



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create Travel
Request

DATE DEVELOPED: 07/15/2021 REVISED DATE: 10/28/2021

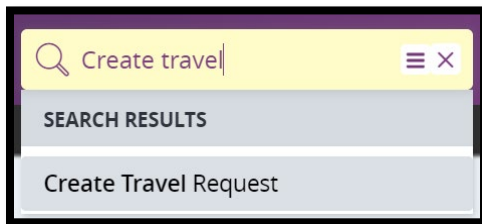
SUBJECT: Travel Request

Create Travel Request

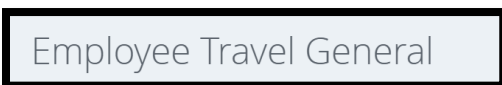
THE PURPOSE OF A TRAVEL REQUEST IS TO ENCUMBER ANTICIPATED TRAVEL EXPENSES THAT COULD BE INCURRED. INDIVIDUALS CAN PLACE A REQUEST FOR THEMSELVES OR SOMEONE ELSE.

[Login in option 1: Secretary and Bookkeepers – follow this log in](#)

Enter **Create Travel Request** in the Search field. Located upper right corner on the purple ribbon.

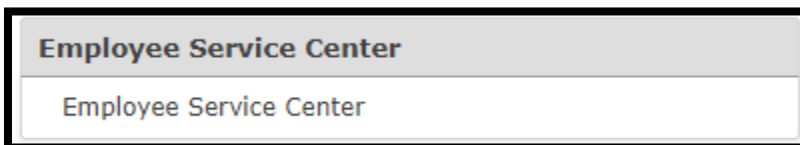


This pulls up the screen **Employee Travel General**



[Login in option 2: Everyone else](#)

- Log into Frontline
- Employee Service Center – on the Dashboard





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SUBJECT: Travel Request

Employee Service Center Log in – enter credentials

esc.signon.notes

User ID

Password

Sign On

[Forgot Password](#) | [Forgot User ID](#)

Need an Account? [Register](#)

- Select to receive Voice or SMS/Text Identity confirmation

frontline education™

Welcome to the Pasadena ISD Employee Service Center

How would you like to confirm your identity?

(281) - - Voice

(281) - - SMS/Text

Next

Cancel



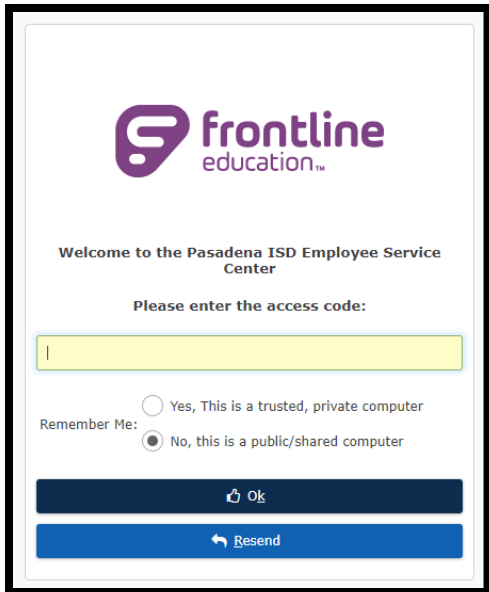
FRONTLINE PROCEDURES

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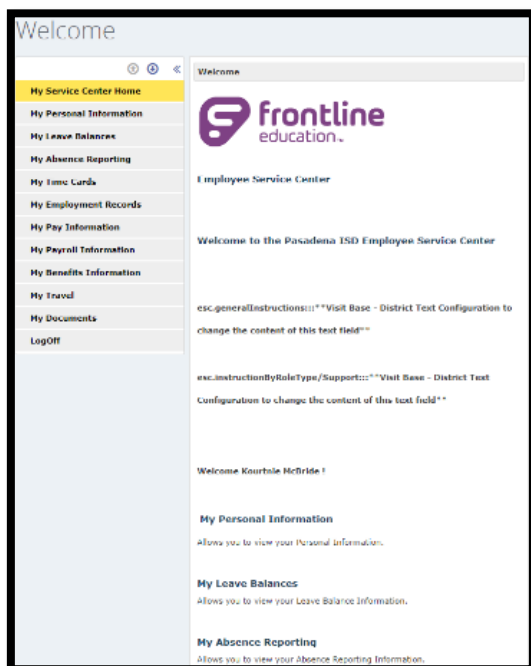
DATE DEVELOPED: 07/15/2021 REVISED DATE: 10/28/2021

