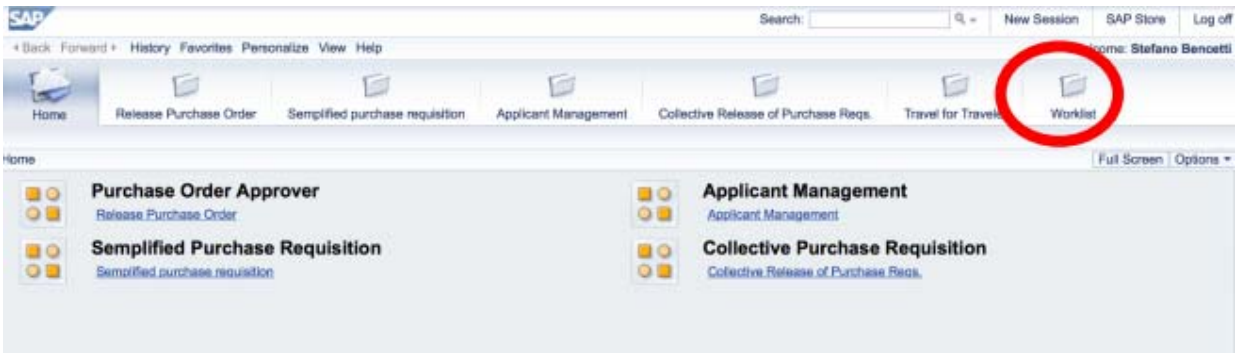
SAP USER GUIDE – WEB APPROVAL OF TRAVEL REQUESTES AND EXPENSES

1. INITIAL OPERATIONS

To access the SAP Portal click on the following link: https://service.iit.it:5000/irj/portal

Enter User ID (ex. piero.parodi@iit.it) and Password – same as log on your PC and click **Log-On**.

You'll see the following initial page:



The Worklist Button is to open the management of travel approvals.

1.2 TRAVEL REQUESTS AND EXPENSES NOTES

When travelling, your resources need to receive authorization from you before departure. They (or your administrative staff on their behalf) have to fill in a travel request in the ERP SAP System.

You will then receive an e-mail (from sistema workflow) with all the details of the travel (resource name, starting and ending dates, destination, kind of activity, reason, any comment added, estimated costs of the trip, cost center and project on which costs are to be assigned, amount of the advance payment in case it has been requested, details of the congress in case the inscription is to be paid by the accounting office in advance).

The mail will also contain the web address of the portal so that you can be redirected to the portal through it.

Once the travel is over, your resources (or your administrative staff on their behalf) have to fill the expenses note in the ERP SAP System, declaring all the expenses held during the trip that are to be reimbursed. Your administrative staff checks the compliancy with the IIT travel policy (nature of the expenses, reimbursement limits) and, once the check is ok, you need to approve the expenses note.

You will receive an e-mail (from sistema workflow) with all the details of the travel (resource name, starting and ending dates, destination, reason, any comment added, total costs of the trip, sum to be directly reimbursed, cost centre and project on which costs have been assigned).

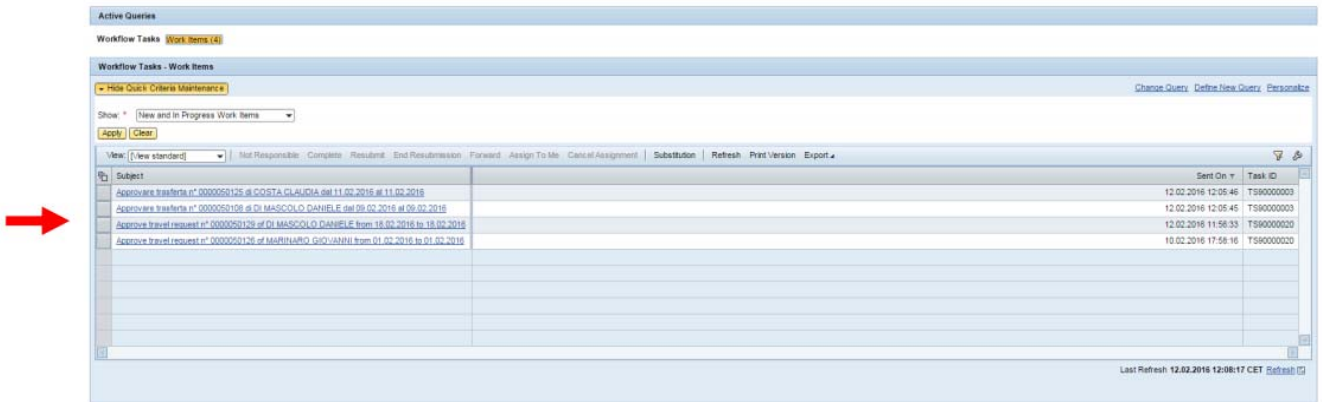
The mail will also contain the web address of the portal so that you can be redirected to the portal through it.

