



# FRONTLINE PROCEDURES

Pasadena ISD

## ENTRY POINT:

- Travel Request Search
- Expense Report Search
- My Check Request Search
- Mileage Reimbursement Request Search

DATE DEVELOPED: 07/15/2021

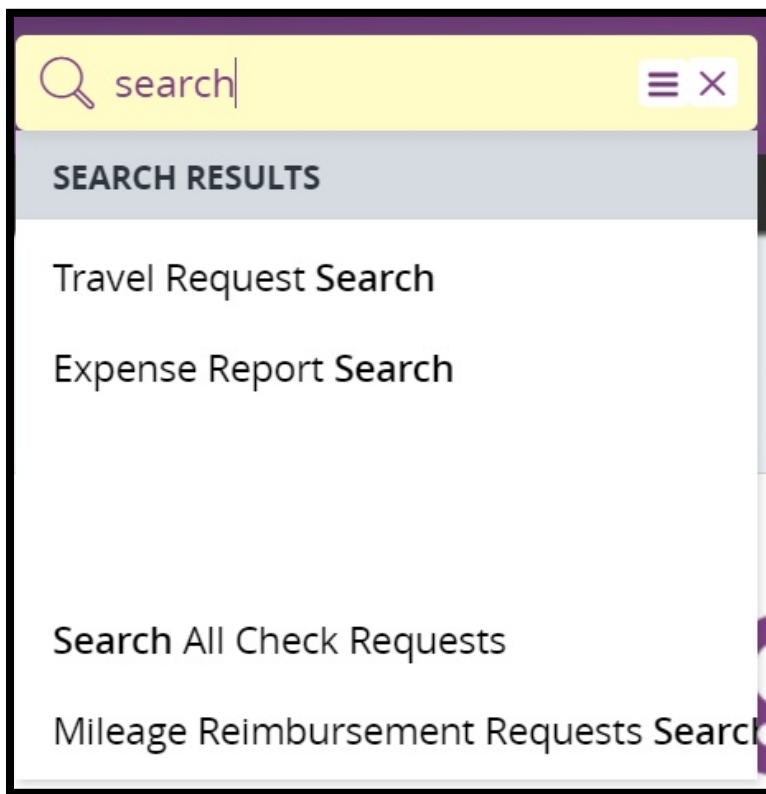
REVISED DATE:

**SUBJECT: Search Travel, Expense, Check Request and Mileage Reimbursement**

## Search Request Instructions

Enter **Search** in the Search field. Located upper right corner on the Purple ribbon. The drop down will populate the search results.

Travel Request, Expense Report, Check Request and Mileage Reimbursement





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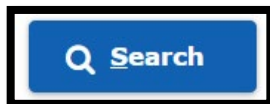
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## Travel Request Search Entry Point

- Enter **Traveler** or use the icon to search for the person traveling.
- Once parameters fields are entered, click **SEARCH**



Traveler	Request ID	Activity/Purpose	Event Number	Travel Request Status	Expense Report Status	Created Date	Departure Date	Return Date	State
Kourtnie McBride (114556)	0	TASBO		Approval in Progress	Not Started	08-05-2021 1:47 PM	08-08-2021 10:00 AM	08-11-2021 6:00 PM	TX
Kourtnie McBride (114556)	10	dfdfsh		Void	Not Started	08-10-2021 2:47 PM	08-10-2021 3:00 PM	08-12-2021 5:00 PM	TX
Kourtnie McBride (114556)	6	TASBO 2021		Entered	Not Started	08-09-2021 5:23 PM	06-13-2021 10:00 AM	06-16-2021 5:00 PM	TX
Kourtnie McBride (114556)	7	TASBO		Entered	Not Started	08-10-2021 11:54 AM	06-13-2021 10:00 AM	06-16-2021 5:00 PM	TX
Kourtnie McBride (114556)	8	TASBO		Approval in Progress	Not Started	08-10-2021 12:23 PM	06-13-2021 10:00 AM	06-16-2021 5:00 PM	TX
Kourtnie McBride (114556)	9	etwetwe		Entered	Not Started	08-10-2021 1:30 PM	06-13-2021 10:00 AM	06-16-2021 5:00 PM	TX

- Once the Travel Request Search results come up you can **View** a Travel Request, **Void** a Travel Request, and **Send an Expense Report Reminder**.