SUBJECT: Travel Request



- Enter **Access Code**
- Select - **No, this is a public/shared computer**
- Click, **OKAY**

Frontline Dashboard comes up





FRONTLINE PROCEDURES

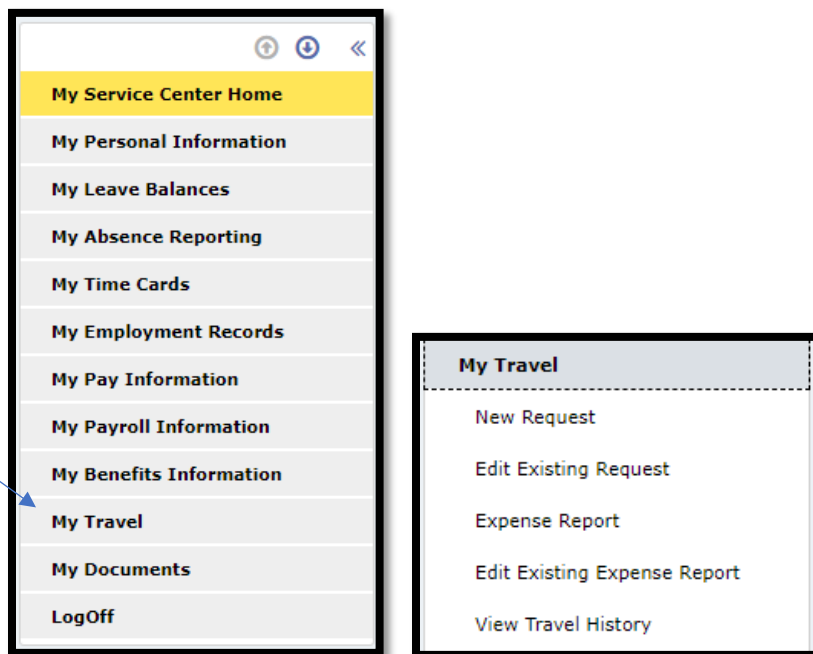
Pasadena ISD

ENTRY POINT:
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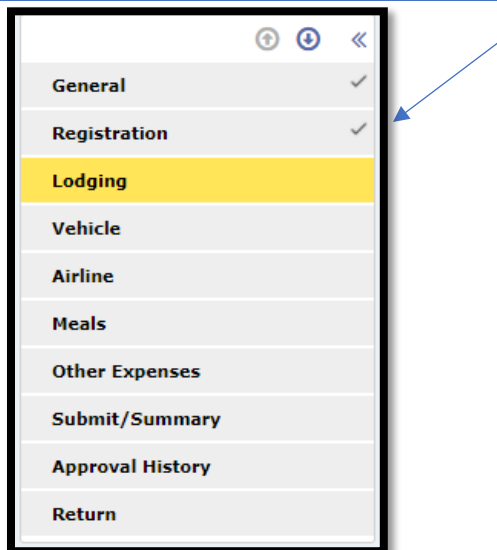
DATE DEVELOPED: 07/15/2021 REVISED DATE: 10/28/2021

SUBJECT: Travel Request

Select the **"MY TRAVEL"** tab located on the left hand side of the Dashboard
Here you can see the different options – to create a travel request click, **"NEW REQUEST"**



AS YOU COMPLETE THE TRAVEL CATEGORIES YOU WILL SEE CHECK MARKS NEXT TO THE TABS, WHICH MEANS THE MODULE HAS BEEN COMPLETED.





FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create Travel Request

DATE DEVELOPED: 07/15/2021 REVISED DATE: 10/28/2021

SUBJECT: Travel Request

GENERAL CATEGORY DESCRIPTION OF FIELDS TO COMPLETE

Traveler: Enter the name or ID number of the individual that will be traveling

Event: currently not used leave blank

Event Number: currently not used leave blank

Activity/Purpose: Name of event

Destination - State/City: Enter State and City where event will take place

Departure - Date/Time: Enter the date and time when leaving for this travel

Return - Date/Time: Enter the date and time when returning from travel

Will an advance of expenses be expected: ENTER "No". Employees will not be approved for Travel Advances. Student related travel advances can be requested. Federal funds will not be issued a travel advance.