1.2 HOW TO APPROVE/REJECT A TRAVEL REQUEST OR AN EXPENSES NOTE

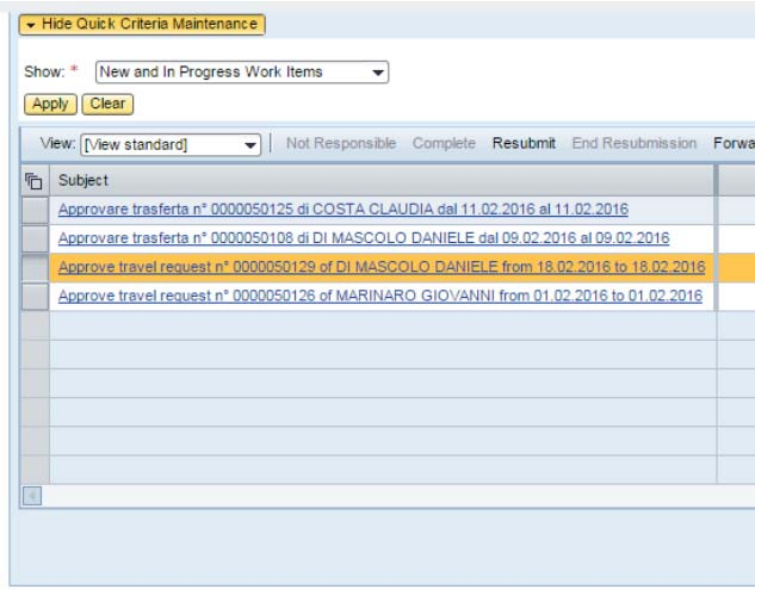
From the Homepage of the portal click on Worklist.
The system will display a worklist of all items that need your intervention.

The list may have two kind of owrk items workitems, their subjet is:

- **Approve Travel Request n°….. of …….. from ….. to** = approve a travel request before departure;
- **Approve Travel n°…… of …….. from ….. to** = approve the expenses notes presented at the end of the travel.



By highlighting the item line (clicking on the square at the left side), at the bottom of the page you will see all the details. Both the travel request



Approve travel request n° 0000050129 of DI MASCOLO DANIELE from 18.02.2016 to 18.0

