

Work Instruction

ZPHRRECORD000 - Record Guest Traveler (Document)

**ZPHRRECORD
000,
ZPHRRECORD
001,
ZPHRRECORD
002, TRIP**

Purpose

Use this procedure to request a personnel number for a guest traveler so that their travel expenses can be processed in IRIS.

A guest traveler is a person who needs to be reimbursed for travel expenses by The University of Tennessee, but who has had no previous association with UT (does not have a personnel number).

Examples of possible guest travelers include an applicant interviewing for a position, a student being recruited for an academic program, a guest speaker/lecturer, a member of an advisory committee, and a student traveling for the university (possibly attending a conference) who is not an employee.



If you need to process travel for a former employee, you should complete a T-6 form. The T-6 form is available at <http://treasurer.tennessee.edu/forms/T6.doc>.

Trigger

Perform this procedure when there is a need to record a person as a guest traveler.

Menu Path

Use the following menu path to begin this transaction:

- Select **Human Resources → Personnel Management → Administration → HR Master Data → ZPHRRECORD000 - Record Friend / Pending EE / Guest Traveler Request** to go to the *Record a Friend/Pending Employee/Guest Traveler* screen.

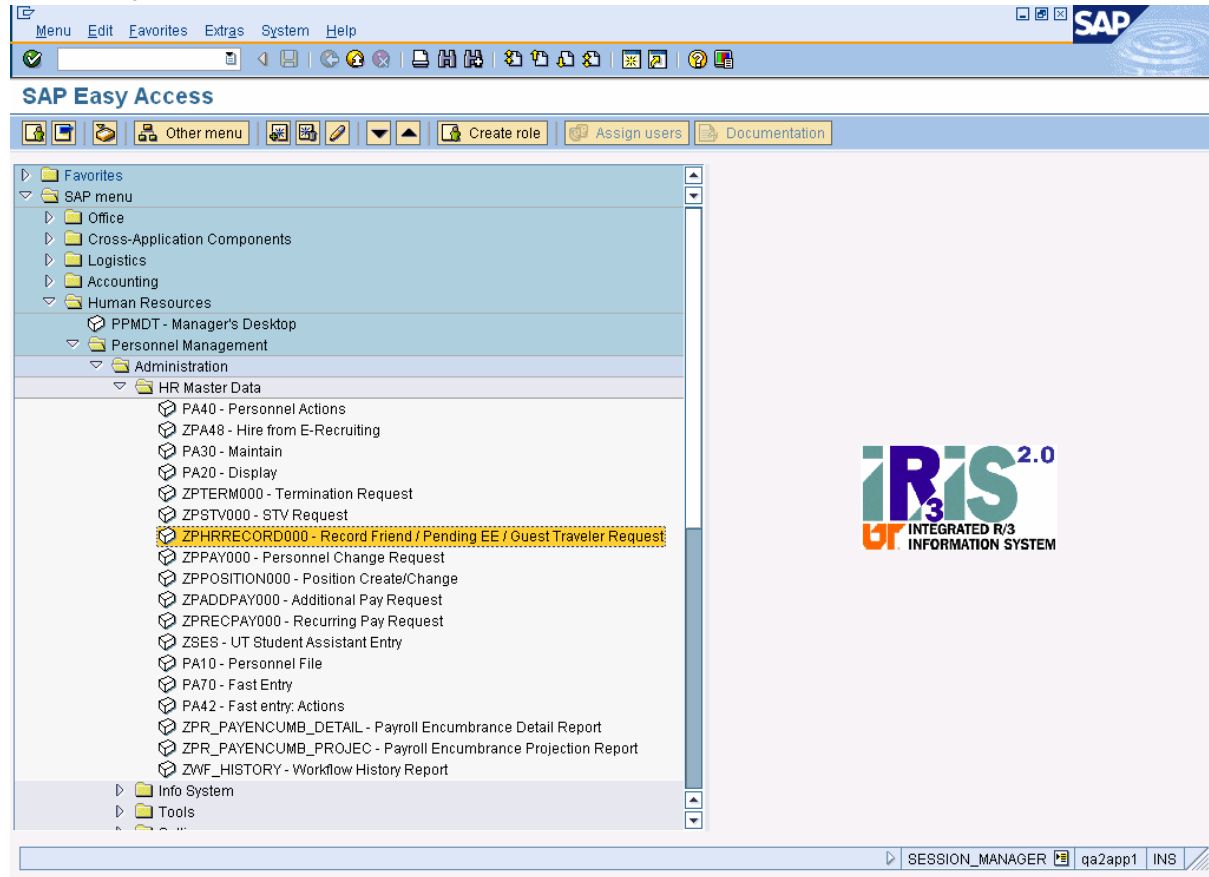
Transaction Code

ZPHRRECORD000, ZPHRRECORD001, ZPHRRECORD002, TRIP

Procedure

1. Start the transaction using the menu path or transaction code.

SAP Easy Access



2. Double-click **ZPHRRECORD000 - Record Friend / Pending EE / Guest Traveler Request**. The Record a Friend/Pending Employee/Guest Traveler screen will be displayed.

Record a Friend/Pending Employee/Guest Traveler

Request

Personnel no:

SSN:

Non-Resident Alien: (without SSN)

Actions | Workflow History


Type of Relationship

Friend
 Effective Date:
 Primary Position:

Pending Employee
 Effective Date:
 Expected Hire Date:
 Primary Position:

Guest Traveler
 Travel Start Date:
 Travel End Date:

ZPHRRECORD000 | qa2app1 | INS

- Click in the *Personnel no* field, click  (**Matchcode**), and use the *UT Employee Search* tab to check whether the person to be recorded as a guest traveler already has a personnel number in IRIS.

Field Name	R/O/C	Description
Personnel no:		Numbers that uniquely identify persons within IRIS. Example: 00103275



If a guest traveler already has a personnel number, a T-6 form should be used to process their travel expenses.

4. To create a new guest traveler, enter the SSN. If the traveler does not have a SSN, check the *Non-Resident Alien* box.

