Work Instruction

ZPHRRECORD000 - Record Guest Traveler (Document)

ZPHRRECORD000, ZPHRRECORD001, ZPHRRECORD002, 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**.**

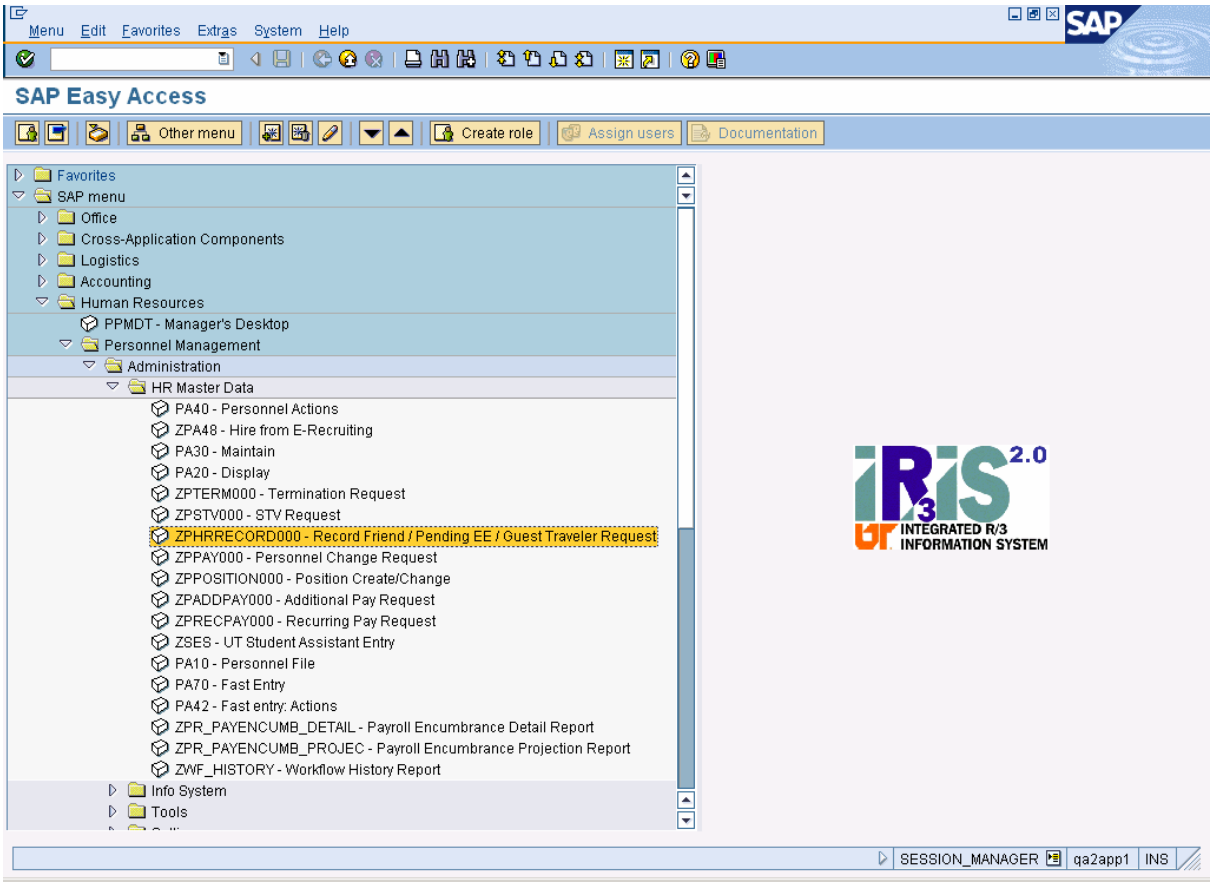
Transaction Code

ZPHRRECORD000, ZPHRRECORD001, ZPHRRECORD002, TRIP

Procedure

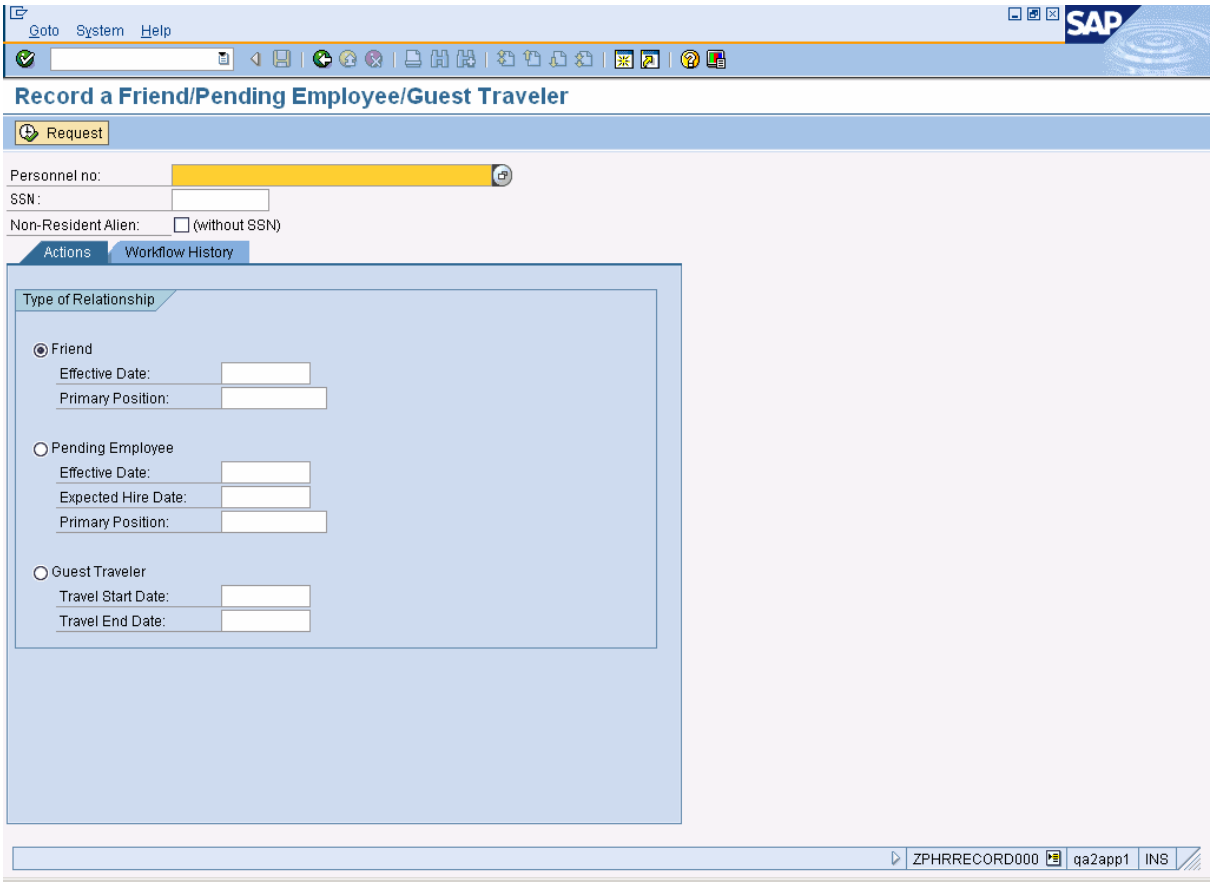
1. Start the transaction using the menu path or transaction code.