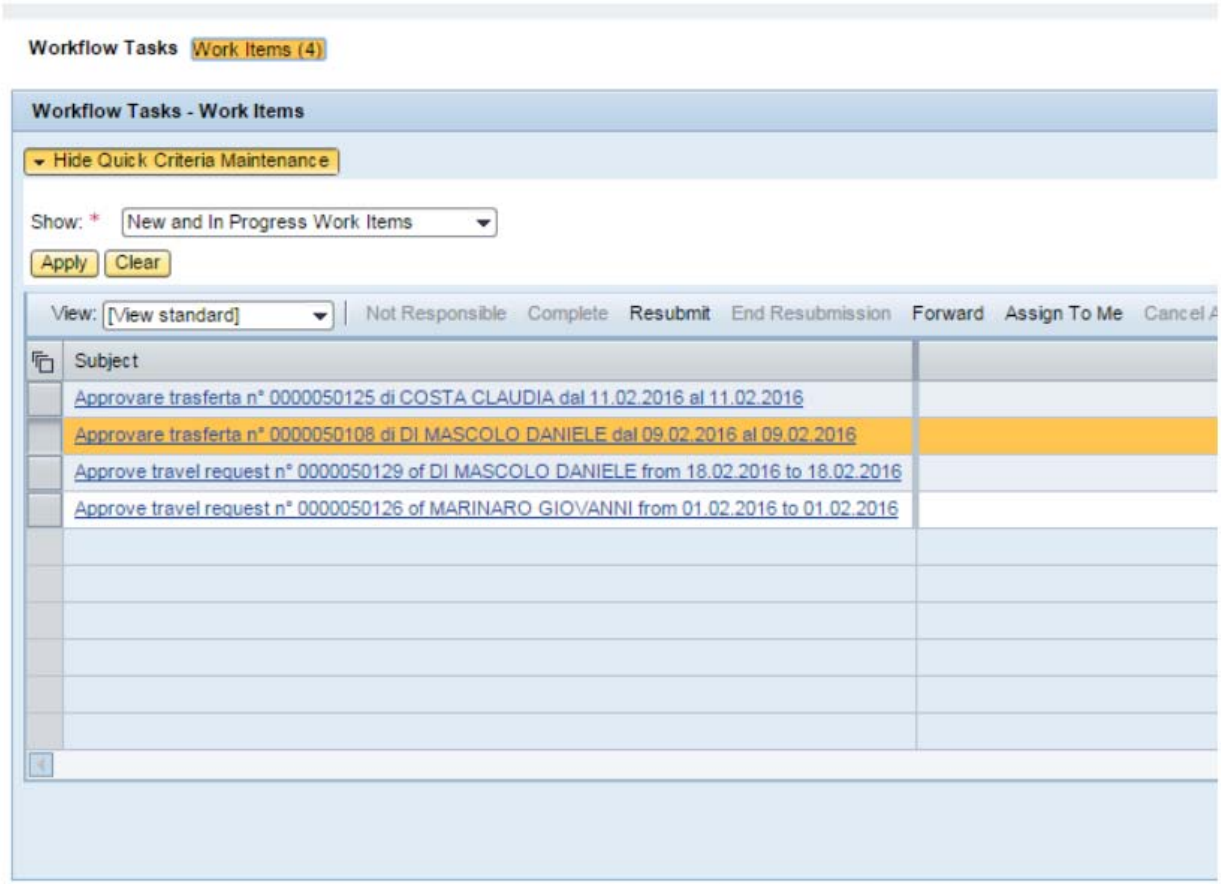
Sent: Status: New
Priority: Medium

Personnel no.: 10002338 Trip no.: 0000050129
Trip begins: 18.02.2016 08:00:00
Trip ends: 18.02.2016 23:00:00
Reason: prova
Country: Italy
Location: roma

Reason : prova
Activity :
Note :

Total costs: € 50,00
Cost center assignment :
100,00 2607 Validation 00001431 EPUE010001

And for the expenses note; in this second case, in particular, you can see the actual expenses note document, by clicking on the attachment:



Approvare trasferta n° 0000050108 di DI MASCOLO DANIELE dal 09.02.2016 al 09.02.2016

Sent: Status: New
Priority: Medium

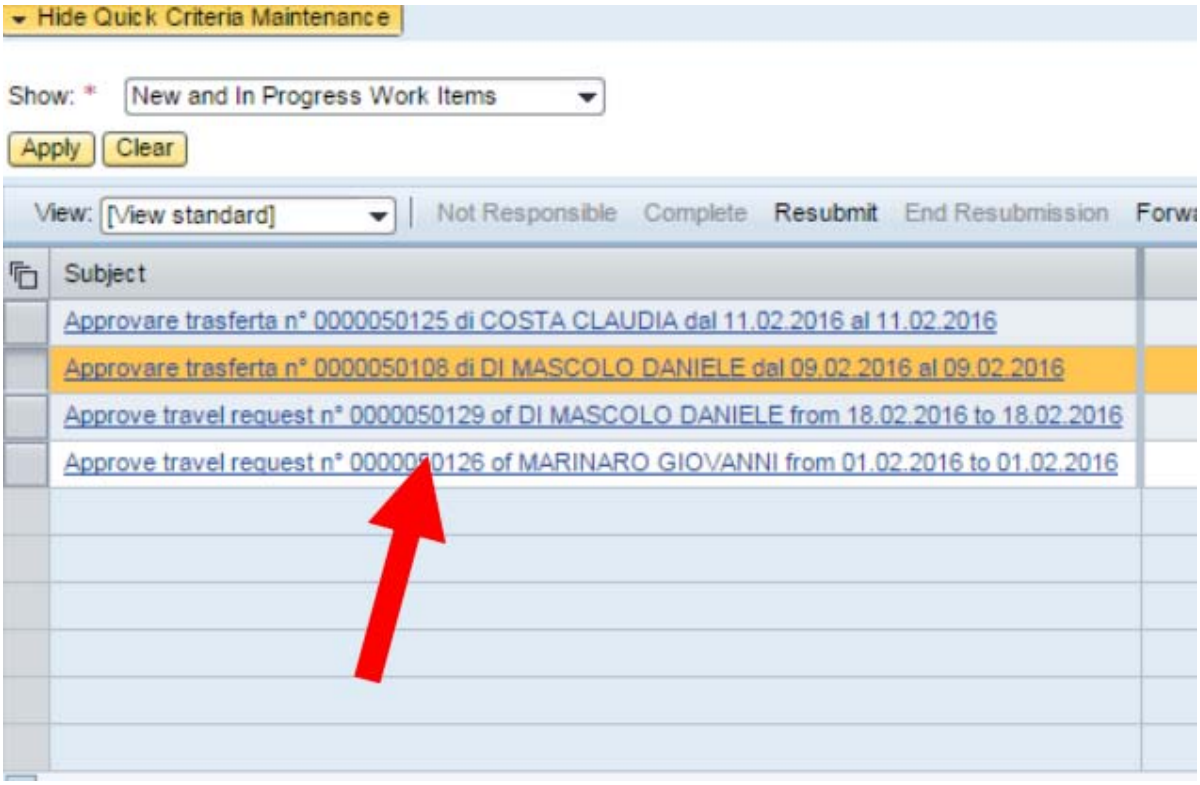
Personnel no.: 10002338 Trip no.: 0000050108
Trip begins: 09.02.2016 Trip ends: 09.02.2016
Country: Italy
Location: Vigorso di Budrio (BO) – Centro Protesi