Field Name	R/O/C	Description
SSN:	C	A number given to an individual by the U.S. government program financed by employer and employee payments that provides retirement insurance, disability benefits, and unemployment compensation. Example: 999991114
Non-Resident Alien:	C	Check this box only if the person is a non-resident alien who does not have a social security number.



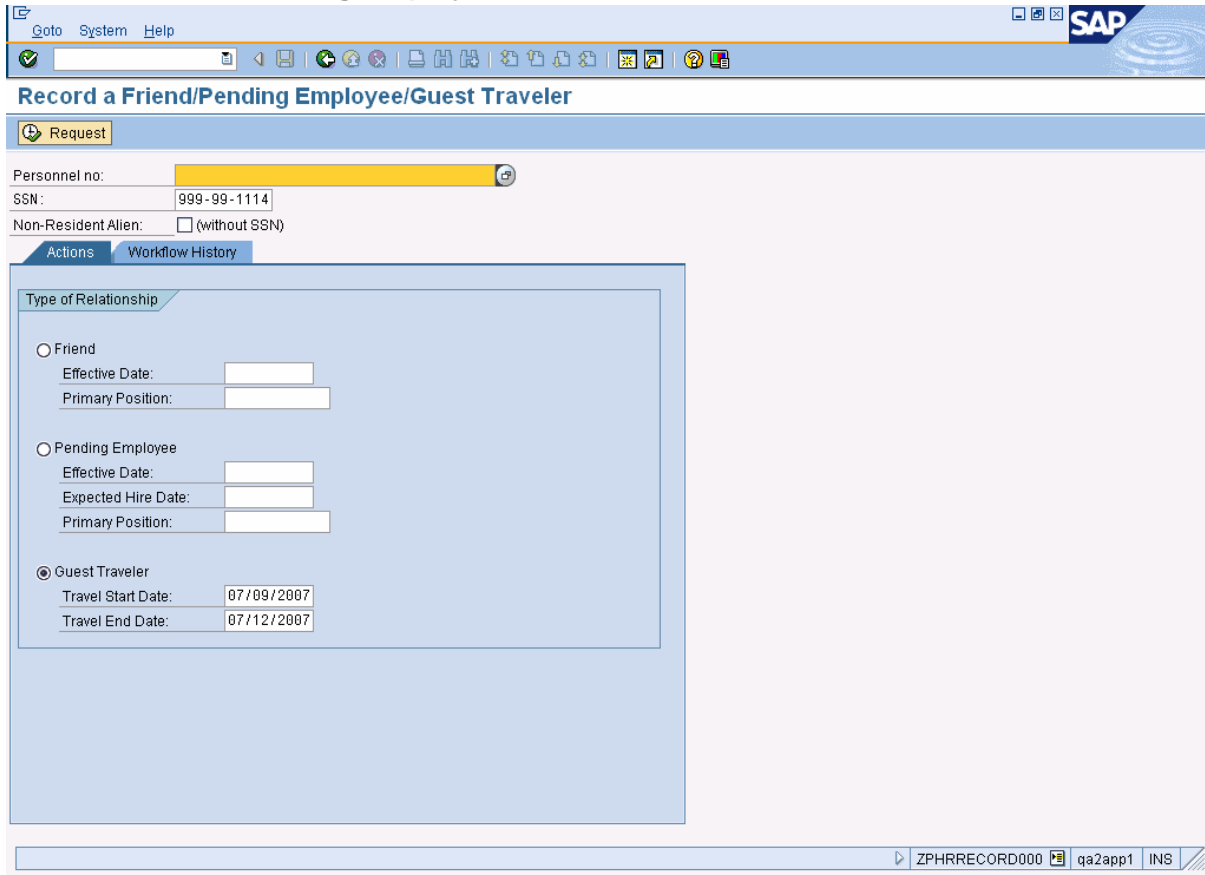
If the guest traveler has an ITIN and no social security number, check the *Non-Resident Alien* box and leave the SSN field blank. Do **NOT** enter the ITIN in the SSN field.

5. On the **Actions** tab, click Guest Traveler .
6. Complete the following fields:

Field Name	R/O/C	Description
Travel Start Date:	R	The date the trip will begin. Example: 07/09/2007
Travel End Date:	R	The date the trip will end. Example: 07/12/2007 If the person will be traveling multiple times as a guest traveler, this date should be after the last travel date.

Below is an example of a completed *Record a Friend/Pending Employee/Guest Traveler* screen for a guest traveler. In this example, the guest traveler is an applicant who will be traveling to campus for a faculty position interview.

Record a Friend/Pending Employee/Guest Traveler




The screenshot shows the SAP web interface for recording a guest traveler. At the top, there is a menu bar with 'Goto', 'System', and 'Help'. Below the menu bar is a toolbar with various icons. The main title of the screen is 'Record a Friend/Pending Employee/Guest Traveler'. Below the title is a 'Request' button. The form contains the following fields:

- Personnel no: [Redacted]
- SSN: 999-99-1114
- Non-Resident Alien: (without SSN)

There are two tabs: 'Actions' and 'Workflow History'. The 'Actions' tab is active, showing a 'Type of Relationship' section with three radio buttons:

- Friend
 - Effective Date: []
 - Primary Position: []
- Pending Employee
 - Effective Date: []
 - Expected Hire Date: []
 - Primary Position: []
- Guest Traveler
 - Travel Start Date: 07/09/2007
 - Travel End Date: 07/12/2007

At the bottom right of the screen, there is a status bar showing 'ZPHRRECORD000', 'qa2app1', and 'INS'.

7. Click . The request will be checked for errors. All errors must be corrected before you can continue. If no errors are found, the *Record – Guest Traveler* screen will be displayed, as shown below.