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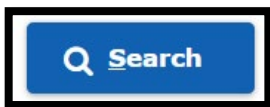
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## Expense Report Search Entry Point

The form is titled "Expense Report Search" and contains the following fields:

- Traveler:** A text input field with a yellow highlight and a search icon.
- Request ID:** A text input field.
- Event:** A dropdown menu.
- Event Number:** A dropdown menu.
- Activity/Purpose:** A text input field.
- Status:** A dropdown menu.
- Expense Report Create Date:** A date input field with a calendar icon, split into **Minimum** (09-01-2020) and **Maximum** (08-10-2021) sections.
- Departure Date:** A date input field with a calendar icon.
- Return Date:** A date input field with a calendar icon.
- Destination State:** A dropdown menu.
- City:** A dropdown menu.

- Enter **Traveler** or use the icon to search for the person traveling.
- Once parameters fields are entered, click **SEARCH**



The results page is titled "Expense Report Search Results" and shows:

- A header bar with "Expense Reports" and "0 Records".
- A filter bar with dropdown menus for: Traveler, Request ID, Activity/Purpose, Event, Event Number, Status, Created Date, Departure Date, Return Date, State, City, and Next In Workflow.
- A "View" button with a hand icon.
- A "Return to Search" button with a back arrow icon.

- Here you can **View** Expense Reports that are in the system.



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## My Check Request Search Entry Point

Check Request Search

Selected Position: 7042      Role Name: Specialist - Business and Finance (Support)

Check Request Search    Results

Fiscal Year:       Check Request Number:

Vendor:       Status:

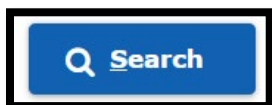
Description:        Contains     Exact

Requestor:

Account Number:      Fund    Func    Obj    SubObj    Org    PIC    Local

-  -  -  -  -  -

- Access the My Check Request entry point to view the Check Request Search tab.
- **Fiscal Year**- use the drop-down menu to select, school year
- **Vendor** – to narrow the search enter or use the icon to search for the vendor
- Once parameters fields are entered, click **SEARCH**





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On the Check Request Search Results tab, you can click a Check Request to select it, and then:

Check Request Search Results

Selected Position: 7042      Role Name: Specialist - Business and Finance (Support)

Check Request Search    **Results**

Check Request Search Results      3 Records

	Requisitioner	Requestor	ID	Needed	Justification	Check	Line	Line Item	Line	Year	Line Item	Line Item
			By			Request Total Amount	Item Amount	Desc.	Item Invoice Number		Account Number	Statu
+ :	McBride, Kourtnie Kaye	McBride, Kourtnie Kaye	35	08-06-2021	Lunch for staff	430.00	390.0	Pkg Box Lunch & Utensils	1456876	2021	199-41-6499-000-730-99-000000	Appro
+ :	McBride, Kourtnie Kaye	McBride, Kourtnie Kaye	35	08-06-2021	Lunch for staff	430.00	40.0	Drinks	1467568	2021	199-41-6499-000-730-99-000000	Appro
+ :	McBride, Kourtnie Kaye	McBride, Kourtnie Kaye	32	08-11-2021	Lunch for staff	340.00	340.0	Box Lunch	123456	2021	199-41-6499-000-730-99-000000	Appro

View   Clone   Hold   Unhold   Notes   Cancel Line Item

Click **VIEW** – to see the details of the Check Request

Click **CLONE** – to duplicate the Check Request and make changes

Click **HOLD** – to put the Check Request on hold

Click **UNHOLD** – to release a Check Request from Hold

Click **NOTES** – to add Notes to a Check Request

Click **CANCEL LINE ITEM** - to cancel the entire Check Request



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## Mileage Reimbursement Request Search Entry Point

### Search Mileage Reimbursement Requests

Requestor:  

Year:

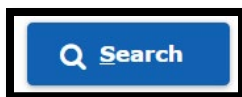
Month:

Status:

Fund    Func    Obj    SubObj    Org    PIC    Local

-  -  -  -  -  -

- **Requestor** – type in the person name or use the icon to search
- **Year**- to narrow the search results use the drop-down menu to select a year
- Once parameters fields are entered, click **SEARCH**



This screen will show you the Requestor, Year, Month and Number of Request an employee has in the system. You are able to view each request

### Mileage Reimbursement Requests

Requestor	Year	Month	Number of Requests
Kourtnie McBride	2021	August	3
Kourtnie McBride	2021	July	2
Kourtnie McBride	2021	June	2

3 Records