Cost center assignment :
100,00 2607 Validation 00001431 EPUE010001

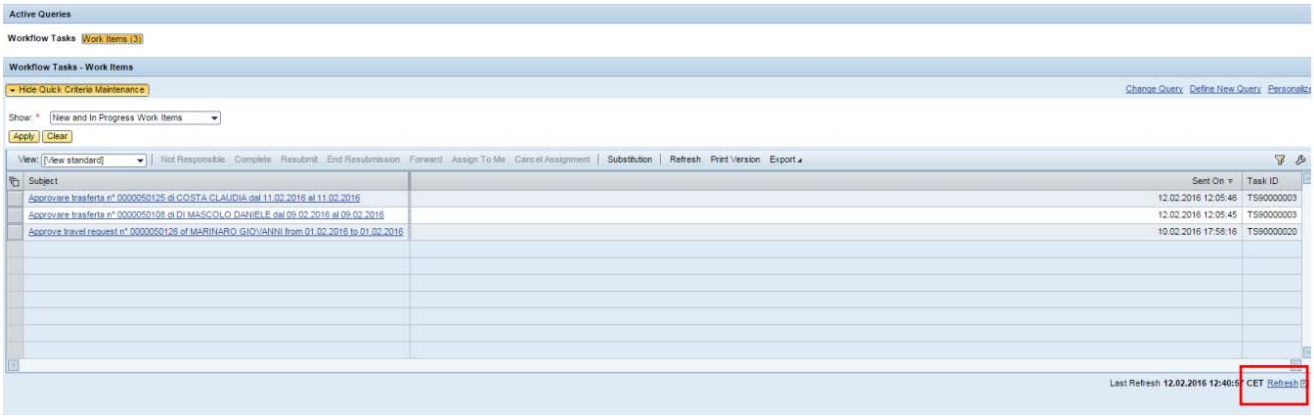
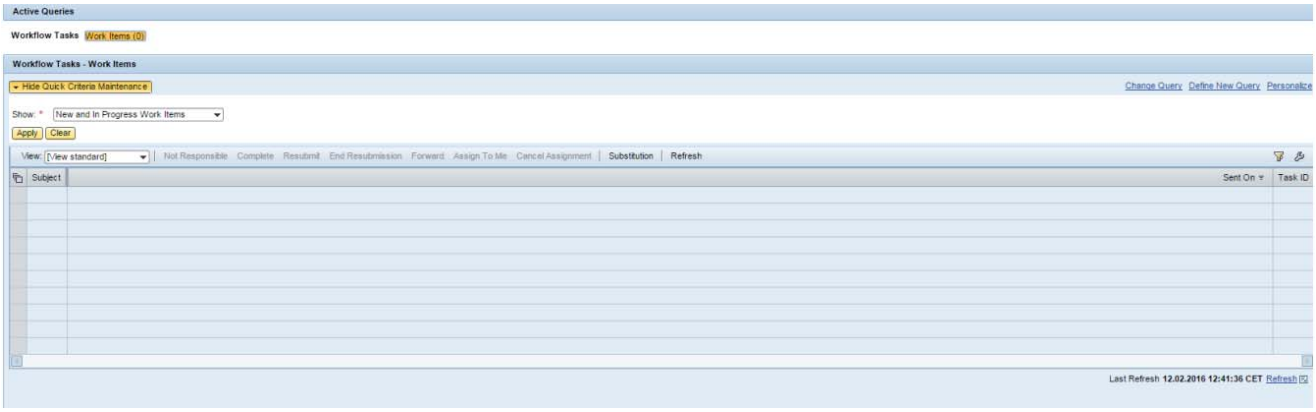
Sum to be reimbursed: € 6,50
Travel total cost: € 6,50
Expenses limit exceeded: NO

Attachments
Attachment

By clicking on the line, a pop-up appears:



You may, by selecting the appropriate line and clicking "OK", approve or send back the request to the employee. The button "cancel" brings you back to the previous screen.



By clicking on the Refresh button, the list will be updated.