Record - Guest Traveler

Submit for Approval

Request Workflow Notes

Travel Start Date: 07/09/2007 Travel End Date: 07/12/2007

Personal Data

Title: []

Last Name: [] First Name: []

Middle Name: [] Designation: []

Suffix: [] Known As: []

Date of Birth: [] Marital Status: [] Gender: Female
 Male

Residence Status: [] Nationality: US American US Male

Addresses

Permanent Residence

c/o: []

Address line 1: []

Address line 2: []

City: []

State: [] Zip code: []

Country Key: US USA County code: []

Telephone number: [] Cell phone number: []

E-mail address: []

Phone release:

Primary Office Address []

Emergency Contact Address []

ZPHRRECORD000 | qa2app1 | INS



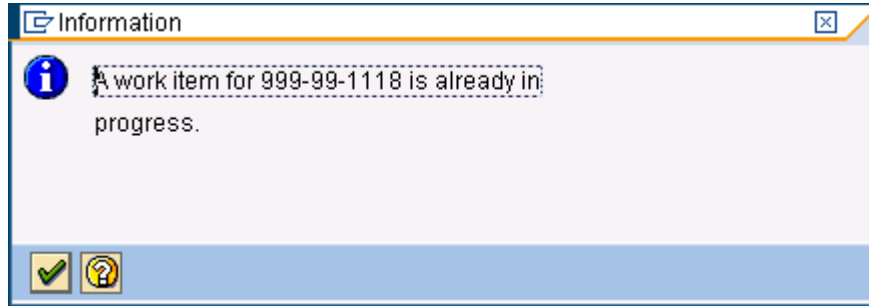
If only one error is found, it will be displayed at the bottom of the screen. For example, if a personnel number was entered to create the guest traveler, you will see the following error:

Person cannot be rehired as a Guest Traveler. Process travel using a T-6 form.

If multiple errors are found, the first error will display and there will be a note to see the error list. To view the error list, select **Goto → Error List** on the main menu bar.



Only one request at a time may be in progress for an individual. If you enter information for a person for whom a request has already been submitted in IRIS but has not yet been completed, you will receive an informational message, as shown below:



8. As required, complete the following fields in the *Personal Data* section:

Field Name	R/O/C	Description
Title	O	A courtesy title such as Mr, Mrs, Ms, Miss, or Dr. Example: Dr
Last Name:	R	Last name of the person. Example: Margrock
First Name:	R	First name of the person. Example: Ann
Middle Name:	O	Middle name of the person. Example: Marie
Designation	O	A distinguishing name or title. Example: PhD
Suffix	O	An abbreviation used after the last name such as Jr or III Example: Jr
Known As:	O	Another name for the person such as a preferred name. Example: Annie Margrock
Date of Birth:	O	The person's date of birth. Example: 01/01/1964
Marital Status	O	The condition of being married or single. Example: Single
Gender	O	The condition of being female or male. Example: Female
Residence Status	R	The person's residence status in relation to the US. Example: Citizen
Nationality	R	The person's nationality. Example: US American US

9. The *Addresses* section contains entry areas for three addresses. The *Permanent Residence* address is particularly important as this is where the guest traveler's expense checks will be sent. It will also be the only source of contact information for the guest traveler. As required, complete the following fields in the *Permanent Residence* section:

Field Name	R/O/C	Description
c/o:	O	"In care of" information, if needed. Example: Dr. Len Frankenstone
Address line 1:	R	The first line of the address. Example: 123 Quarry Lane
Address line 2:	O	The second line of the address, if needed. Example: Suite 105
City:	R	The city where the address is located. Example: Bedrock
State:	R	The state abbreviation in the address. Example: GA
Zip code:	R	The ZIP code in the address. Example: 30311
Country Key	R	The country of the address. Example: US USA
County code:	R	Indicator for the county in which the address is located. Example: 096 for Out of State, 047 for Knox County, TN
Telephone number:	O	The area code and telephone number. The first box is for the area code: Example: 404 The second box is for the telephone number: Example: 555-1212
Cell phone number:	O	The area code and telephone number for a cellular/mobile device. The first box is for the area code: Example: 404 The second box is for the telephone number: Example: 555-9999
E-mail address:	O	The string used to specify the person's electronic mail address. Example: ann-margrock@hotmail.com

Field Name	R/O/C	Description
Phone release:	O	An indicator of the type of address/phone information to be placed in a campus phone directory. Example: A for Complete Information



You may enter a foreign address using these fields if you change the *Country Key* to the appropriate country. This will change the edits for any other related fields such as *County code* and *Zip code*. For instance, if the *Country Key* is left at the default value US USA, the *Zip code* field will expect a five digit number (37996). If the *Country Key* is changed to Canada, the *Zip code* field edit will change to match the six-character Canadian format with alternating letters and numbers (A1B2C3). However, the names of the labels for the fields will not change.


10. The screen below shows basic information entered for Dr. Ann Margrock.

Record - Guest Traveler

The screenshot shows the SAP 'Record - Guest Traveler' interface. At the top, there is a navigation bar with 'Actions', 'Goto', 'System', and 'Help'. Below this is a toolbar with various icons. The main content area is titled 'Record - Guest Traveler' and includes a 'Submit for Approval' button. The form is divided into sections: 'Request' and 'Workflow Notes'. Under 'Request', there are fields for 'Travel Start Date' (07/09/2007) and 'Travel End Date' (07/12/2007). The 'Personal Data' section contains fields for Title (Dr), Last Name (Margrock), First Name (Ann), Middle Name, Designation (PhD), Suffix, Known As, Date of Birth, Marital Status, Gender (Female), Residence Status (Citizen), and Nationality (US American US). The 'Addresses' section includes 'Permanent Residence' with fields for c/o, Address line 1 (123 Quarry Lane), Address line 2, City (Bedrock), State (GA), Zip code (30311), Country Key (US USA), and County code (896). There are also fields for Telephone number, Cell phone number, E-mail address, and Phone release. Below 'Permanent Residence' are sections for 'Primary Office Address' and 'Emergency Contact Address'. The bottom status bar shows 'ZPHRRECORD000', 'qa2app1', and 'INS'.



The *Primary Office Address* section of the screen is optional for a guest traveler.


Click  to expand that section of the screen, as shown below.

