



## myEMS (SAP) QUICK REFERENCE GUIDE

### TRAVEL - REVIEW AND PRE-VERIFICATION FUNCTIONALITY

#### 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

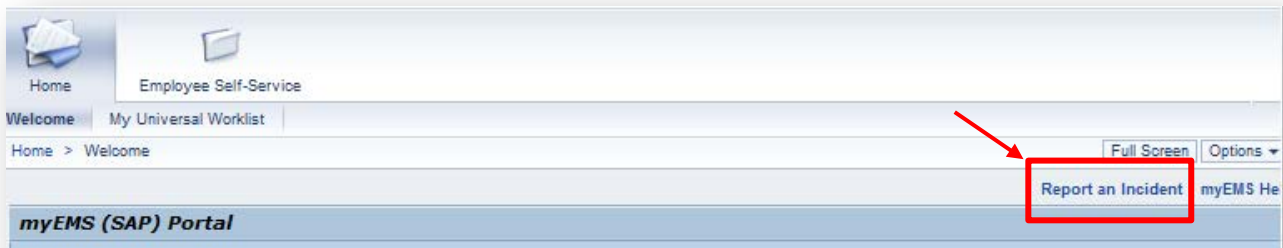
- 1) Reviewer must have "Travel Arranger" role in myEMS (SAP)
- 2) Employee creates request/claim and selects "**Save Draft**" (request not yet submitted)
- 3) Employee informs Reviewer of pending request/claim (via email or phone)
- 4) Reviewer updates trip document with comments for the approver
- 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 OR request the employee to make the changes and re-save (save draft) the request/claim.

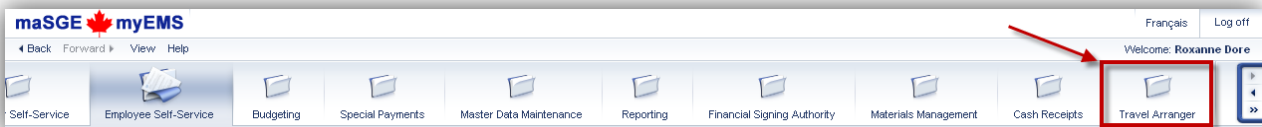
**Refer to the step-by-step "Quick Reference Guide"**

## 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 **register** via the Learning Management System (LMS) for the following required **online training**:
  - **TM01e** – Travel Management Business Overview
  - **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](#).



- 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).

1 General Data      2 Review and Send      3 Completed

Employee Travel UVT Demo\_RD ( 99000020 )      Start Date 2014-04-12      End Date 2014-04-14

Previous Step      Save Draft

⚠ Trip has already taken place. Please delete expense type EST from 20140412

**Final Action**

Save Draft      I only want to save my travel request and send it later

Save and Send for Approval      I want to save my travel request and send it now for further processing

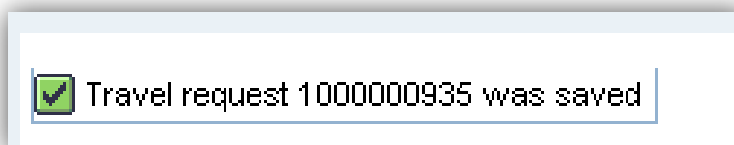
**I confirm that I have entered all data to the best of my knowledge**

**Summary**

Total Individual Receipts	715.00 CAD
<b>Total Travel Expenses</b>	<b>715.00 CAD</b>
<b>Amount Reimbursed</b>	<b>715.00 CAD</b>
<b>Amount Paid Out</b>	<b>715.00 CAD</b>
<b>Estimated Costs</b>	<b>715.00 CAD</b>

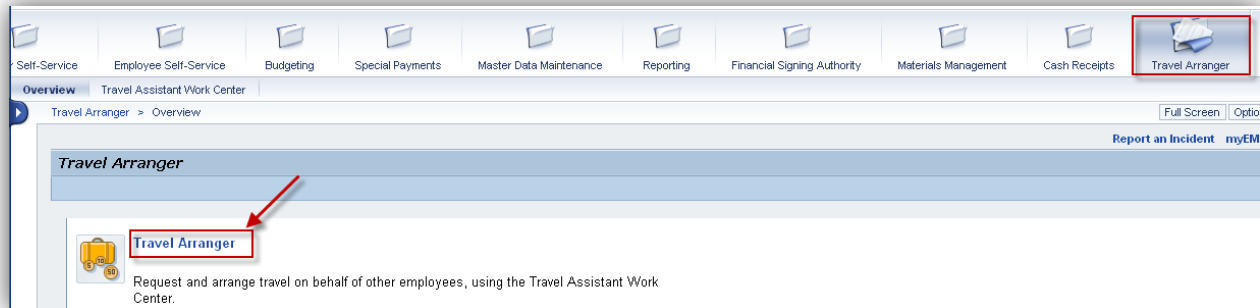
## 2. Ready for Review

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



### 3. Adding traveller to Travel Arranger List

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



- ❑ "Employee List" displays previously-added employees.

