staff	
		UVT Demo_RD	Travel	99000020	201100	Prog Pol Development	i.
		tails of: Travel UVT Demo_RD					
		Travel Requests(157) Expense Reports(54)					_
I.		View: ESDC I Display/Print Change C	opy Delete Create New Trave	el Request Copy to Other Employee			8

Review Expense Report

To review an *Expense Report*, you must ensure that you are selecting trip data from the 'Expense Reports' tab

Last Name (Surname)	First Name	Personnel No.	Cost Center	Cost Center Name		
Julien	Claude	89000205	200930	Admin Support		
Dore	Nathalie	89000213	201020	Operations		
Dore	Roxanne	99000001	200030	Min HRSDC Dept Staff		
Duquette	Pierre	99000002	200030	Min HRSDC Dept Staff		
UVT Demo_RD	Travel	99000020	201100	Prog Pol Development		
etails of: Travel UVT Denge_RD						
Travel Requests(157) Expense Reports (54)						

5. Reviewing a Travel Request / Expense Report - Cont'd

- □ Select the Trip Number to be reviewed
- Click 'Change'

Employee List								
View; ESDC Add Employee(s) Remove Employee(s)								
Last Name (Surname)	First Name	Personnel No.	Cost Center	Cost Center N	lame			
Julien	Claude	89000205	200930	Admin Suppo	rt			
Dore	Nathalie	89000213	201020	Operations	Operations			
Dore	Roxanne	99000001	200030	Min HRSDC D	ept Staff			
Duquette	Pierre	9900002	200030	Min HRSDC D	ept Staff			
UVT Demo_RD	Travel	99000020	201100	Prog Pol Deve	elopment			
Details of: Travel UVT Demo RD								
Travel Requests (157) Ex	Travel Requests (157) Expense Reports (54)							
View: ESDC	View: ESDC Display.Print Change Copy Delete Create New Travel Request Copy to Other Employee							
Trip Number Start Date	End Date Change Destination	Reason	Approval Status	Processing Status	Expense Report	History		
1000000935 2014-04-12	2014-04-14 Calgary	Training - SC College course	Request Approved	Released for Approval	Change	Display		
100000024 2014 04 07	2014 04 07 oodfood	foodo	Postupat Reported	Released for Approval	Create	Dioplay		

- □ Review the document and if required, make the necessary adjustments
- □ Add comments to the document by using the 'Comment' field to note review comments & confirmation. These comments will be visible to the approving manager once the trip document is submitted.

Overview Travel Assistant Work Cent	
Travel Arranger > Travel Assistant Work Ce	riter
General Data	
Start Date: *	2014-04-12 😨 00:01
End Date:	2014-04-14 😨 24:00
Destination	
Country / Region: *	CA-Alberta 👻
Destination: *	Calgary
Additional Destinations:	No destinations entered Enter Additional Destinations
Travel Authorities	
Travel & therization blumber (TAb) Remited	
Offiline TAN Issued	·
Additional Information	
Category of Travel: *	Direct Delivery Core Mandate
Extended Stay:	Utilize 'comment' area to note
Activity: *	Training review comments &
Local or Non-Local: *	Non-Local Travel Continuation
Reason: *	Training - SC College course
Estimated Costs:	715.00 CAD Enter Estimated Costs
Comment:	SC College Reviewer-RDORE: confirm review of document; ready for management
	approval
Advances:	0.00 Canadian Dollar Enter Advances
Cost Assignment: *	100.00 % Cost Center 201100 (Prog Pol Development), Funds Center 201100 (Prog Pol De Change Cost Assignment

6. Save and Send for Approval

Once review is complete, set the status to 'Save and Send for Approval' to trigger the approval request to the manager.

NOTE: Employee will be notified via email that you have submitted a request or claim on his behalf.

Change Travel Request (10000	00935)
General Data Review and Send Completed	
Employee Travel UVT Demo_RD (99000020) Start Date 2014-04-	12 End Date 2014-04-14
Previous Step Save and Send for Approval	
Document check - no errors: TRAVL 100000093599000020 K1LCLNT1	10 – Display Help
Final Action Save Draft I only want to save my travel request Save and Send for Approval	and send it later send it now for further processing
I confirm that I have entered all d	ata to the best of my knowledge
Summary	
Estimated Costs	715.00 CAD
Total Cost of Expense Report	0.00 CAD
Estimated Cost From Travel Request	715.00 CAD
Cost Difference between Expense Report and Travel Request	0.00 CAD