Record - Guest Traveler

The screenshot shows the SAP 'Record - Guest Traveler' form. At the top, there is a navigation bar with 'Actions', 'Goto', 'System', and 'Help' menus, and a 'Submit for Approval' button. The main content area is titled 'Addresses' and contains three sections: 'Permanent Residence', 'Primary Office Address', and 'Emergency Contact Address'. The 'Permanent Residence' section is expanded and contains the following fields: c/o, Address line 1 (123 Quarry Lane), Address line 2, City (Bedrock), State (GA Georgia), Zip code (30311), Country Key (US USA), County code (096), Telephone number (404 555-1212), Cell phone number (404 555-9999), E-mail address (ann-margrock@hotmail.com), and Phone release. The 'Primary Office Address' section is collapsed. The 'Emergency Contact Address' section is also collapsed. The bottom status bar shows 'ZPHRRECORD000', 'qa2app1', and 'INS'.




The *Emergency Contact Address* section of the screen is optional for a guest traveler.


Click  to expand that section of the screen, as shown below.

Record - Guest Traveler

The screenshot shows the SAP web interface for 'Record - Guest Traveler'. At the top, there is a navigation bar with 'Actions', 'Goto', 'System', and 'Help' menus, and the SAP logo. Below this is a toolbar with various icons. The main content area is titled 'Record - Guest Traveler' and contains a 'Submit for Approval' button. The form is divided into two sections: 'Primary Office Address' and 'Emergency Contact Address'. Both sections have a similar layout of input fields for address details. The 'Primary Office Address' section includes fields for Building, Room, Mail Stop, c/o, Address line 1, Address line 2, City, State, Zip code, Country Key (set to US USA), County code, Telephone number, and Phone release. The 'Emergency Contact Address' section includes fields for c/o, Address line 1, Address line 2, City, State, Zip code, Country Key (set to US USA), and Telephone number. The bottom status bar shows the document ID 'ZPHRRECORD000', user 'qa2app1', and role 'INS'.

11. Click  (**Enter**) to check for errors before submitting the form for approval.

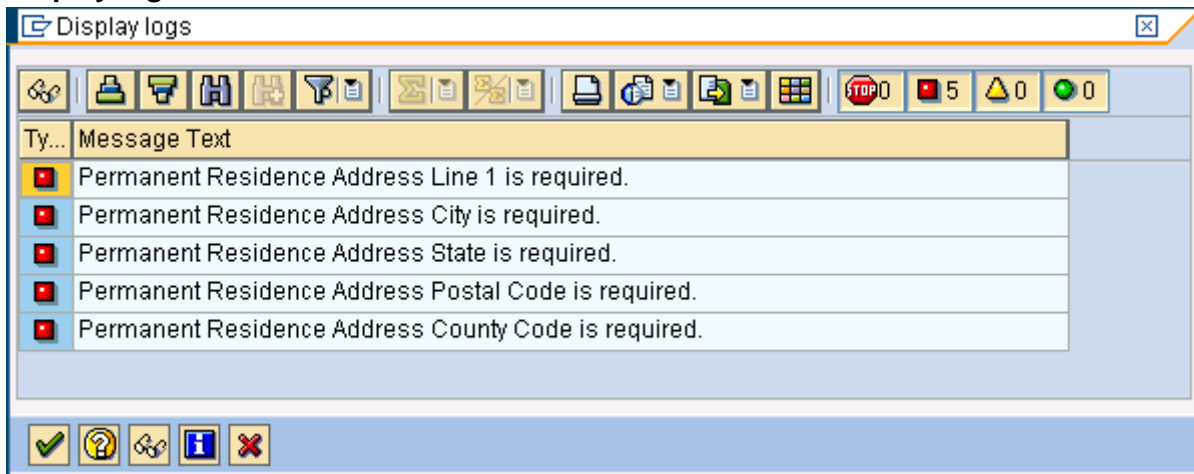
If only one error is found, the error will be displayed at the bottom of the screen.


If multiple errors are found, the first error will be displayed and there will be a note to see the error list. For example, if you did not make any entries in the *Permanent Residence* section before clicking  (**Enter**), you would see a message like this:

 Permanent Residence Address Line 1 is required. (See the Error List.)

Select **Goto** → **Error List** on the main menu bar to view the error list, as shown below.

