

SAP USER GUIDE – WEB APPROVAL OF TRAVEL REQUESTES AND EXPENSES

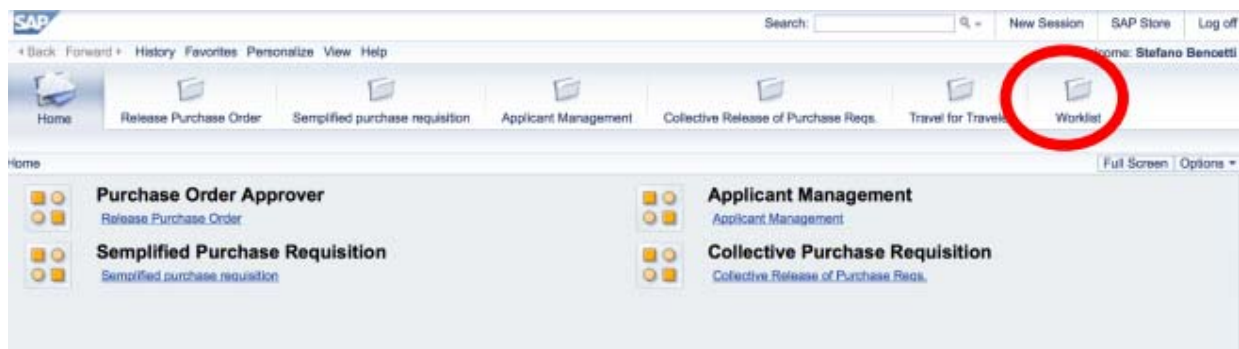
1. INITIAL OPERATIONS

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.



Active Queries

Workflow Tasks **Work Items (4)**

Workflow Tasks - Work Items

Hide Quick Criteria Maintenance

Show: * New and In Progress Work Items

Apply Clear

View: [New standard] | Not Responsible | Complete | Resubmit | End Resubmission | Forward | Assign To Me | Cancel Assignment | Substitution | Refresh | Print Version | Export

Subject	Sent On	Task ID
Approve travel request n° 0000050125 of COSTA CLAUDIA del 11.02.2016 al 11.02.2016	12.02.2016 12:05:46	TS90000003
Approve travel request n° 0000050106 of DI MASCOLO DANIELE del 09.02.2016 al 09.02.2016	12.02.2016 12:05:46	TS90000003
Approve travel request n° 0000050120 of DI MASCOLO DANIELE from 16.02.2016 to 16.02.2016	12.02.2016 11:56:33	TS900000020
Approve travel request n° 0000050120 of MARTINARO GIO' JANNI from 01.02.2016 to 01.02.2016	10.02.2016 17:58:16	TS900000020

Last Refresh: 12.02.2016 12:08:17 CET Refresh

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

▼ Hide Quick Criteria Maintenance

Show: * ▼

View: ▼ |

Subject
Approvare trasferta n° 0000050125 di COSTA CLAUDIA dal 11.02.2016 al 11.02.2016
Approvare trasferta n° 0000050108 di DI MASCOLO DANIELE dal 09.02.2016 al 09.02.2016
Approve travel request n° 0000050129 of DI MASCOLO DANIELE from 18.02.2016 to 18.02.2016
Approve travel request n° 0000050126 of MARINARO GIOVANNI from 01.02.2016 to 01.02.2016

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

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:

Workflow Tasks Work Items (4)

Workflow Tasks - Work Items

▼ Hide Quick Criteria Maintenance

Show: * New and In Progress Work Items

Apply Clear

View: [View standard] | Not Responsible Complete Resubmit End Resubmission Forward Assign To Me Cancel A

Subject	
Approvare trasferta n° 0000050125 di COSTA CLAUDIA dal 11.02.2016 al 11.02.2016	
Approvare trasferta n° 0000050108 di DI MASCOLO DANIELE dal 09.02.2016 al 09.02.2016	
Approve travel request n° 0000050129 of DI MASCOLO DANIELE from 18.02.2016 to 18.02.2016	
Approve travel request n° 0000050126 of MARINARO GIOVANNI from 01.02.2016 to 01.02.2016	

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:

▼ Hide Quick Criteria Maintenance

Show: * New and In Progress Work Items ▼

Apply Clear

View: [View standard] ▼ | Not Responsible Complete Resubmit End Resubmission Forward

Subject
Approvare trasferta n° 0000050125 di COSTA CLAUDIA dal 11.02.2016 al 11.02.2016
Approvare trasferta n° 0000050108 di DI MASCOLO DANIELE dal 09.02.2016 al 09.02.2016
Approve travel request n° 0000050129 of DI MASCOLO DANIELE from 18.02.2016 to 18.02.2016
Approve travel request n° 0000050126 of MARINARO GIOVANNI from 01.02.2016 to 01.02.2016

Approve travel request n° 0000050129 of DI MASCOLO DANIELE from 18.02.2016 to 18.02.2016 [X]

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

☒ Approve travel request
☐ Request sent back to the employee

OK Cancel

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.

Active Queries

Workflow Tasks Work Items (3)

Workflow Tasks - Work Items

Hide Quick Criteria Maintenance

Show: New and In Progress Work Items

Apply

Clear

View: [View standard]

Not Responsible

Complete

Resubmit

End Resubmission

Forward

Assign To Me

Cancel Assignment

Substitution

Refresh

Print Version

Export

Subject	Sent On	Task ID
Approvare trasferta n° 0000050125 di COSTA CLAUDIA dal 11.02.2016 al 11.02.2016	12.02.2016 12:05:46	TS90000003
Approvare trasferta n° 0000050128 di DIMASCOLO DANIELE dal 09.02.2016 al 09.02.2016	12.02.2016 12:05:45	TS90000003
Approve travel request n° 0000050128 of MARINARO GIOVANNI from 01.02.2016 to 01.02.2016	10.02.2016 17:58:16	TS900000020

Last Refresh 12.02.2016 12:40:57 CET

Refresh

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

Active Queries

Workflow Tasks **Work Items (0)**

Workflow Tasks - Work Items

Hide Quick Criteria Maintenance

Change Query Define New Query Personal

Show: * New and In Progress Work Items

Apply Clear

View: [View standard] | Not Responsible Complete Resubmit End Resubmission Forward Assign To Me Cancel Assignment | Substitution Refresh

Subject

Sent On Task

3

Last Refresh: 12.02.2016 12:41:36 CET Refresh