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



3. 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.

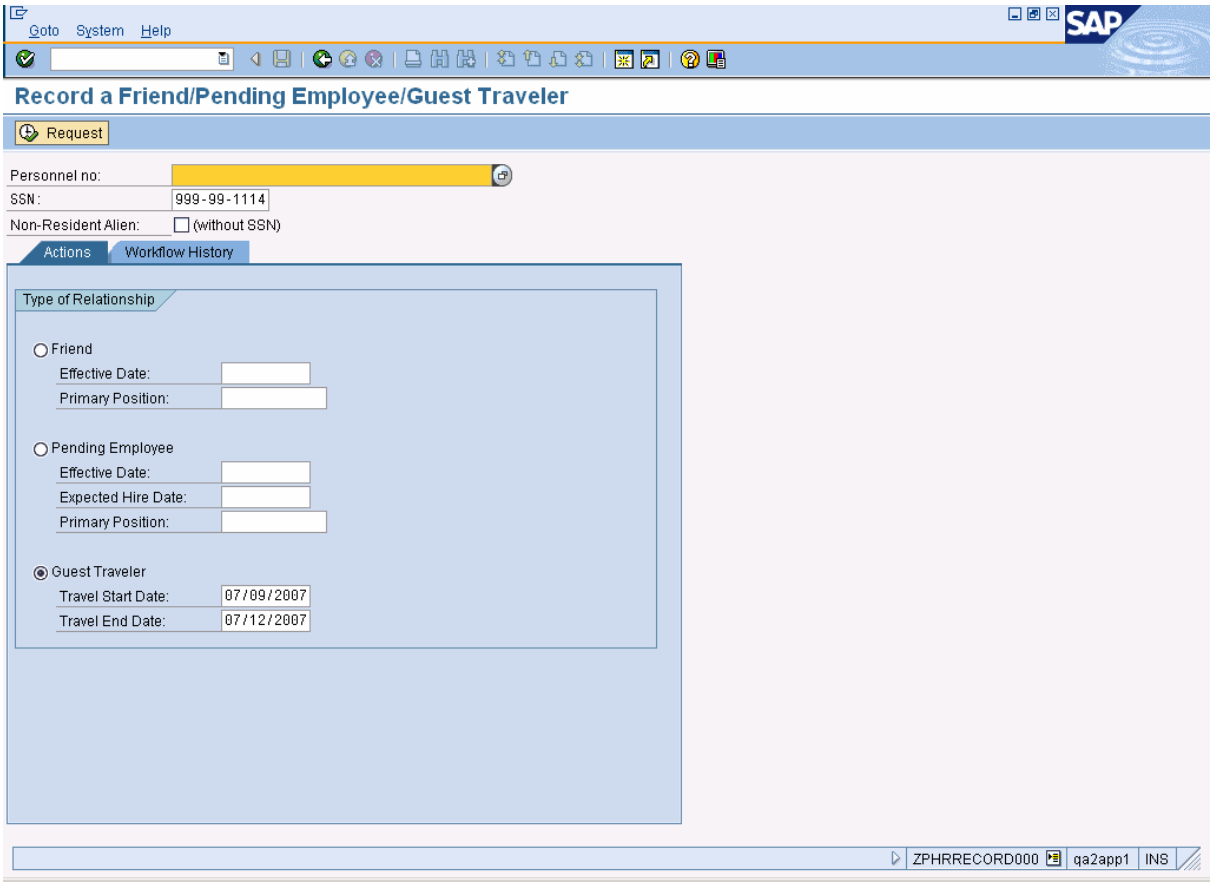
5. On the Actions tab, click Guest Traveler.

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.

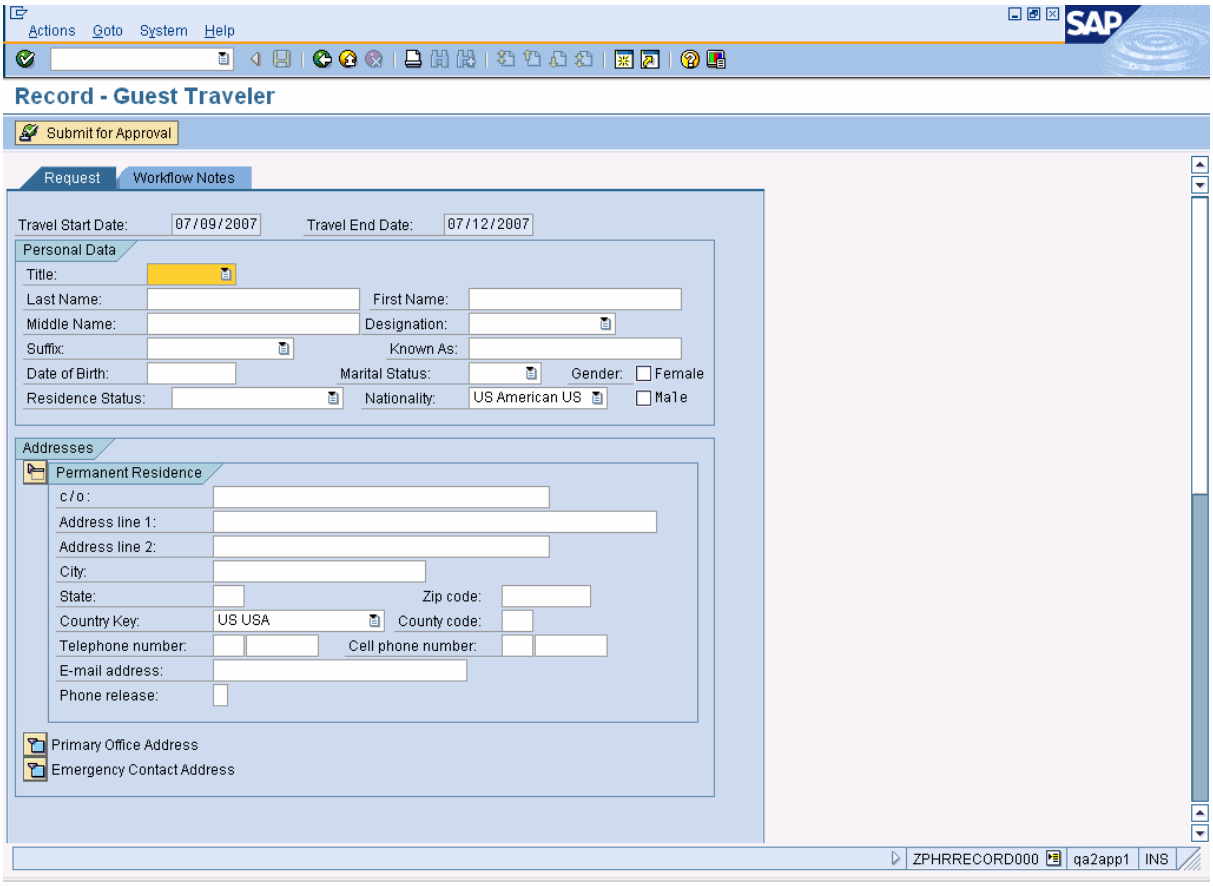
Below is an example of a completed *Record a Friend/Pending Employee/Guest Traveler* screen for a guest traveler. In this example, the guest traveler is an applicant who will be traveling to campus for a faculty position interview.