Display logs



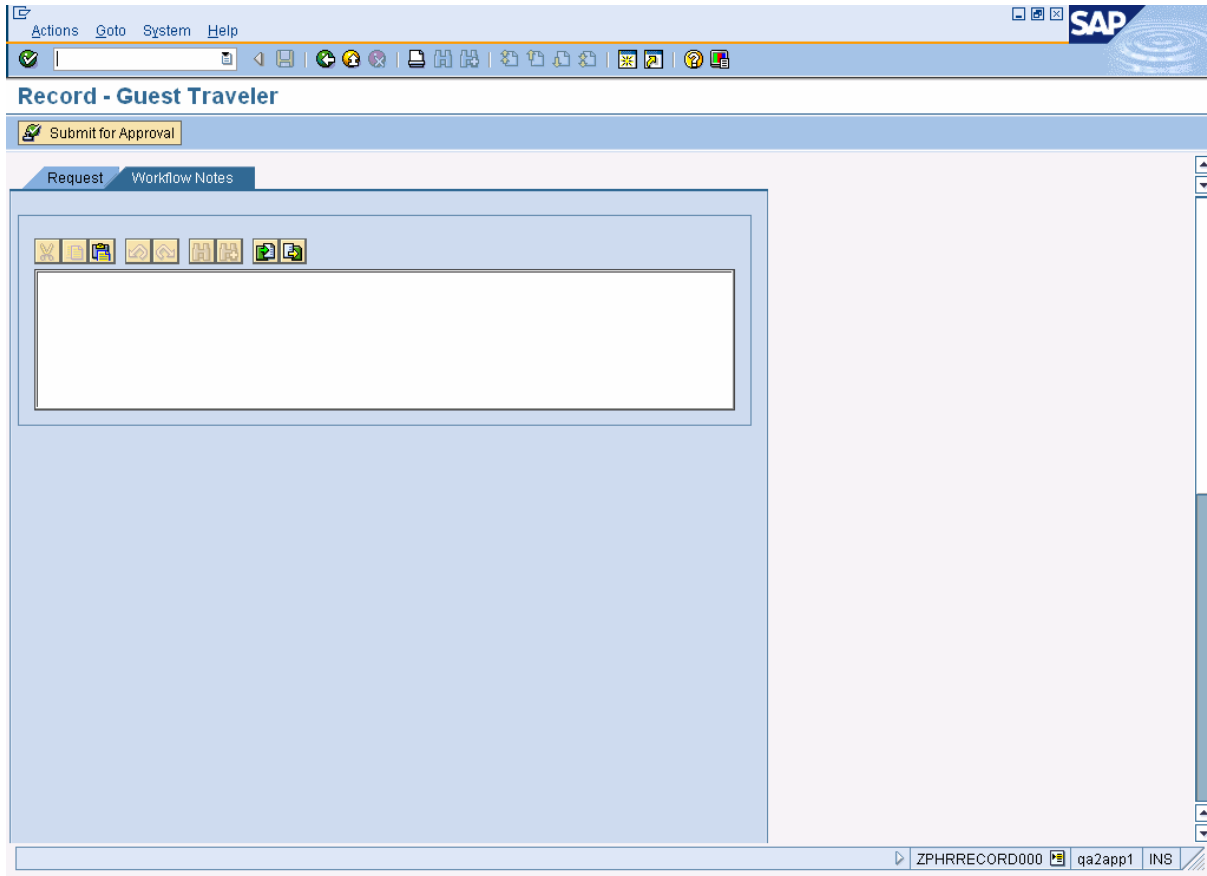
Additional help may be available for some error messages. If you see the icon  to the right of an error, click it for additional information.



All errors must be corrected before you can continue.

- Click the **Workflow Notes** tab to add information about the trip. In this example, travel expenses are to be reimbursed for a person interviewing for a faculty position.

Record - Guest Traveler



- Click into the textbox to type in the information. The screen below shows workflow notes added for this request.

Record - Guest Traveler


Record - Guest Traveler

Submit for Approval

Request Workflow Notes

Dr. Margrock is interviewing for a Faculty position with xxx department.

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14. If you want to print the request before submitting it for approval, click  (**Print**). The print version of the request is shown below.

Record Guest Traveler

The screenshot shows the SAP 'Record Guest Traveler' form. At the top, the header indicates the action being taken: 'Record Guest Traveler'. The form is populated with the following information:

The University of Tennessee		Date:	06/06/2007
Record Guest Traveler			16:24:25

Personnel Number: _____ Margrock, Ann
Travel Start Date: 07/09/2007 Travel End Date: 07/12/2007

Personal Data

Title:	Dr	First:	Ann
Last Name:	Margrock	Designation:	PhD
Middle:		Known As:	
Suffix:		Gender:	Female
Date of Birth:		Marital Status:	
Residence Status:	C Citizen	Nationality:	US American

Permanent Residence Address

C/O:
Line 1: 123 Quarry Lane
Line 2:
City: Bedrock
State: GA Georgia Zip code: 30311
County Code: 096 Not in Tennessee
Country Key: US USA
Telephone number: 404 555-1212 Cell Phone Number: 404 555-9999
Phone Release:
E-Mail Address: ann-margrock@hotmail.com

Workflow Notes:
Dr. Margrock is interviewing for a Faculty position with xxx department.


The bottom of the screenshot shows the SAP status bar with the text: ZPHRRECORD000 qa2app1 INS


15. The request is displayed with all information entered. The header of the form reflects the action being taken. In this case, the header indicates *Record Guest Traveler*.



Notice the *Personnel Number* has not yet been assigned, as shown below. If you print the report, you may wish to record the personnel number on the blank line when you receive it via e-mail.

The University of Tennessee		Date: 06/06/2007
Record Guest Traveler		16:24:25
Personnel Number: _____	Margrock, Ann	
Travel Start Date: 07/09/2007	Travel End Date:	07/12/2007
Personal Data		
Title: Dr	First: Ann	
Last Name: Margrock	Designation: PhD	
Middle:		

Click  **(Print)** again to select a printer and print the report.

16. Click  **(Back)** to return to the *Record – Guest Traveler* screen.

Record - Guest Traveler

Actions Goto System Help SAP

Record - Guest Traveler

Submit for Approval

Request Workflow Notes

Travel Start Date: 07/09/2007 Travel End Date: 07/12/2007

Personal Data

Title:	Dr				
Last Name:	Margrock	First Name:	Ann		
Middle Name:		Designation:	PhD		
Suffix:		Known As:			
Date of Birth:		Marital Status:		Gender:	<input checked="" type="checkbox"/> Female
Residence Status:	Citizen	Nationality:	US American US		<input type="checkbox"/> Male

Addresses

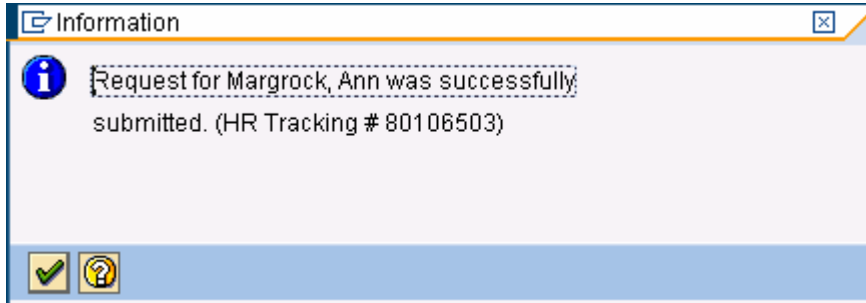
Permanent Residence
c/o:
Address line 1: 123 Quarry Lane
Address line 2:
City: Bedrock Not in Tennessee
State: GA Georgia Zip code: 30311
Country Key: US USA County code: 096
Telephone number: 404 555-1212 Cell phone number: 404 555-9999
E-mail address: ann-margrock@hotmail.com
Phone release:

Primary Office Address
Building:
Room: Mail Stop:
c/o:
Address line 1:

ZPHRRECORD000 qa2app1 INS

17. Click  to submit the request for approval.

Information




18. An informational message appears to let you know the request was successfully submitted. The message includes the traveler's name and an HR Tracking number. You will need the HR Tracking number to track the request in IRIS.