Account Type:

Employee – individual traveling is a district employee

Non-Employee – Individual traveling is not a district employee/student, (i.e. chaperone)

Student/employee – Individuals traveling are student and district employee

Student – Individual traveling is district student

General Ledger Account: Enter the budget that will be used to expense the purchase. The "General Ledger Account" can be provided by the secretary/bookkeeper.

Once you enter the General Ledger Account, click **Save Request**

The screenshot shows a web form titled "General" for creating a travel request. The fields are as follows:

- Traveler:** A text input field with a yellow highlight and a grid icon.
- Event:** A dropdown menu.
- Event Number:** A dropdown menu.
- Activity/Purpose:** A text input field with a character count: "Characters remaining: 1028 (1028 max)".
- Destination:** "State" is a dropdown menu set to "Texas"; "City" is a text input field.
- Departure:** "Date" and "Time" are input fields. "Time" has radio buttons for AM and PM.
- Return:** "Date" and "Time" are input fields. "Time" has radio buttons for AM and PM.
- Will an advance of expenses be expected:** Radio buttons for "Yes" and "No", with "No" selected.
- Account Type:** A dropdown menu set to "Employee".
- Budget Table:** A table with columns: Fund, Func, Obj, SubObj, Org, PIC, Local, Year, Owner Prct, and Available Budget Balance. The "Owner Prct" column has a value of "100" and "100%". The "Available Budget Balance" column has a value of "\$0.00". There are search and trash icons next to the "Available Budget Balance" field.

At the bottom of the form, there is a blue button labeled "Add Account Type" and another blue button labeled "Save Request".

Once saved you will see the Travel Request will be at the bottom of the General Page with a Request ID Number. Click Continue – to move to the next tab.

The screenshot shows a table titled "Travel Requests" with the following data:

Request ID	Event	City	Travel Request Status	Expense Report Status	Next in Workflow	State	Departure Date	Return Date	Reimbursement Expected	Traveler
75	TASA Conference AUSTIN	AUSTIN	Entered	Not Started		TX	11-15-2021	11-17-2021	N	Franklin Moses

Below the table are buttons for "Edit", "Delete", "Attachments", and "View Approval History". At the bottom center, there is a blue button labeled "Continue".



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ENTRY POINT:
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DATE DEVELOPED: 07/15/2021 REVISED DATE: 10/28/2021

SUBJECT: Travel Request

REGISTRATION CATEGORY DESCRIPTION OF FIELDS TO COMPLETE

Advance Required: ENTER "No". Employees will not be approved for Travel Advances. Student related travel advances can be requested. Federal funds will not be issued a travel advance.

Expense For:

Employee – individual traveling is a district employee

Non-Employee – Individual traveling is not a district employee/student, (i.e. chaperone)

Student/employee – Individuals traveling are student and district employee

Student – Individual traveling is district student

Payment Type:

Reimbursement – Traveling expenses will be paid by individual traveling

Registration Title: Name of travel event

Begin Date: Enter date the travel will begin

Projected Amount: Amount of Travel Registration

General Ledger Account: Enter the budget that will be used to expense the purchase. The "General Ledger Account" can be provided by the secretary/bookkeeper.

General Ledger Account entered on the General Tab will default to all other categories

Registration Expense

Advance Required: Yes No

Expense For: Payment Type:

Registration Title:

Begin Date:

Projected Amount:

Fund	Func	Obj	SubObj	Org	PIC	Local	Year	Owner	Prct	Amount	Available Budget Balance
199		6411	000	004		000000	2022	004 Dobie High	100	125.00	
100%										\$125.00	

Attachments: Drop files here or use the Upload button to attach, up to 10 MB per file.

Notes: Characters remaining: 2000 (2000 max)

Attachments: Drop, Drag or Upload Supporting Documentation

Notes: Add any additional information related to the travel

Once completed, click **Save and Continue**



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create Travel
Request

DATE DEVELOPED: 07/15/2021 REVISED DATE: 10/28/2021

SUBJECT: Travel Request

LODGING CATEGORY DESCRIPTION OF FIELDS TO COMPLETE

Advance Required: ENTER "No". Employees will not be approved for Travel Advances. Student related travel advances can be requested. Federal funds will not be issued a travel advance.