Record a Friend/Pending Employee/Guest Traveler



7. Click Request. 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

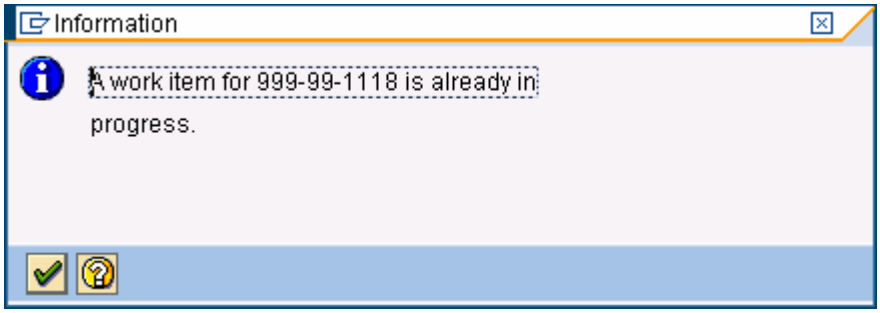


If only one error is found, it will be displayed at the bottom of the screen. For example, if a personnel number was entered to create the guest traveler, you will see the following error:

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:

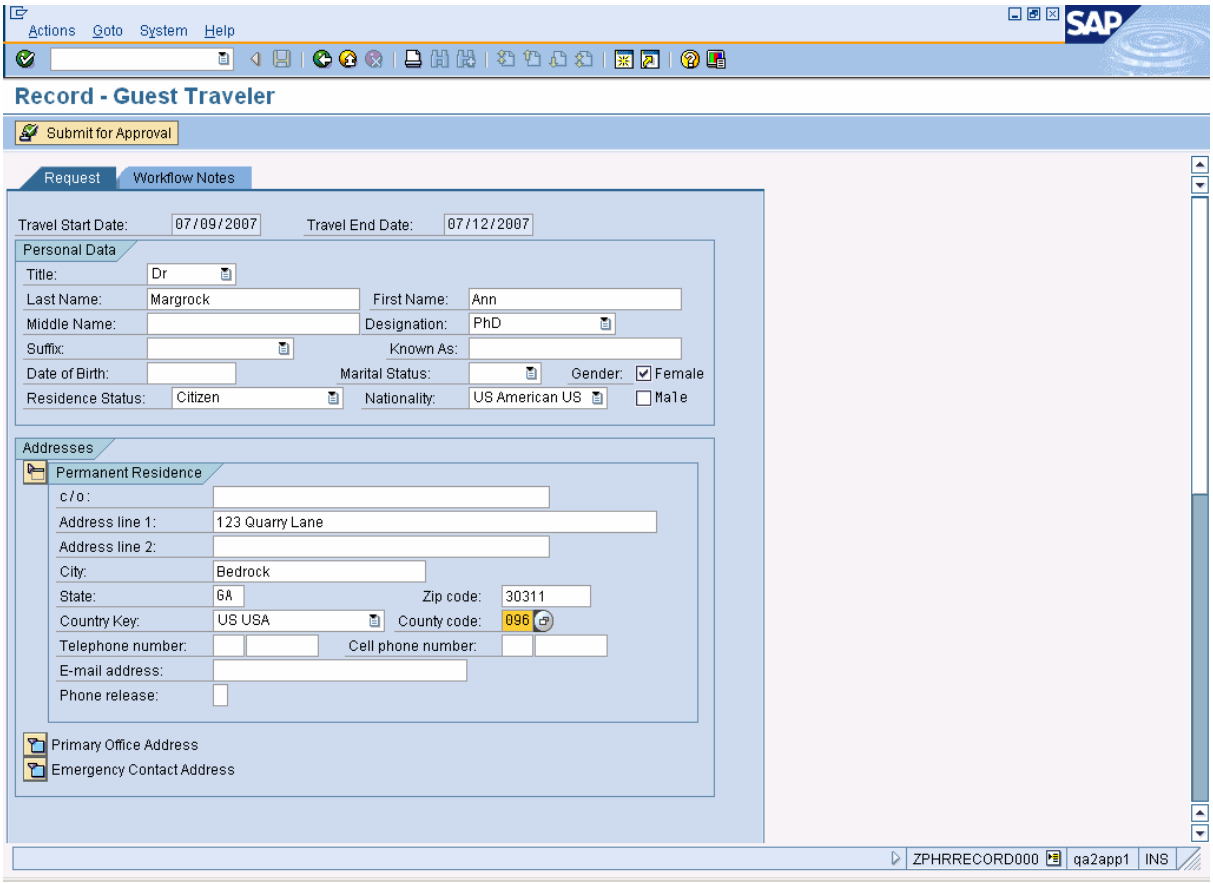
Field Name	R/O/C	Description
c/o:	O	"In care of" information, if needed. **Do not complete this field with the traveler's name.** **Example:** Dr. Len Frankenstone
Address line 1:	R	The first line of the address. **Example:** 123 Quarry Lane
Address line 2:	O	The second line of the address, if needed. **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.

