

Entering Job Code and Position for Salary Travel Data



Step	Action
1.	Navigate to the Salary Travel page.
	Note : This simulation is an example of a transaction. When entering a transaction in the live TeamWorks Financials system please select all values and options based on agency policy, the paperwork on hand and the current situation.
	Click the NavBar icon.





Step	Action
2.	Click the Navigator icon.
	Navigator



eamWorks	▼ Home		m =	= (
News and Announcements	Asset Management	NavBar: Navig	ator	
latest news			SRM Custom	>
		Navigator	News and Announcements	>
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		Recent Places	Employee Self-Service	>
	Arr 🗮 💼	My Favorites	Supplier Contracts	>
			Agency Security	>
Payables	Procurement		Customers	>
INVOIDE	<u> </u>		Products	>
			Customer Contracts	>
Projects	Receivables		Order Management	>
			Pricing Configuration	>

Step	Action
3.	Click the Vertical scrollbar.

TeamWorks	▼ Home	_	A ≡	۲
News and Announcements	Asset Management	NavBar: Navig	ator	
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	Asets Groot Larry	Navigator	Salary Travel Per Diem	>
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↓ ↓	/Jon	My Favorites	Financial Gateway	>
Payables	Procurement		Excise and Sales Tax/VAT IND	>
INVOICE	7		Commitment Control	>
			General Ledger	>
			Allocations	>
Projects	Receivables		Statutory Reports	>
			Set Up Financials/Supply Chain	``



Step	Action
4.	Click the Salary Travel Per Diem link.
	Salary Travel Per Diem



Step	Action
5.	Click the Maintain/Approve link.
	Maintain/Approve



TeamW	orks	▼ Home		⋒ ≡ Ø
	News and Announcements	Asset Management	NavBar: Nav	igator Ö
	latest news			Maintain/Approve
		Aset Locar tarr	Navigator	Salary Travel
			\odot	Approve Salary/PerDiem
	General Ledger	Grants	Recent Places	
			My Favorites	
	Payables	Procurement		
	Projects	Receivables		
		-8-3		

Step	Action
6.	Click the Salary Travel link.
	Salary Travel

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	New Window Help
alary Travel	
nter any information you have and click Search. Leave fields blank for a list of all values.	
Find an Existing Value	
Search Criteria	
Business Unit begins with 🗸 40500 🔍	
Fiscal Year = 2017 Q	
Empl ID begins with V	
Name begins with V	
Case Sensitive	



Step	Action
7.	Verify the Business Unit . If the correct business unit does not default enter or use the
	search functionality to select a new value.



Step	Action
8.	The current fiscal year defaults in the Fiscal Year field. Users can review information from a prior year by changing the year.



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Salary Travel	
Enter any information you have and click Search. Leave fields blank for a list of all values.	
Find an Existing Value	
▼Search Criteria	
Business Unit begins with V 40500 Q	
Fiscal Year = 2017 Q	
Empl ID begins with 🗸	
Name begins with V	
Case Sensitive	
Search Clear Basic Search 🛱 Save Search Criteria	

Step	Action
9.	Users can select the desired employee by Empl ID or Name . In this example, the user searches by Empl ID.
	Note: The Empl ID field can also be used to search by the Vendor EFI number.
	Click in the Empl ID field.
	Empl ID begins with V



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Salary Travel	
Enter any information you have and click Search. Leave fields blank for a list of all values.	
Find an Existing Value	
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Business Unit begins with V 40500	
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Search Clear Basic Search 📽 Save Search Criteria	

Step	Action
10.	Enter the appropriate information into the Empl ID field.
	For this example, type 86058605.

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	New Window Help 📰
Salary Travel	
Enter any information you have and click Search. Leave fields blank for a list of all values.	
Find an Existing Value	-
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Business Unit begins with 🗸 40500	
Fiscal Year = 💙 2017 🔍	
Empl ID begins with 🗸 86058605	
Name begins with 🗸	
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Search Clear Basic Search 🖉 Save Search Criteria	



Step	Action
11.	Click the Search button.
	Search

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alary Tra	vel				Ne	w Window Help Personalize Pag
B		tment of Public Health TOWER HOTEL	Fiscal Year:	2017		
Persona Trav	Position Title: Title Description Il Services: 0.00 el Verified: yee Status: Employed by other A	Travel:			~	
				Personalize	Find View All 💷 🔜	First 🕚 1-2 of 2 🕑 Last
Source	Personal Services	Travel	Employee Status	Travel Verified	Last Maintained By Operator ID	Last Change Date
FIN	0.00	1056.00	Other		LOAD	01/23/2018 4:46:56PM
ADJ	0.00	1056.00	Other		LOAD	01/23/2018 5:12:20PM
Save	Return to Search					

Step	Action
12.	Use the Salary Travel page to review and update an employee's travel expenses.