Write down the HR Tracking number as it is the best way to track the request through Workflow.



Click  (**Continue**) to return to the *Record a Friend/Pending Employee/Guest Traveler* screen.

Record a Friend/Pending Employee/Guest Traveler

The screenshot shows the SAP interface for recording a guest traveler. At the top, there is a menu bar with 'Goto', 'System', and 'Help'. Below it is a toolbar with various icons. The main title is 'Record a Friend/Pending Employee/Guest Traveler'. A 'Request' button is visible. The form includes fields for 'Personnel no.', 'SSN', and 'Non-Resident Alien' (with a checkbox for '(without SSN)'). There are two tabs: 'Actions' and 'Workflow History'. The 'Type of Relationship' section is expanded, showing three options: 'Friend', 'Pending Employee', and 'Guest Traveler'. The 'Guest Traveler' option is selected, and it has two date fields: 'Travel Start Date' (07/09/2007) and 'Travel End Date' (07/12/2007). At the bottom right, there is a status bar with 'ZPHRRECORD000', 'qa2app1', and 'INS'.

19. To check on the status of a guest traveler request, click on the **Workflow History** tab.



You may also use the **ZWF_HISTORY – Workflow History Report** transaction to check on the status of a guest traveler request.

Record a Friend/Pending Employee/Guest Traveler

Goto System HelpSAP

Record a Friend/Pending Employee/Guest Traveler

Display Refresh List Sort Ascending Sort Descending

Personnel no:

ActionsWorkflow History

HR Tracking Number:

Date Submitted: to:

Originator's Userid:

Originator's Cost Ctr:

Friend/Pending Employee/Guest Traveler


Last Name/First Name:


Primary Position:

Status	Submitted	Final Appro...	Originator's Userid	Originator's...	Name in Requ

ZPHRRECORD000 qa2app1 INS

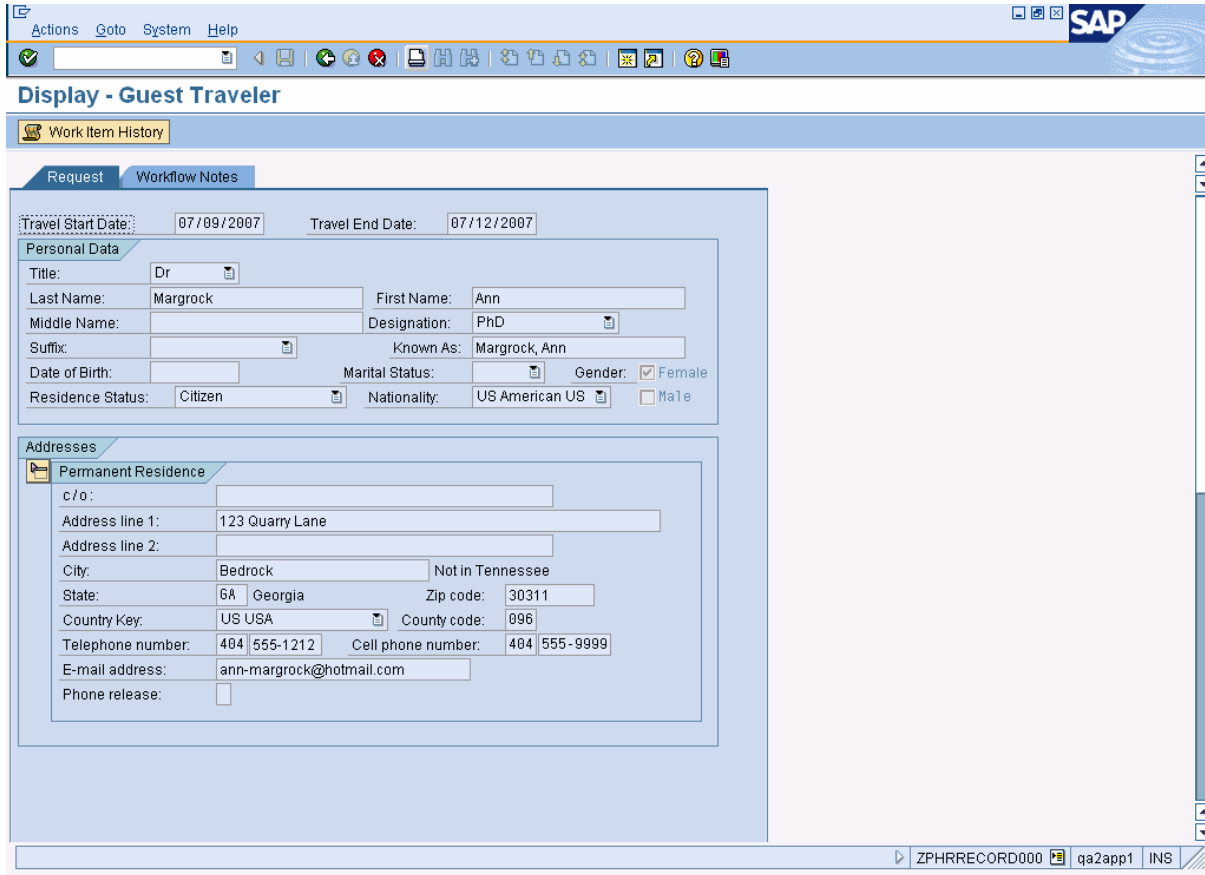
20. As required, complete/review the following fields:

Field Name	R/O/C	Description
HR Tracking Number:	O	A unique 8-digit number assigned to certain Human Resource requests. It is used to track the request through Workflow. Example: 80106503
Date Submitted:	O	The date the request was submitted to workflow. Example: 06/06/2007
Originator's Userid:	O	The unique user ID associated with the IRIS user who initiated the request. Example: dexberge
Originator's Cost Ctr:	O	The responsible cost center of the IRIS user who initiated the request. Example: E170131
Last Name/First Name:	O	The last name of the person followed by the first name. Example: Margrock Ann
Primary Position:	O	A number that identifies the employee's primary position.  This field will always be 29999990 for guest travelers.