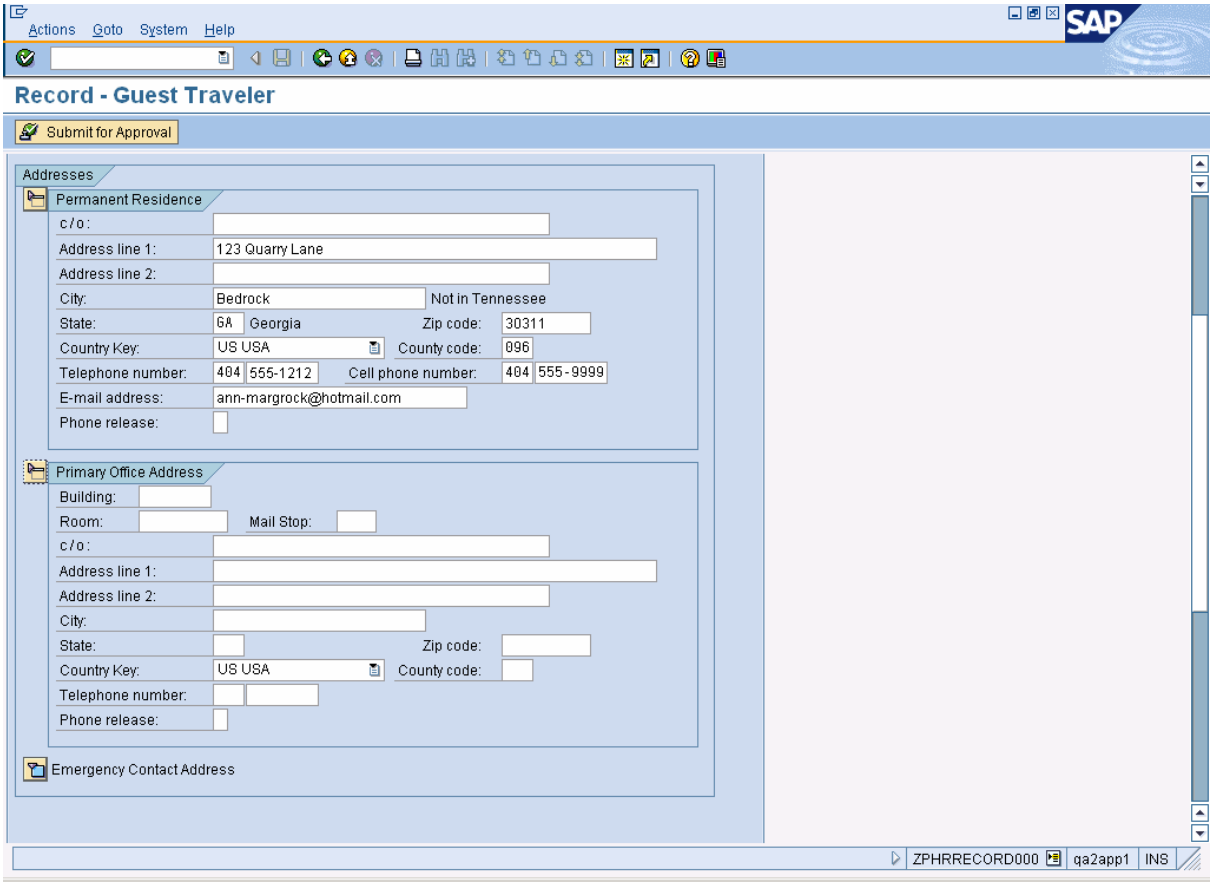
Record - Guest Traveler



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

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

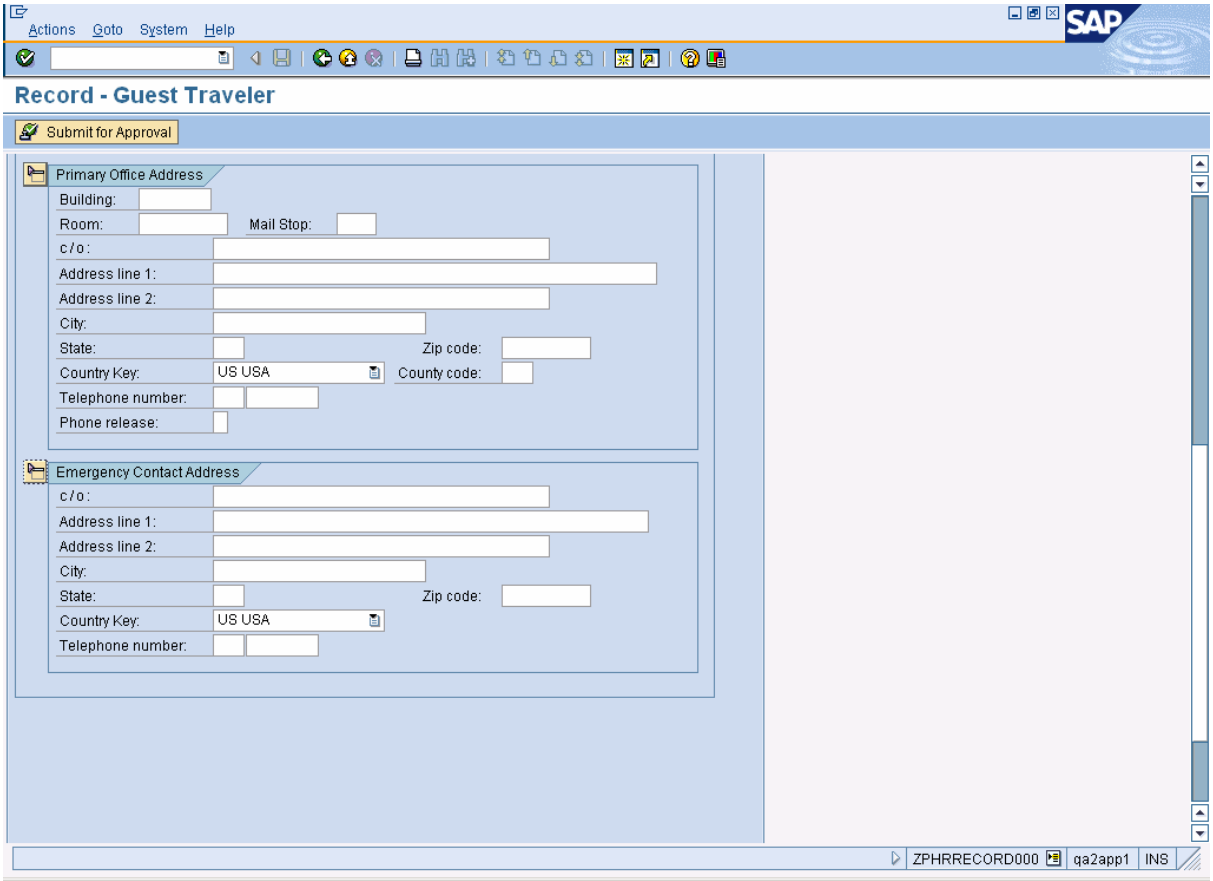
Record - Guest Traveler



The *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



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

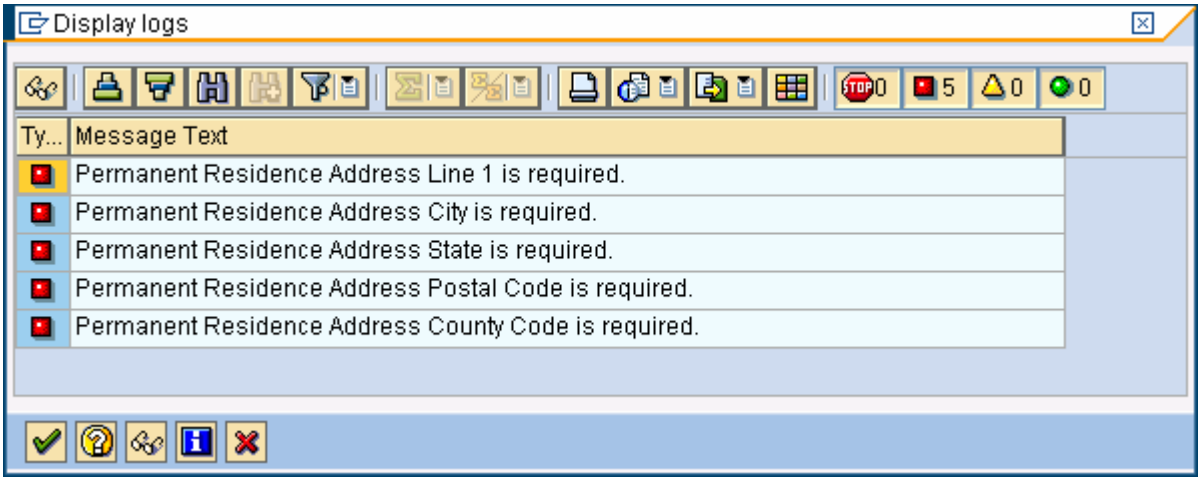
If only one error is found, the error will be displayed at the bottom of the screen.

