

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



TeamWorks		▼ Home		⋒ ≡	۲
	News and Announcements	Asset Management	NavBar: Nav	igator	0
	latest news	Fixed (Last)	E	SRM Custom	> ^
			Navigator	News and Announcements	>
	General Ledger	Grante	Ø	SAO Technical	>
			Recent Places	Employee Self-Service	>
				Supplier Contracts	>
				Agency Security	>
	Payables	Procurement		Customers	>
	INVOICE			Products	>
				Customer Contracts	>
	Projects	Receivables		Order Management	>
				Pricing Configuration	>
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Step	Action
3.	Click the Vertical scrollbar.

TeamWorks		▼ Home		⋒ ≡	۲
	News and Announcements	Asset Management	NavBar: Navig	ator	•
	latest news			Custom Accounts Payable	> ^
		Asset	Navigator	Salary Travel Per Diem	>
				Asset Management	>
	General Ledger	Grants	Recent Places	IT Asset Management	>
			*	Banking	>
	<u> </u>		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



TeamWorks		▼ Home	⋒ ≡ Ø		
	News and Announcements	Asset Management	NavBar: Navi	gator Ö	
	latest news			Maintain/Approve	
		Aset Locar tarm	Navigator	Salary Travel	
			Ø	Approve Salary/PerDiem	
	General Ledger	Grants	Recent Places		
			My Favorites		
	Payables	Procurement			
	Projects	Receivables			
	E				

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 🗸	
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	
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Fiscal Year = 2017 Q	
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Case Sensitive	
Search Clear Basic Search <table-cell></table-cell>	

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



< Home	∧ ≡ Ø
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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	
Fiscal Year = 2017 Q	
Empl ID begins with V	
Search Clear Basic Search 📽 Save Search Criteria	

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

K Home	∧ ≡ Ø
	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 Q	
Empl ID begins with 🗸 86058605	
Name begins with 🗸	
Case Sensitive	
Search Clear Basic Search 🖉 Save Search Criteria	



Step	Action
11.	Click the Search button.
	Search

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alary Tra	wel				Ne	w Window Help Personalize Pag
E FEI/SSN/	Business Unit: 40500 Depar Employee ID: 86058605	tment of Public Health TOWER HOTEL	Fiscal Year:	2017		
Persona Trav Employ	Position Title: Title Description al Services: 0.00 vel Verified: yee Status: Employed by other A	not Provided Travel:	Ju 1 Negative Am Confirmed: Add Upda	ob Code: Q 1056.00 rount N/A	~	
				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.



Persona Trav Employ	Position Title: Title Description al Services: 0.00 rel Verified: yee Status: Employed by other A	not Provided Travel:	Joi 10 Negative Amo Confirmed: Add Update	b Code: Q 156.00 N/A ed Row		
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source	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
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.

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Salary Tra	wel					N	ew Window Help Personalize	e Page
E	Business Unit: 40500 Depar	tment of Public Health	Fiscal Year: 20	117				
FEI/SSN/	Employee ID: 86058605	TOWER HOTEL						
	Position Title: Title Description	not Provided	Job	Code:	Q			
Persona Trav	el Verified: 0.00	Travel:	105 Negative Amou Confirmed:	i6.00 int	N/A	~		
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Source	Personal Services	Travel	Employee Status	Travel Verifi	ed La:	st Maintained By Operato	Last Change Date	
FIN	0.00	1056.00	Other		LO	AD	01/23/2018 4:46:56PM	
ADJ	0.00	1056.00	Other		LO	AD	01/23/2018 5:12:20PM	
📊 Save	Return to Search							
/								



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:					

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	Look Up Job Code
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Salary Haver	Job Code benins with V
Business Unit: 40500 Department of Public	
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 Einter an earne All ant
	View rob i nat - Pool (1300 - LdSt
Employee Status: Employed by other Agency	Job Code JobCode Description
Employee status. Employee by other Agency V	06000 Human Desources Director
	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	06018 Deputy Director 01/23/2018 5:12:20PM
	06019 Director
	06020 Communications Director
	06021 Chief of Staff
	07419 Security Officer (TCSG)
Save Or 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
	USUU2 Data Processor
	USUU3 Data Analyst
	00005 Inteles Supervises
	00005 Intake Supervisor
	0000 recimical devices myr (0300)
	10000 Apprenticechin Specialist
	10003 Education Principal
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Step	Action
15.	Click the 08003 - Data Analyst link.
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	Position Title: TITLE DESCRIP	TION NOT PROVIDED	Jot	o Code: 08003 🔍		
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ource	Personal Services	Iravel	Status	I ravel Verified	ID	Last Change Date
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DJ	0.00	1056.00	Other		LOAD	01/23/2018 5:12:20PM
ADJ Bave	0.00	1056.00	Other		LOAD	01/23/2018 5:12:20PM
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ADJ Save	0.00	1056.00	Other		LOAD	01/23/2018 5:12:20PM
ADJ Bave	0.00	1056.00	Other		LOAD	01/23/2018 5:12:20PM
DJ	0.00	1056.00	Other		LOAD	01/23/2018 5:12:20PM

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

K Home	•					^ ≡	٢
Salary Tra	vel				Ne	w Window Help Personalize Page	
B FEI/SSN/I	usiness Unit: 40500 Depar Employee ID: 86058605	tment of Public Health F	Fiscal Year: 20	17			
	Position Title: TITLE DESCRIP	TION NOT PROVIDED	Job	Code: 08003 Q			
Persona Trave Employ	I Services: 0.00 el Verified: ree Status: Employed by other A	gency V	105 Negative Amou Confirmed: Add Updated	6.00 int N/A	V		
				Personalize F	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	
R Save	Return to Search						
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Step	Action
17.	Click the Travel Verified option.
	Travel Verified:

E	Business Unit: 40500 Depart	ment of Public Health	iscal Year:	2017		
EI/SSN/	Employee ID: 86058605	TOWER HOTEL				
	Position Title: TITLE DESCRIPT	TION NOT PROVIDED	Jo	ob Code: 08003 🔍		
ersona ^o Trav	el Verified: 🗹	Travel:	Negative Ame	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	Last Change Date
FIN	0.00	1056.00	Other		LOAD	01/23/2018 4:46:56PM
AD.I	0.00	1056.00	Other		LOAD	01/23/2018 5:12:20PM
Save	Return to Search					
Save	Return to Search					

Step	Action
18.	Click the Save button.
	Save Save



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	Position Title: TITLE DESCRIPT	TION NOT PROVIDED	Jot	o Code: 08003 🔍		
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Source	Personal Services	Travel	Employee Status	Travel Verified	Last Maintained By Operator	Last Change Date
IN	0.00	1056.00	Other		LOAD	01/23/2018 4:46:56PM
	0.00	1056.00	Other		LOAD	01/23/2018 5:12:20PM
DJ	5.05					
ADJ Save	Return to Search					

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

K Home	9				Net	w Window Help Personalize Pag	
Salary Tra	vel		Secol Vermion	17			
FEI/SSN/	Employee ID: 86058605	TOWER HOTEL	-iscal Year: 20	17			
	Position Title: TITLE DESCRIP	TION NOT PROVIDED	Job	Code: 08003 Q			
Persona Trave	I Services: 0.00 el Verified: 🗹	Travel:	105 Negative Amou Confirmed: Add Updated	6.00 nt N/A	~		
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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
20.	Congratulations! You have completed entering and verifying Job Code information for Salary and Travel. End of Procedure.