21. Click  (**Enter**). In this example, the *HR Tracking Number* field was used so only one record is displayed in the list of results. If one of the other selection criteria fields had been used, multiple records may have been returned.

23. Click  **Display** . The *Display – Guest Traveler* screen for the selected workflow item is displayed.

Display - Guest Traveler



The screenshot shows the SAP 'Display - Guest Traveler' interface. At the top, there is a menu bar with 'Actions', 'Goto', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main content area is titled 'Display - Guest Traveler' and contains a 'Work Item History' tab. The 'Request' tab is active, showing the following details:

Travel Start Date: 07/09/2007 **Travel End Date:** 07/12/2007

Personal Data

Title: Dr
Last Name: Margrock First Name: Ann
Middle Name: Designation: PhD
Suffix: Known As: Margrock, Ann
Date of Birth: Marital Status: Gender: Female
Residence Status: Citizen Nationality: US American US Male


Addresses


Permanent Residence

c/o:
Address line 1: 123 Quarry Lane
Address line 2:
City: Bedrock Not in Tennessee
State: GA Georgia Zip code: 30311
Country Key: US USA County code: 096
Telephone number: 404 555-1212 Cell phone number: 404 555-9999
E-mail address: ann-margrock@hotmail.com
Phone release:

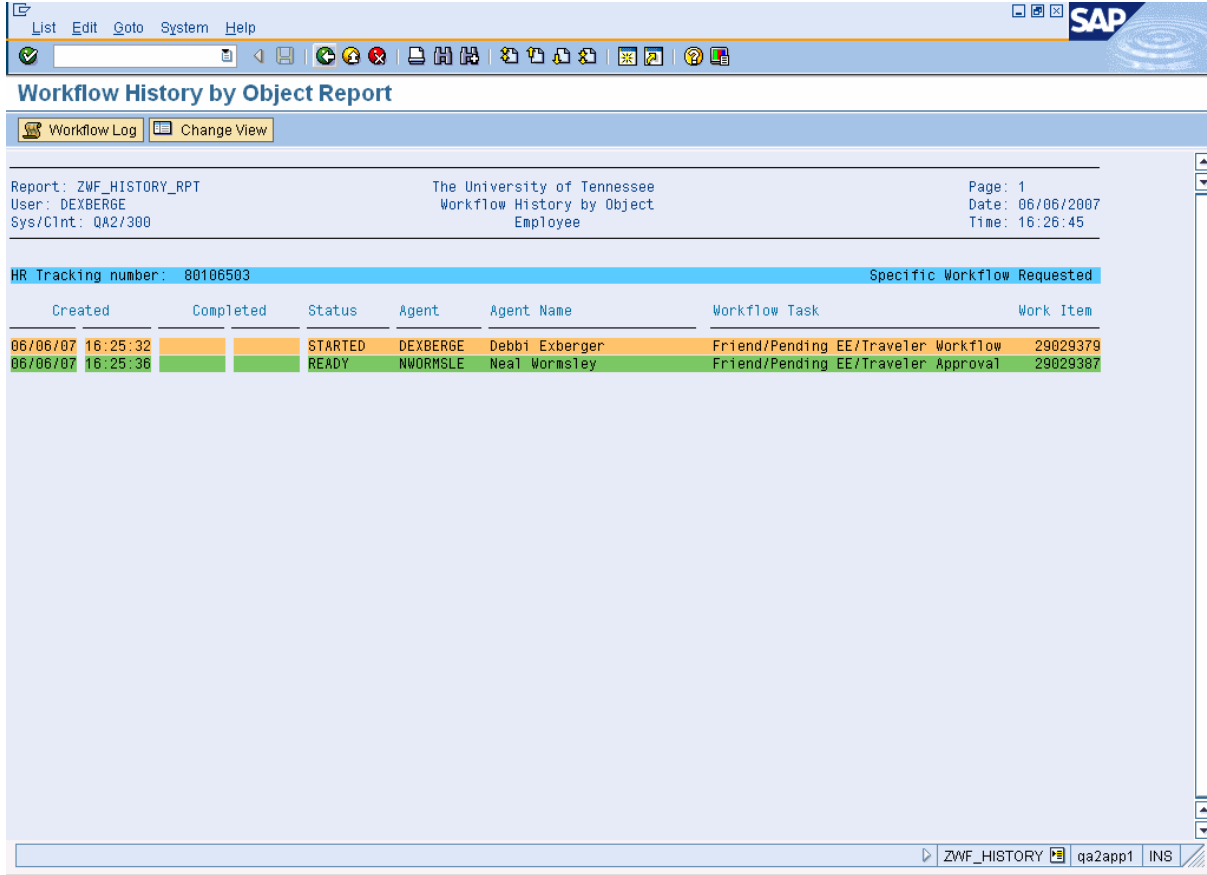
At the bottom of the screen, the status bar shows 'ZPHRRECORD000', 'qa2app1', and 'INS'.



You may print the request from this display by clicking  **(Print)**. The report will have an additional section for *Workflow Task History* if the request is printed after being submitted for approval.


24. Click  **Work Item History** if you wish to see who has the item in workflow. In this example, the item is ready for approval by Neal Wormsley.

