

Approving Business Trip Requests

SAP Fiori Travel Management



Contact



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Instructions for Approving Business Trips

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Business trips: requests and notifications

Requesting a business trip or amending a request

Via "My Business Trip Requests/Notifications" in Travel Management
Performed by Traveler/Assistant

For corrections, a new approval process is required

Approve request: Trip is necessary for professional and business purposes

Task in "My Inbox"
By Supervisors
Rejection returns the request to the applicant for correction

Approve request: Review and approve the budget for the requested trip

• Task in "My Inbox"

- Performed by the resource managers
- Rejection returns the request to the applicant for correction

Review and process any advance payment

- Only if an advance payment is requested
- The Travel Management Team receives a task, reviews, and disburses the advance payment

Payment

Travel expense report is automatically approved
Settlement run is executed and payment is made

Manage travel expenses

• The Travel Management Team receives the task and, if necessary, asks follow-up questions

Submit travel expenses

After the trip Performed by Traveler/Assistant





Approving a business trip—navigating to Travel Management



Click "Inbox" in the notification email or Use your browser by logging in with your uni username (B-Kennung)



View explained: Homepage





View explained: My Inbox



View explained: My Inbox—e.g., attachment details





View explained: My Inbox





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Approving a business trip—**Open Task**



- 1. Select the business trip request from the task list on the left.
- 2. Click "Open task."
- 3. The "Approve travel request" screen opens in a new window



View explained: Approve travel request

Approve travel request 00410	00135						
Trip header data Workleen: 000007605769 Personnel Number: 0000404 Trip number: 0041000135 [2: Print form [2: Print form			Display as PD	F			
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category			Total Cost		100.00 EUR		
participant/conference fee					200.00 EUR		
overnight accommodation					300,00 EUR		
daily allowance					0.00		
other expenses					0,00		
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				re	equested trip		
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Der Forschung | Der Lehre | Der Bildung

Approving a business trip—Approval

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Workitem:	000007605769						
Personnel Number:	40000404						
Trip number:	0041000135						
	G Print form						
Account Assignm	nent						
Company Code	CO Area description	CO Area	Cost Center	Cost Center description	WBS Element	WBS Element description	percentage
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- 1. Review the information and click on "The business trip is necessary for professional and business reasons and will be approved."
- 2. The "Confirm decision" screen opens, where you can enter a comment on the approval. Click "Confirm."

Confirm decision
You can leave a note for your decision here.
A confirmation is displayed
and you can close the window.

3.

Approving a business trip—Rejection

Irip header data							
ing nearer auto							
Workitem:	000007605769						
Personnel Number:	40000404						
Trip number:	0041000135						
	G Print form						
Account Assignm	nent						
Company Code	CO Area description	CO Area	Cost Center	Cost Center description	WBS Element	WBS Element description	percentage
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Category costs of travel/flight participant/conference fee	2			Total Cos	t	Currency 100,00 EUR 200,00 EUR	
Category costs of travel/flight participant/conference fee overnight accommodation	2			Total Cos	t	Currency 100.00 EUR 200.00 EUR 300.00 EUR	
Category costs of travel/flight participant/conference fee overnight accommodation daily allowance	2			Total Co:	t	Currency 100,00 EUR 200,00 EUR 300,00 EUR 0,00	
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- 1. Review the information and click "Reject travel request."
- 2. The "Confirm decision" screen opens, where you can enter a comment on the rejection. Click "Confirm."

Confirm decision	
You can leave a note for your d	ecision here.
* Comment:	
A confirma and you ca window. T receives a	ition is displayed n close the he applicant notification.

3.



Approving a travel budget—Open Task



- Select the business trip from the task list on the left.
- 2. Click "Open task."
- 3. The "Check funding" screen opens in a new window.