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

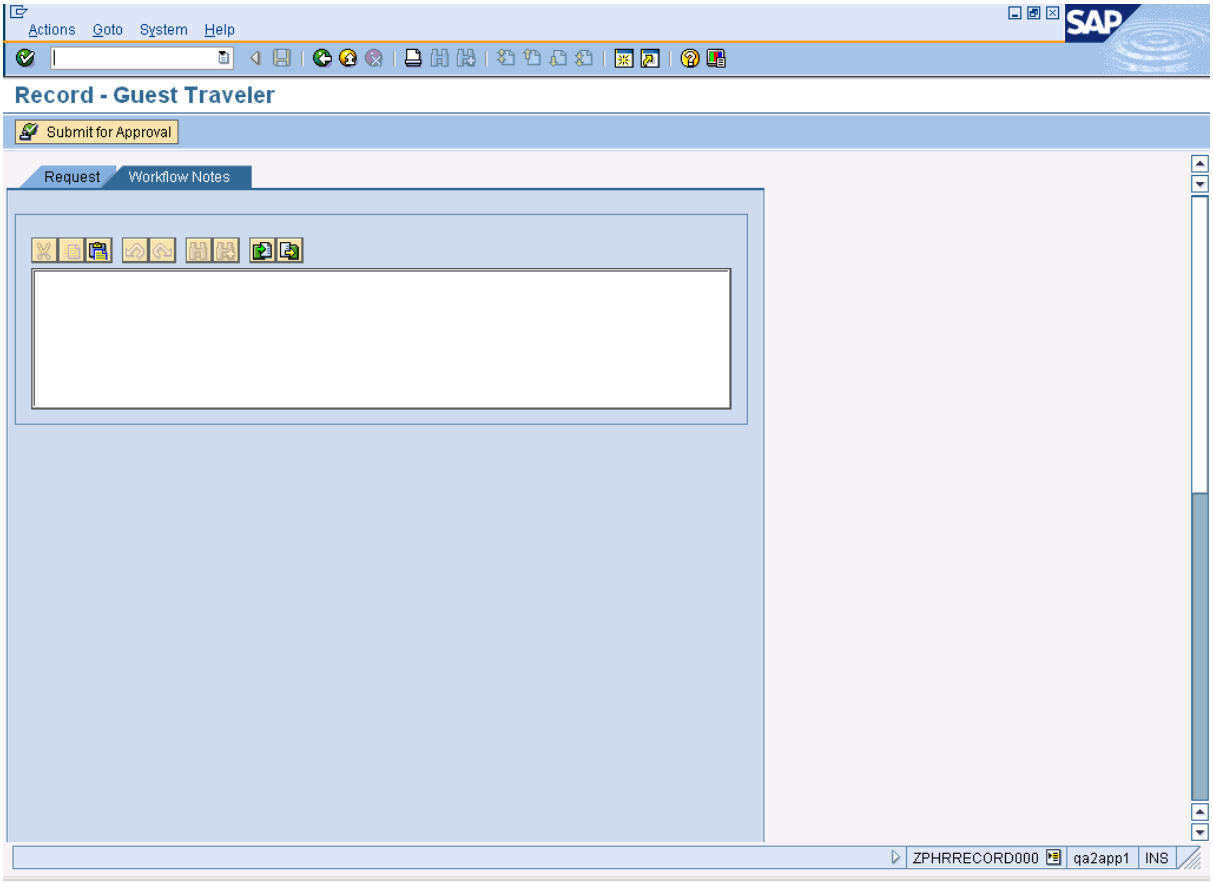


Additional help may be available for some error messages. If you see the icon to the right of an error, click it for additional information.

All errors must be corrected before you can continue.

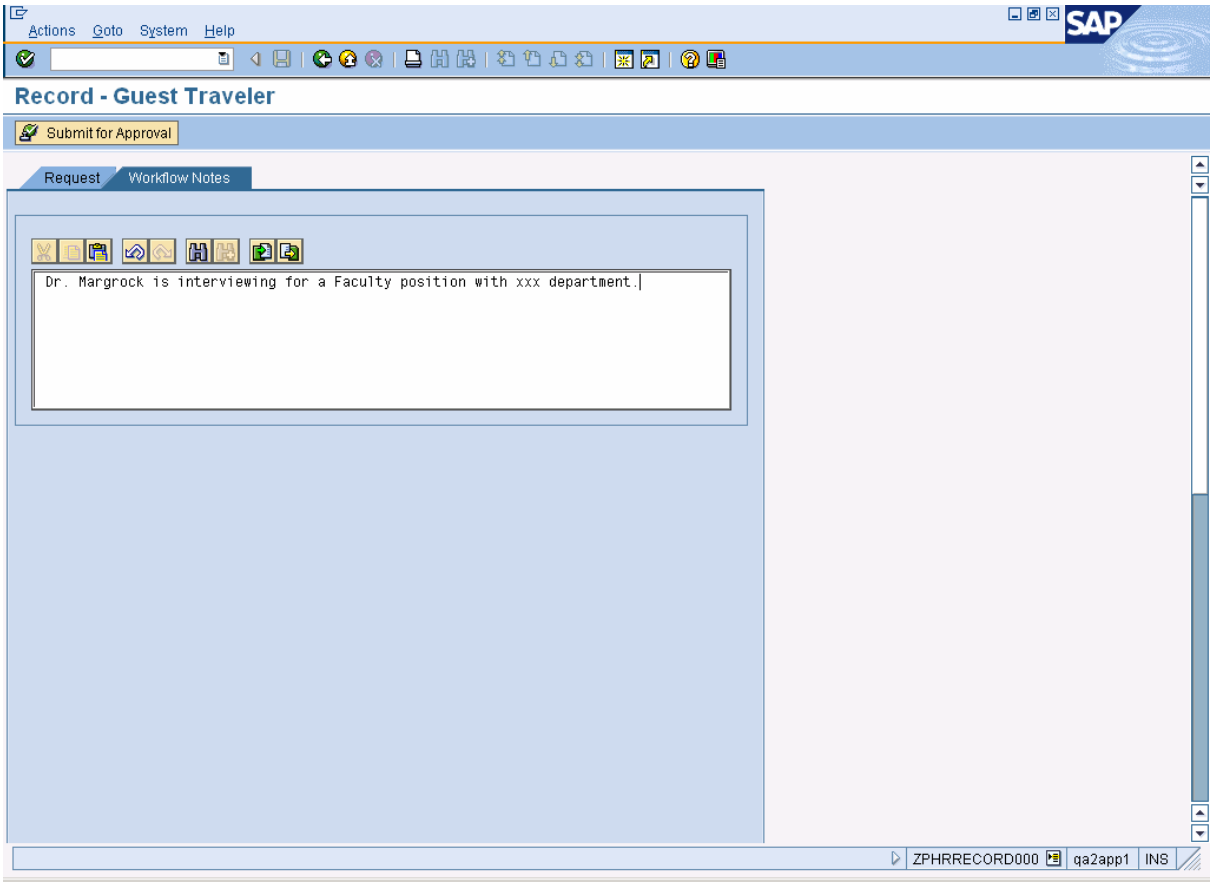
12. Click the Workflow Notes tab to add information about the trip. In this example, travel expenses are to be reimbursed for a person interviewing for a faculty position.