Expense For:

Employee - individual traveling is a district employee

Non-Employee - Individual traveling is not a district employee/student, (i.e. chaperone)

Student/employee - Individuals traveling are student and district employee

Student - Individual traveling is district student

Payment Type:

Reimbursement - Traveling expenses will be paid by individual traveling

Hotel/Motel: Use Drop down, select Other

Other Hotel/Motel Name: Enter the name of place of lodging

Phone Number: Enter the contact main phone number of place of lodging

Zip Code/Address Line1/Address Line 2: Enter the address of place of lodging

State/City: Enter the location of place of lodging

Lodging Expense	
Advance Required:	★ <input type="radio"/> Yes <input checked="" type="radio"/> No
Expense For:	★ <input type="text" value="Employee"/> <input type="button" value="v"/> Payment Type: ★ <input type="text" value="Reimbursement"/> <input type="button" value="v"/>
Hotel/Motel:	★ <input type="text" value="Other"/> <input type="button" value="v"/>
Other Hotel/Motel Name:	<input type="text" value="Omni Austin Hotel Downt"/>
Phone Number:	★ <input type="text" value="512-476-3700"/>
Zip Code:	★ <input type="text" value="78701"/> - <input type="text"/>
Address Line 1:	★ <input type="text" value="700 San Jacinto, E 8th St"/>
Address Line 2:	<input type="text"/>
State:	★ <input type="text" value="Texas"/> <input type="button" value="v"/>
City:	★ <input type="text" value="AUSTIN"/> <input type="button" value="v"/>



FRONTLINE PROCEDURES

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ENTRY POINT:
Create Travel Request

DATE DEVELOPED: 07/15/2021 REVISED DATE: 10/28/2021

SUBJECT: Travel Request

Number of Occupants: Enter the number of individuals that will be occupying the place of lodging

Number of Rooms: Enter the number of rooms that will be occupied at the place of lodging

Number of Nights: Enter the number of nights at the place of lodging

Estimated Rate: Enter the nightly rate of place of lodging

Rate is Above GSA: GSA Rates for Lodging when using Federal Funds – Hotel Lodging involving Federal Funds cannot exceed GSA Rates. Hotel Lodging over GSA will be expensed to Local Funds. Additional information on GSA Rates can be found on pages 2 to 3 in the travel manual.

Confirmation Number: Enter the confirmation number if available of place of lodging

Projected Amount: Automatically calculated (Rate X Number of Nights)

General Ledger Account: Enter the budget that will be used to expense the purchase. The “General Ledger Account” can be provided by the secretary/bookkeeper.

Attachments: Drop, Drag or Upload Supporting Documentation

Notes: Add any additional information related to the travel

Once completed, click **Save and Continue**

Employee

Number of Occupants:

Number of Rooms:

Number of Nights:

Estimated Rate:

Rate is Above GSA: Yes No

Confirmation Number:

Projected Amount:

Fund	Func	Obj	SubObj	Org	PIC	Local	Year	Owner	Prct	Amount	Available Budget Balance
199	11	6411	000	004	11	000000	2022	004 Dobie High	100	300.00	\$1,483.64
100%										\$300.00	

Attachments

Drop files here

or use the Upload button to attach, up to 10 MB per file.

File Name Delete

Notes:
Characters remaining: 2000 (2000 max)



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create Travel
Request

DATE DEVELOPED: 07/15/2021 REVISED DATE: 10/28/2021

SUBJECT: Travel Request

VEHICLE CATEGORY DESCRIPTION OF FIELDS TO COMPLETE

Advance Required: ENTER "No". Employees will not be approved for Travel Advances. Student related travel advances can be requested. Federal funds will not be issued a travel advance.

Expense For:

Employee – individual traveling is a district employee

Non-Employee – Individual traveling is not a district employee/student, (i.e. chaperone)

Student/employee – Individuals traveling are student and district employee

Student – Individual traveling is district student

Payment Type:

Reimbursement – Cost will be reimbursed to the individual traveling

Vehicle Type:

Personal - Individual traveling is using personal car. System will require you to enter number of miles traveled.

Rental – Individual traveling will be renting a vehicle. System will require you to enter rental Information "Rental Company and Confirmation Number".

District – Individual traveling has made arrangements with Transportation Department to use a district vehicle.