**NOTE:** This list DOES NOT 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)'.

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

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## 4. Selecting the employee

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

The screenshot shows the 'Employee List' and 'Travel Requests' sections. In the 'Employee List', the row for 'Duquette, Pierre' is highlighted in yellow. Below it, the 'Travel Requests' table is displayed with the following data:

Trip Number	Start Date	End Date	Destination	Reason	Approval Status	Processing Status	Expense Report	History
1000000926	2014-03-31	2014-03-31	Ottawa	Test	Request Approved	Transferred to FI	<a href="#">Display</a>	<a href="#">Display</a>
1000000927	2014-03-30	2014-03-30	Ottawa	test	Request Approved	FI post canceled	<a href="#">Display</a>	<a href="#">Display</a>
1000000926	2014-03-29	2014-03-29	Ottawa	Travel	Request Approved	In Processing	<a href="#">Change</a>	<a href="#">Display</a>
1000000911	2014-03-25	2014-03-25	beleville	test	Request Recorded	Released for Approval	<a href="#">Create</a>	<a href="#">Display</a>
1000000910	2014-03-25	2014-03-25	Ottawa	test	Request Recorded	Released for Approval	<a href="#">Create</a>	<a href="#">Display</a>
1000000909	2014-03-26	2014-03-26	Montreal	test	Request Recorded	Released for Approval	<a href="#">Create</a>	<a href="#">Display</a>
1000000900	2014-03-25	2014-03-25	Toronto	Test	Request Recorded	Released for Approval	<a href="#">Create</a>	<a href="#">Display</a>
1000000907	2014-03-24	2014-03-24	Montreal	Test	Request Approved	Approved	<a href="#">Create</a>	<a href="#">Display</a>

## 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

The screenshot shows the 'Employee List' with the 'UVT Demo\_RD' row highlighted. Below the list, the 'Travel Requests(157)' tab is selected and highlighted with a red box. The 'Expense Reports(54)' tab is also visible.

### Review Expense Report

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

The screenshot shows the 'Employee List' with the 'UVT Demo\_RD' row highlighted. Below the list, the 'Expense Reports (54)' tab is selected and highlighted with a red box. The 'Travel Requests(157)' tab is also visible.

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

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

The screenshot shows the SAP Employee List interface. At the top, there is a dropdown menu for 'View: ESDC' and buttons for 'Add Employee(s)' and 'Remove Employee(s)'. Below this is a table with columns: Last Name (Surname), First Name, Personnel No., Cost Center, and Cost Center Name. The table lists several employees, with the last row highlighted in yellow: UVT Demo\_RD, Travel, 99000020, 201100, Prog Pol Development.

Below the table is a section titled 'Details of: Travel UVT Demo\_RD'. It has two tabs: 'Travel Requests (157)' and 'Expense Reports (54)'. The 'Travel Requests (157)' tab is active. It shows a 'View: ESDC' dropdown and buttons for 'Display/Print', 'Change', 'Copy', 'Delete', 'Create New Travel Request', and 'Copy to Other Employee'. Below this is a table with columns: Trip Number, Start Date, End Date, Destination, Reason, Approval Status, Processing Status, Expense Report, and History. The first row is highlighted in yellow: 100000935, 2014-04-12, 2014-04-14, Calgary, Training - SC College course, Request Approved, Released for Approval, Change, Display. A red box highlights the 'Change' button in the top toolbar and the 'Change' button in the table header.

- ❑ 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.

The screenshot shows the SAP Travel Assistant Work Center form. It has a 'General Data' section with 'Start Date: 2014-04-12 00:01' and 'End Date: 2014-04-14 24:00'. The 'Destination' section has 'Country / Region: CA-Alberta' and 'Destination: Calgary'. The 'Travel Authorities' section has 'Travel Authorization Number (TAN) Required: [checked] TAN: CCC100104'. The 'Additional Information' section has 'Category of Travel: Direct Delivery Core Mandate', 'Activity: Training', 'Local or Non-Local: Non-Local Travel', and 'Reason: Training - SC College course'. The 'Estimated Costs' section shows '715.00 CAD' and a button 'Enter Estimated Costs'. The 'Comment' field is highlighted with a red box and contains the text: 'SC College Reviewer-RDORE: confirm review of document, ready for management approval'. A red arrow points from a text box to the comment field. The text box contains the text: 'Utilize 'comment' area to note review comments & confirmation'.

## 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 ( 100000935 )

1 General Data → 2 **Review and Send** → 3 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 10000093599000020 K1LCLNT110 - [Display Help](#)

**Final Action**

Save Draft I only want to save my travel request and send it later

**Save and Send for Approval** I want to save my travel request and send it now for further processing

**I confirm that I have entered all data to the best of my knowledge**

**Summary**

Estimated Costs	<u>715.00 CAD</u>
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