View explained: check funding

Try head data Display as PDF Display the cost center / WBS element proposed by the applicant or the allocation across multiple funding sources Account Assignment Concerting	Check funding fo	r trip 00410	00239							
Account Assignment Contrary Code Cod Aces description Code Code Code description Code Code Code description Code Code Code description Code Code Code Code Code Code Code Code	Trip header data Workitem: 0000 Personnel Number: 4000 Trip number: 004U	07617679 0403 000239	Display	as PDF		Displays the cos	t center / WBS ele across m	ment propose nultiple fundin	ed by the applicant or the allocation ng sources	
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Approving a travel budget—Approval

Trip header data								
Workitem: 0000	07617679							
Personnel Number: 4000	0403							
Trip number 0041	000239							
C Pr	rint form							
Account Assignment	t							
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- 1. Review the information and click on "Approve funds."
- 2. The "Confirm decision" screen opens, where you can enter a comment on the approval. Click "Confirm."

Confirm decision	
You can leave a note for your decision	here.
Comment	
Confirm Cancel	ion is displayed

and you can close the window.

3.

Approving a travel budget—Rejection

Trip header data	a									
Workitem	00000761767	9								
Personnel Number	r: 40000403									
Trip number	r: 0041000239									
	Print form									
Account Assign	ment									
Company Code		CO Area	CO Area description	Cost Center	Cost Center descr	ption	WBS Element	WBS Element of	description	percentage
3420		3420	Universität	600000						1
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Advances										
The total advance i	is 800,00 EU	R.								
Advances cannot be deleted	d. To reduce the adv	ance amount, pl	ease create an advance with a negative am	ount.						
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Amount					Currency 800,00 EUR					
Amount					Currency 800,00 EUR					
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Amount Estimated costs The total amount o Category costs of travel/tight participant/conference f overright accommodati daily allowance other expenses Approve funds Reject T	5 of estimated of fee	osts is 1.00	10,00 EUR.		Currency 800.00 EUR	Total Cost		1.000,00 0.00 0.00 0.00 0.00	Currency EUR	
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- 1. Review the information and click on "Reject request."
- 2. The "Confirm decision" screen opens, where you can enter a comment on the approval. Click "Confirm."

Confirm decision	
You can leave a note for your decision here.	
* Comment:	
A confirmation is displaye	d
and you can close the win	d

3.

and you can close the window. The applicant receives a notification.



Approving a travel budget — Account assignment changes

rip neader data	L	
Workitem:	000007620026	
Personnel Number:	40000404	
Trip number:	0041000135	
	2- Print form	
ccount Assignn	nent CO Area	CO Area description

- Select the account assignment to be changed using the option field, then click "Edit." The "Edit" button becomes available after selecting an option.
- 2. Alternatively, a new funding source can be added by clicking the "Create" button.
- 3. The "Account Assignment" screen opens.

View explained: Account Assignment

Account Assignme	nt			Switc	n between a	ccounts to view de	tails	
Company Code	CO Area	CO Area description	Cost Center	Cost Center description	WBS Eleme	ent WBS Element de	escription	percentage
3420	3420	Universität	600000					50,00
3420	3420	Universität	100010		_			50,00
🖸 Create 🖉 Edit 🗿 Delef	te 🗑 Save			Input fields for cost	center or WB	S element		
Company Code: 3420		UNI Hamburg						
CO Area: 3420		Universität			Opens se	earch function		
Cost Center: 10001	0 0							
WBS Element:		8			St	elect: Cost Center	Z ×	
Percent Cost Assign: 50	0.00					Hide Advanced Search Result <	= 500 items Go	
				Controlling A	ea:	Cost Center:	C	
V Apply X Cancel				Valid Fr	ne: DD.MM.YYYY	Valid To: DD.MM.YYYY	10	
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				C0 ≜ Cos	Center Valid From Valid To	Name Long Text		
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	-							
							Cancel	
Confirms the inv	ut and ret	une to the "Charle						
Contirm the inp	out and ret	um to the Check						
fu	inding" scr	reen						

Approving a travel budget—**Account assignment changes**

Trip header data								
Workitem:	000007620026							
Personnel Number:	40000404							
Trip number:	0041000135							
	2 Print form							
Account Assignm	ient							
Company Code	CO An	CO Area description	Cost Center	Cost Center description	WBS Element	WBS Element description	percer	ntage
3420	342	Universität	600000					50,0
 3420 	3420	Universität	100010					50.0
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- 4. After changing the account assignment in the "Account Assignment" screen and clicking "Apply," confirm the changes by clicking "Save" in the "Check funding" window.
- 5. The budget approval process can now be completed as described above.