Passenger Names: List individuals that will be traveling in the vehicle

Projected Amount: Amount that will be used for the requested travel

General Ledger Account: Enter the budget that will be used to expense the purchase. The "General Ledger Account" can be provided by the secretary/bookkeeper.

Attachments: Drop, Drag or Upload Supporting Documentation

Notes: Add any additional information related to the travel

Once completed, click **Save and Continue**

Vehicle Expense

Advance Required: Yes No

Expense For: Payment Type:

Vehicle Type:

Passenger Names:

Characters remaining: 1024 (1024 max)

Projected Amount:

Fund	Func	Obj	SubObj	Org	PIC	Local	Year	Owner	Prct	Amount	Available Budget Balance
199	41	6411	000	730	99	000000	2021	730 Accounting	100	0.00	\$7,609.83
100%										\$0.00	

Attachments

Drop files here

or use the Upload button to attach, up to 10 MB per file.

File Name Delete

Notes:

Characters remaining: 2000 (2000 max)



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create Travel Request

DATE DEVELOPED: 07/15/2021 REVISED DATE: 10/28/2021

SUBJECT: Travel Request

AIRLINE CATEGORY DESCRIPTION OF FIELDS TO COMPLETE

Advance Required: ENTER "No". Employees will not be approved for Travel Advances. Student related travel advances can be requested. Federal funds will not be issued a travel advance.

Expense For:

- Employee – individual traveling is a district employee
- Non-Employee – Individual traveling is not a district employee/student, (i.e. chaperone)
- Student/employee – Individuals traveling are student and district employee
- Student – Individual traveling is district student

Payment Type:

Reimbursement – Traveling expenses will be paid by individual traveling

Contact Phone #: Contact phone of airline

Birth Date of Traveler: Automatically populated by employee record if not enter date of birth of traveler

Gender of Traveler: Automatically populated by employee record if not enter gender of traveler

Departure- Preferred Airline/Date/Time/Flight Number/Confirmation:

Projected Amount: Enter cost of flight travel

General Ledger Account Number : Enter the budget that will be used to expense the purchase. The "General Ledger Account" can be provided by the secretary/bookkeeper

Attachments: Drop, Drag or Upload Supporting Documentation

Notes: Add any additional information related to the travel

Once completed, click **Save and Continue**

Airline Expense

Advance Required: Yes No

Expense For: Payment Type:

Contact Phone #:

Birth Date of Traveler:

Gender of Traveler: Male Female

Departure:

Preferred Airline: Date: Time:

Flight Number: Confirmation Number:

Return:

Preferred Airline: Date: Time:

Flight Number: Confirmation Number:

Projected Amount:

Fund	Func	Obj	SubObj	Org	PIC	Local	Year	Owner	Prct	Amount	Available Budget Balance
199	41	6411	000	730	99	000000	2021	730 Accounting	100	0.00	\$7,609.83
100%										\$0.00	

Attachments

Upload

Drop files here

or use the Upload button to attach, up to 10 MB per file.

File Name Delete

Notes:

Characters remaining: 2000 (2000 max)



FRONTLINE PROCEDURES

Pasadena ISD

ENTRY POINT:
Create Travel
Request

DATE DEVELOPED: 07/15/2021 REVISED DATE: 10/28/2021

SUBJECT: Travel Request

MEALS CATEGORY DESCRIPTION OF FIELDS TO COMPLETE

Advance Required: ENTER "No". Employees will not be approved for Travel Advances. Student related travel advances can be requested. Federal funds will not be issued a travel advance.

Expense For:

- Employee – individual traveling is a district employee
- Non-Employee – Individual traveling is not a district employee/student, (i.e. chaperone)
- Student/employee – Individuals traveling are student and district employee
- Student – Individual traveling is district student

Payment Type:

Reimbursement – Traveling expenses will be paid by individual traveling

Number of "Individuals": Enter the number of individuals traveling on this travel

Place Data here

Meals Expense

Advance Required: ★ Yes No

Expense For: ★ Payment Type: ★

Number of Employees: ★

[Continue](#)

☰ Meals Expenses

Type	For	Projected Amount

[Edit](#) [Delete](#)



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SUBJECT: Travel Request

*Clicking **Continue** takes you to the "Meal Expense" screen*

The system will prompt you to check:

District Paid: Check this box if the district will be reimbursing the amount of meals. AGENDA MUST BE ATTACHED.