Record - Guest Traveler



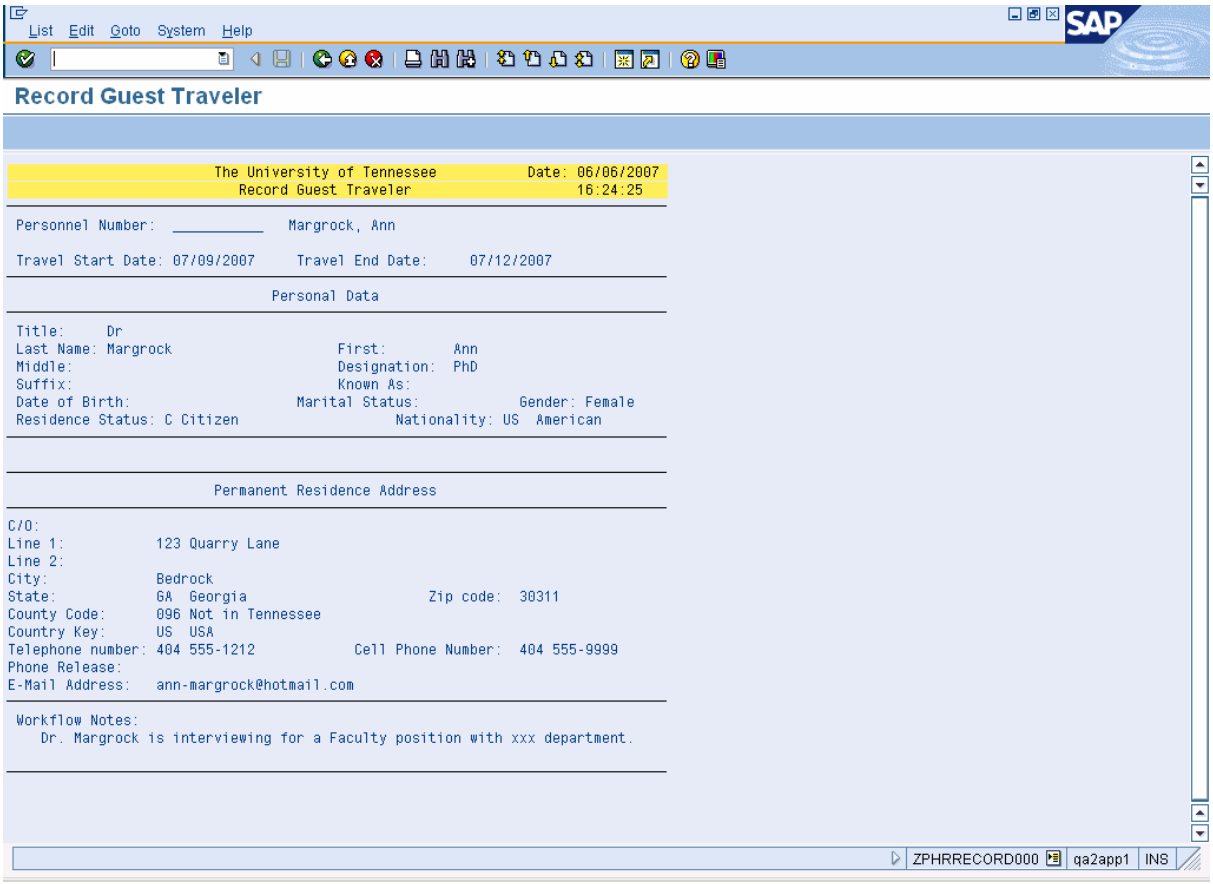
13. Click into the textbox to type in the information. The screen below shows workflow notes added for this request.

Record - Guest Traveler



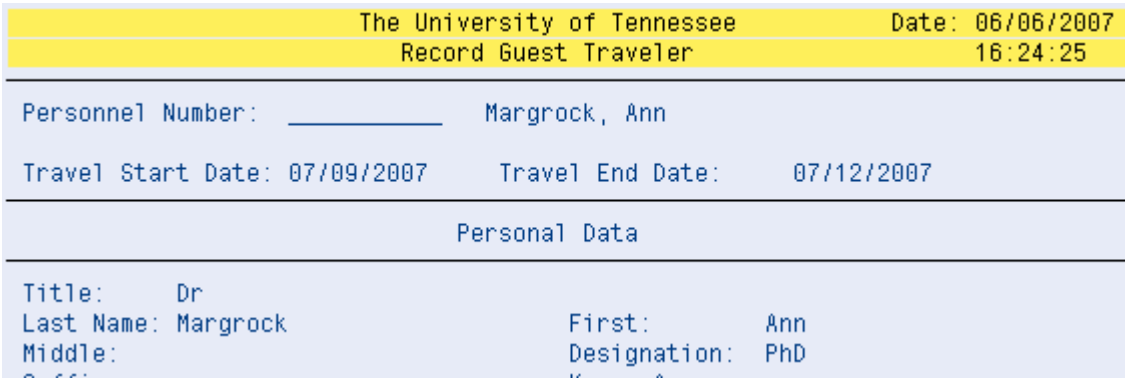
14. If you want to print the request before submitting it for approval, click **(Print)**. The print version of the request is shown below.