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Source	Personal Services	Travel	Employee Status	Travel Verified	Last Maintained By Operator ID	Last Change Date
IN	0.00		Other		LOAD	01/23/2018 4:46:56PM
DJ	0.00	1056.00	Other		LOAD	01/23/2018 5:12:20PM
Save	Return to Search					

Step	Action
13.	When there is a travel expense on an employee record without a salary, Job Code , and Position Title fields are open for entry.

< Hom	e							
Salary Tra	vel					Ne	ew Window Help Personalize	e Page
E	Business Unit: 40500 Depar	tment of Public Health	Fiscal Year: 20	17				
FEI/SSN/	Employee ID: 86058605	TOWER HOTEL						
	Position Title: Title Description			Code:	Q			
	Il Services: 0.00 el Verified:		105 Negative Amou Confirmed:	6.00 int	N/A •	~		
Employ	yee Status: Employed by other A	Agency 🗸	Add Updated	d Row				
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Source	Personal Services	Travel	Employee Status	Travel Verifie	ed ID	t Maintained By Operato	Last Change Date	
FIN	0.00				LO		01/23/2018 4:46:56PM	
ADJ	0.00	1056.00	Other		LO	AD	01/23/2018 5:12:20PM	
📆 Save	Return to Search							
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Step	Action					
14.	Users must enter or use the look up functionality to select the correct Job Code .					
	Note: The system will not accept 99999 or 00000 values.					
	Click the Job Code button.					
	Job Code:					

< Home	
	Look Up Job Code New Window Help Personalize Page
Salary Travel	Help
Salary Havel	Job Code begins with V
Duringer Heite (area) Dealer I (D. 1	
Business Unit: 40500 Department of Public	Jobcode Description begins with V
FEI/SSN/Employee ID: 86058605 TOWER H	Look Up Clear Cancel Basic Lookup
Position Title: Title Description not Provided	Search Results
Personal Services: 0.00	Only the first 300 results can be displayed.
Travel Verified:	View 100 First 1 1-300 or 300 D Last
	Job Code Jobcode Description
Employee Status: Employed by other Agency V	02110 Executive Secretary (PSC)
Employee status. Employee by other Agency	
	06010 Communications Officer Chief
Source Personal Services Travel	06011 Director, Human Resources By Operator Last Change Date
FIN 0.00	06012 Human Resources Director TRS 01/23/2018 4:46:56PM
ADJ 0.00	06017 HR Consultant 3 (GTA) 06018 Deputy Director 01/23/2018 5:12:20PM
	06019 Director
	06020 Communications Director
	06021 Chief of Staff
	07419 Security Officer (TCSG)
Return to Search	07425 Security Chief, DTAE
	07426 Assistant Campus PoliceChief
	07427 Campus Police Officer
	07428 Campus Police Chief
	07429 Campus Police Sergeant
	08000 Communication & Outreach Spec
	08001 Communication & Outreach Coord
	08002 Data Processor
	08003 Data Analyst
	08004 Informational Analyst
	08005 Intake Supervisor
	08006 Technical Services Mgr (CSCJ)
	09414 Manager
	10000 Apprenticeship Specialist
	10003 Education Principal
<	>

Step	Action
15.	Click the 08003 - Data Analyst link.



I/SSN/	Employee ID: 86058605	TOWER HOTEL				
	Position Title: TITLE DESCRIP	TION NOT PROVIDED	Job	Code: 08003 🔍		
ersona	I Services: 0.00	Travel:	10	56.00		
Trav	el Verified:		Negative Amo	unt N/A	\sim	
			Confirmed: Add Update	d Row		
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ource	Personal Services	Travel	Employee Status	Travel Verified	Last Maintained By Operator ID	Last Change Date
IN	0.00	1056.00	Other		LOAD	01/23/2018 4:46:56PM
115						
	0.00	1056.00	Other		LOAD	01/23/2018 5:12:20PM
ADJ Save	0.00	1056.00	Other		LOAD	01/23/2018 5:12:20PM

Step	Action
16.	Notice that the system defaults the associated Position Title.