Provided: Check this box if the meals will be provided during the travel

Meals Expense

Advance Required: ★ Yes No

Expense For: ★ Payment Type: ★

Number of Employees: ★

Date	Day of Week	Meal	District Paid	Provided	Per Diem	Projected
06-13-2021	Sunday	Breakfast			0.00	<input type="text"/>
		Lunch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12.00	<input type="text" value="12.00"/>
		Dinner	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	<input type="text" value="0.00"/>
06-14-2021	Monday	Breakfast	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9.00	<input type="text" value="9.00"/>
		Lunch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12.00	<input type="text" value="12.00"/>
		Dinner	<input checked="" type="checkbox"/>	<input type="checkbox"/>	15.00	<input type="text" value="15.00"/>
06-15-2021	Tuesday	Breakfast	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9.00	<input type="text" value="9.00"/>
		Lunch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12.00	<input type="text" value="12.00"/>
		Dinner	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0.00	<input type="text" value="0.00"/>
06-16-2021	Wednesday	Breakfast	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9.00	<input type="text" value="9.00"/>
		Lunch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12.00	<input type="text" value="12.00"/>
		Dinner			0.00	<input type="text"/>
Totals:					Max Reimbursement 90.00	



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SUBJECT: Travel Request

OTHER EXPENSES CATEGORY DESCRIPTION OF FIELDS TO COMPLETE

Advance Required: ENTER "No". Employees will not be approved for Travel Advances. Student related travel advances can be requested. Federal funds will not be issued a travel advance.

Expense For:

- Employee – individual traveling is a district employee
- Non-Employee – Individual traveling is not a district employee/student, (i.e. chaperone)
- Student/employee – Individuals traveling are student and district employee
- Student – Individual traveling is district student

Payment Type:

Reimbursement – Cost will be reimbursed to the individual traveling

Expense Name: Use Drop down to select expense

Projected Amount: Enter cost of expense

General Ledger Account: Enter the budget that will be used to expense the purchase. The "General Ledger Account" can be provided by the secretary/bookkeeper

Attachments: Drop, Drag or Upload Supporting Documentation

Notes: Add any additional information related to the travel
Once completed, click **Save and Continue**

Other Expense

Advance Required: Yes No

Expense For: Employee Non-Employee Student/Employee Student

Payment Type: Reimbursement Other

Expense Name:

Projected Amount:

Fund	Func	Obj	SubObj	Org	PIC	Local	Year	Owner	Prct	Amount	Available Budget Balance
199	41	6411	000	730	99	000000	2021	730 Accounting	100	0.00	\$7,609.83
100%										\$0.00	

Attachments: **Drop files here**
or use the Upload button to attach, up to 10 MB per file.

Notes: Characters remaining: 2000 (2000 max)



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SUBJECT: Travel Request

Submit/ Summary

This gives you a summary of all of the expense types you entered.

Summary													5 Records	
Expense Type	Expense Description	Payment Type	Expense For	Proj Amt	Actl Amt	Account Number	Traveler	Vendor	Check Number	Check Date	Needed By	A	N	
+	Event Registration	TASA Conference	Reimbursement	Employee	125.00		199.6411.000.004.000000	Franklin Moses						
+	Lodging	Omni Austin Hotel Downtown	Reimbursement	Employee	300.00		199.6411.000.004.000000	Franklin Moses						
+	Vehicle	Personal	Reimbursement	Employee	199.36		199.6411.000.004.000000	Franklin Moses						
+	Meals		Reimbursement	Employee	66.00		199.6411.000.004.1.000000	Franklin Moses						
+	Other	Parking - Hotel	Reimbursement	Employee	25.00		199.6411.000.004.000000	Franklin Moses						

Projected Total: 715.36
Actual Total: 0.00

General Section Attachments											1 Record	
Request ID	Event	City	Status	Next in Workflow	State	Departure Date	Return Date	Reimbursement Expected	Traveler	A	N	
+	75	TASA Conference	AUSTIN	Entered		TX	11-15-2021	11-17-2021	N	Franklin Moses ()		

[Submit](#)

Once everything is filled out, click **SUBMIT**



THE TRAVEL REQUEST IS READY FOR WORKFLOW APPROVAL