Record Guest Traveler



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

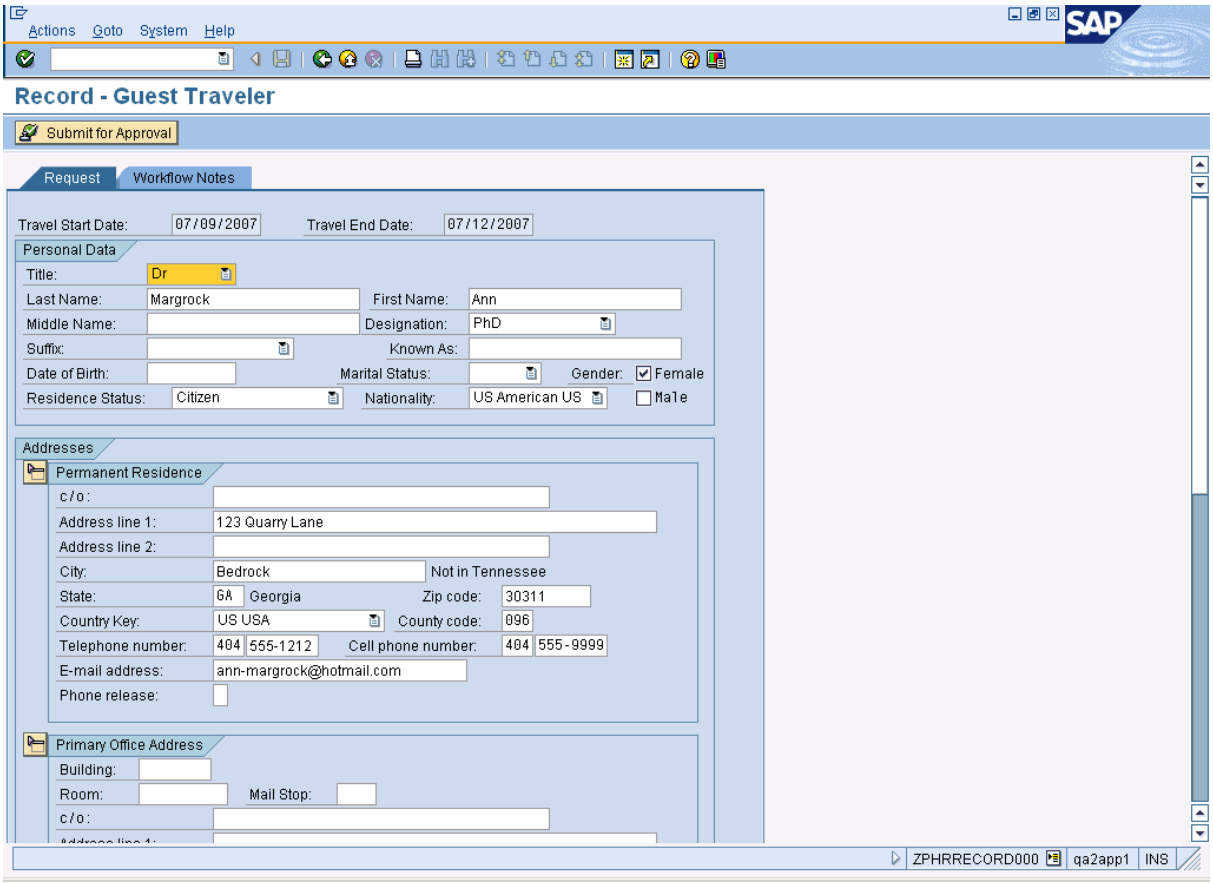
Personal Data

Title: Dr
Last Name: Margrock First: Ann
Middle: Designation: PhD

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

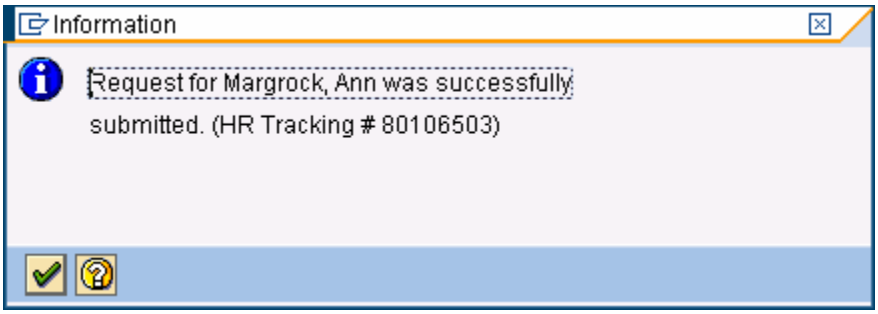
16. Click **(Back)** to return to the *Record – Guest Traveler* screen.

Record - Guest Traveler



17. Click Submit for Approval to submit the request for approval.

Information

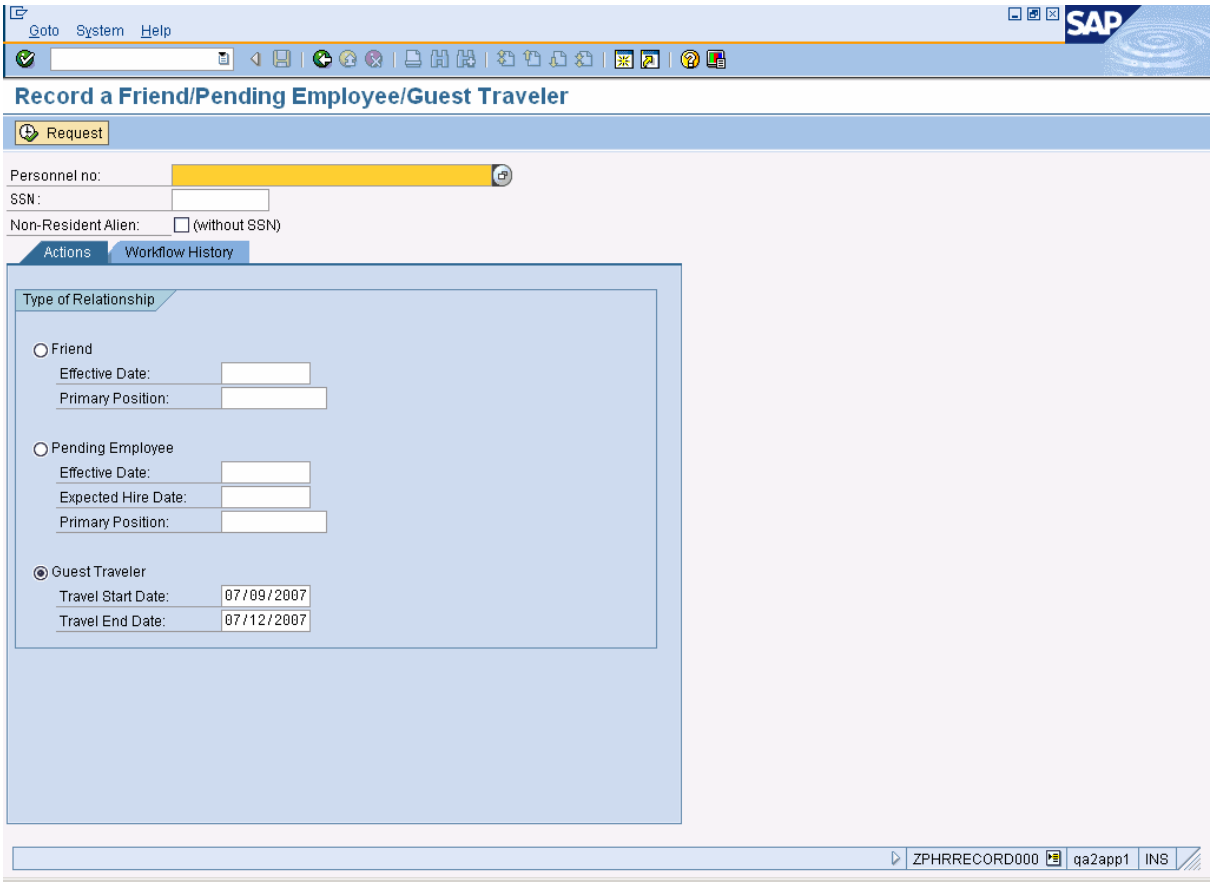


18. An informational message appears to let you know the request was successfully submitted. The message includes the traveler's name and an HR Tracking number. You will need the HR Tracking number to track the request in IRIS.

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.