Workflow History by Object Report

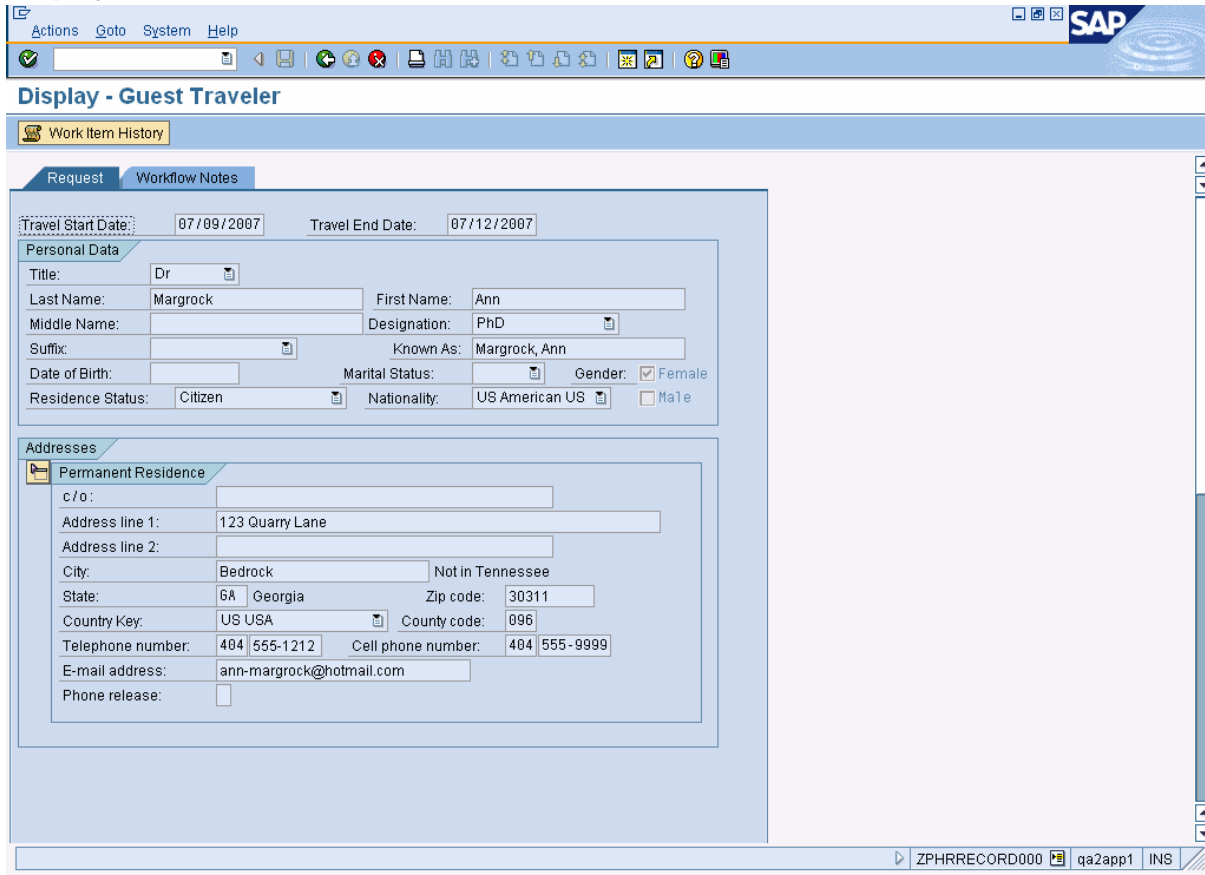


The screenshot shows the SAP 'Workflow History by Object Report' interface. At the top, there is a menu bar with 'List', 'Edit', 'Goto', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main content area has a title bar with 'Workflow Log' and 'Change View' buttons. The report header includes: Report: ZWF_HISTORY_RPT, User: DEXBERGE, Sys/CInt: QA2/300, The University of Tennessee, Workflow History by Object Employee, Page: 1, Date: 06/06/2007, Time: 16:26:45. The main data table is titled 'HR Tracking number: 80106503' and 'Specific Workflow Requested'. It has columns for Created, Completed, Status, Agent, Agent Name, Workflow Task, and Work Item. Two rows are visible: one with status 'STARTED' for agent 'Debbi Exberger' and another with status 'READY' for agent 'Neal Wormsley'. The bottom status bar shows 'ZWF_HISTORY', 'qa2app1', and 'INS'.

Created	Completed	Status	Agent	Agent Name	Workflow Task	Work Item
06/06/07 16:25:32		STARTED	DEXBERGE	Debbi Exberger	Friend/Pending EE/Traveler Workflow	29029379
06/06/07 16:25:36		READY	NWORMSLE	Neal Wormsley	Friend/Pending EE/Traveler Approval	29029387

25. Click  **(Back)** to return to the *Display – Guest Traveler* screen.

Display - Guest Traveler



The screenshot shows the SAP 'Display - Guest Traveler' interface. At the top, there is a menu bar with 'Actions', 'Goto', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main content area is titled 'Display - Guest Traveler' and contains a 'Work Item History' tab. The 'Request' tab is active, showing 'Travel Start Date: 07/09/2007' and 'Travel End Date: 07/12/2007'. The 'Personal Data' section includes fields for Title (Dr), Last Name (Margrock), First Name (Ann), Middle Name, Designation (PhD), Suffix, Known As (Margrock, Ann), Date of Birth, Marital Status, Gender (Female), Residence Status (Citizen), and Nationality (US American US). The 'Addresses' section is expanded to show 'Permanent Residence' details, including c/o, Address line 1 (123 Quarry Lane), Address line 2, City (Bedrock, Not in Tennessee), State (GA Georgia), Zip code (30311), Country Key (US USA), County code (096), Telephone number (404 555-1212), Cell phone number (404 555-9999), E-mail address (ann-margrock@hotmail.com), and Phone release (unchecked).

26. Click  (**Back**) to return to the *Record a Friend/Pending Employee/Guest Traveler* screen.



It is a good practice to verify that the changes to the requested record have been entered correctly into the IRIS system. You should be able to verify the accuracy of most changes to person data using transaction PA20 (Display HR Master Data) in the IRIS system. Please allow ample time for the central office to enter the changes.

Comments



For assistance, contact the IRIS Helpdesk at irishelpdesk@tennessee.edu.