< Home	•					^ ≡	۲
Salary Tra	vel				Ne	w Window Help Personalize Page	
в		tment of Public Health F	Fiscal Year: 20	17			
	Position Title: TITLE DESCRIP	TION NOT PROVIDED	Job	Code: 08003 Q			
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Source	Personal Services	Travel	Employee Status	Travel Verified	Last Maintained By Operator ID	Last Change Date	
FIN	0.00	1056.00	Other		LOAD	01/23/2018 4:46:56PM	
ADJ	0.00	1056.00	Other		LOAD	01/23/2018 5:12:20PM	
Save _	Return to Search						
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Step	Action
17.	Click the Travel Verified option.
	Travel Verified:

			iscal Year:	2017		
EI/SSN/	Employee ID: 86058605	TOWER HOTEL				
	Position Title: TITLE DESCRIPT			ob Code: 08003 🔍		
	I Services: 0.00 el Verified: 🗹		Negative Ame	056.00 ount N/A	\sim	
			Confirmed: Add Updat	ted Row		
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Source	Personal Services	Travel	Employee Status	Travel Verified	Last Maintained By Operator	
FIN	0.00	1056.00			LOAD	01/23/2018 4:46:56PM
ADJ	0.00	1056.00	Other		LOAD	01/23/2018 5:12:20PM
Save	Return to Search					
	Return to Search					

Step	Action
18.	Click the Save button.
	R Save



	Employee ID: 86058605	TOWER HOTEL				
	Position Title: TITLE DESCRIPT	TION NOT PROVIDED	J	ob Code: 08003	2	
	al Services: 0.00			056.00	~	
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Source	Personal Services	Travel	Employee Status	Travel Verified	Last Maintained By Operator	Last Change Date
IN	0.00				LOAD	01/23/2018 4:46:56PM
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		1056.00	Other		LUAD	011232018 0.1220PM
		1056.00	Other		LUAD	011232018 0.1220PM

Step	Action
19.	Click here (<u>https://www.surveymonkey.com/r/25KG2HH</u>) to take a quick survey.

Stary Travel Business Unit: 4000 Department of Public Health Fiscal Year: 2017 FUSSINEEmployee ID: 80058005 TOWER HOTEI Postion Title: ITTEE DESCRIPTION NOT PROVIDED Job Code: 08003 C Personal Services: 0.00 Travel: Mad Travel Verified:	🔇 Hom	e					A =	Ø
Business Unit: 40500 Department of Public Health Fiscal Year: 2017 FE/JSSN/Employee ID: 86058605 TOWER HOTEL Position Title: Title DESCRIPTION NOT PROVIDED Job Code: 08003 Personal Services: 0.00 Travel: 1056.00 Travel Verified: Magative Amount N/A Confirmed: Confirmed: Source Personal Services 1.2 of 2 • Last Source Personal Services Travel Employee Status: FIN 0.00 1056.00 Other LoAD 01/23/2018 5:12:20PM	Salary Tra	avel				Ne	w Window Help Personalize	Page 🛛 📰 🚽
Personal Services: 0.00 Travel: 1056.00 Negative Amount Confirmed: Add Updated Row Employee Status: Employed by other Agency Md Updated Row Source Personal Services Travel Employee Status: Find View All [2]] First ④ 1.2 of 2 ● Last Source Personal Services Travel Employee Status: Travel Verified Last Maintained By Operator Last Maintained By Operator Last Change Date FIN 0.00 1056.00 Other LOAD 01/23/2018 5:12:20PM	E	Business Unit: 40500 Depar		iscal Year: 20	17			
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Employee status. Travel Find (View All (2)) First 1.2 of 2 Last Source Personal Services Travel Employee Status Travel Verified Lost Last Maintained By Operator ID Last Change Date FIN 0.00 1056.00 Other LOAD 01/23/2018 4:46:56PM ADJ 0.00 1056.00 Other LOAD 01/23/2018 5:12:20PM	Trav	el Verified: 🗹		Negative Amou Confirmed:	nt N/A	\sim		
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	FIN	0.00	1056.00					
Return to Search	ADJ	0.00	1056.00	Other		LOAD	01/23/2018 5:12:20PM	
	R Save	Return to Search						



Step	Action
20.	Congratulations! You have completed entering and verifying Job Code information for Salary and Travel. End of Procedure.