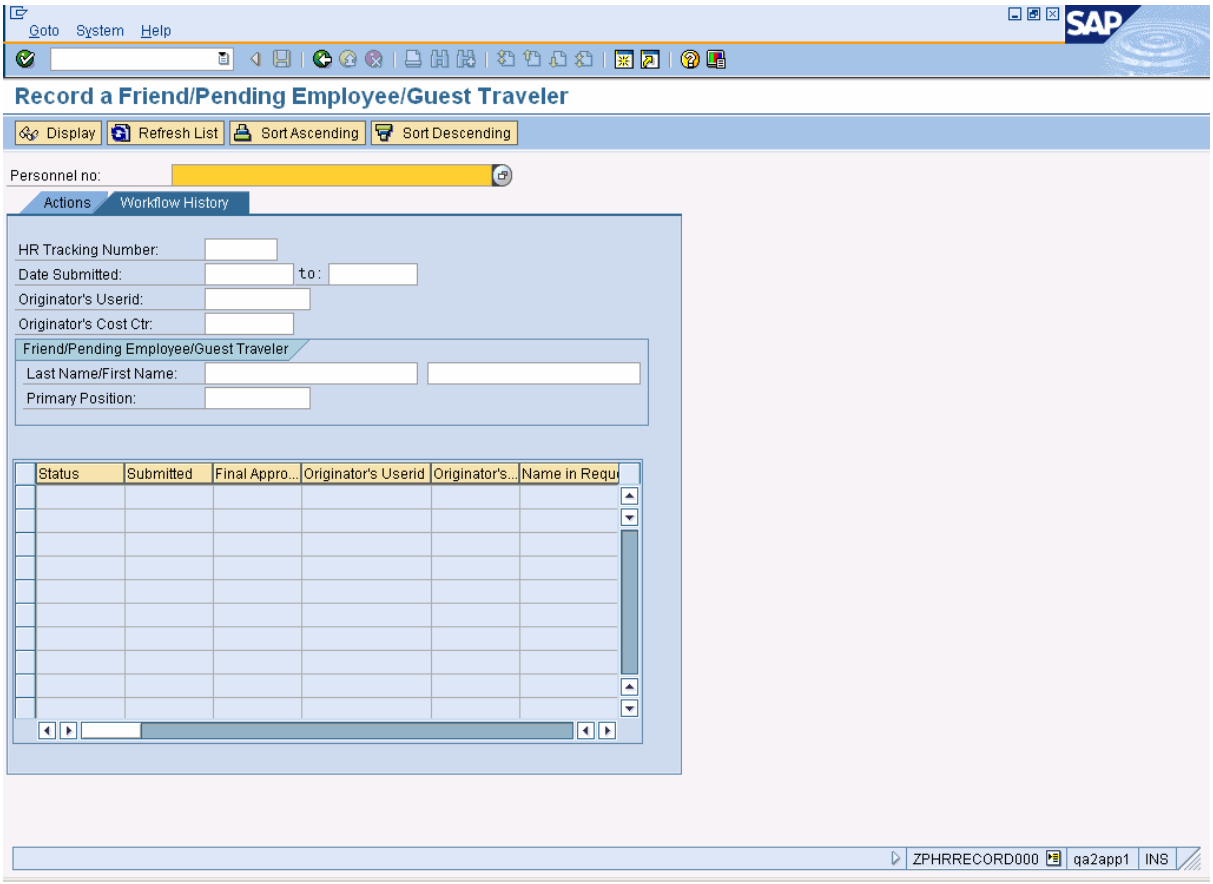
Record a Friend/Pending Employee/Guest Traveler



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

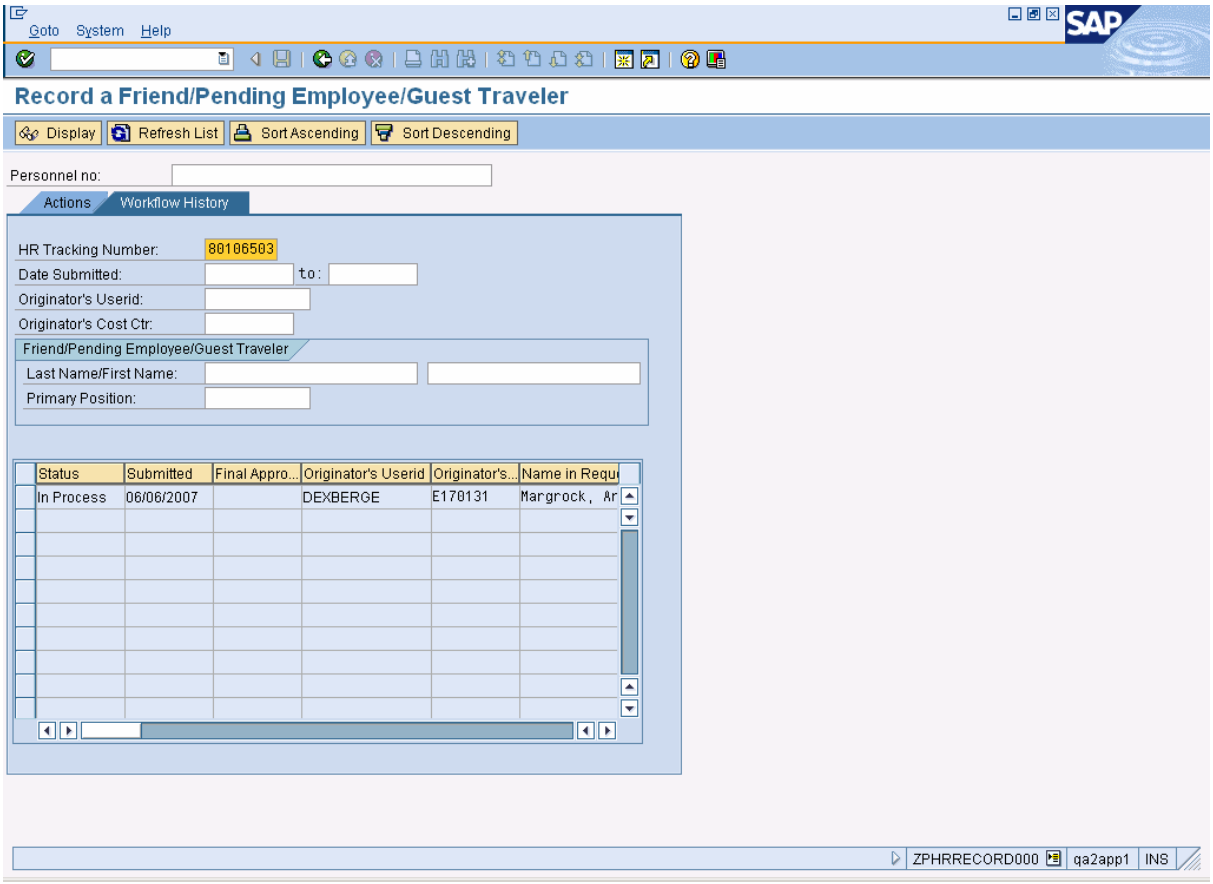


20. As required, complete/review the following fields:

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.

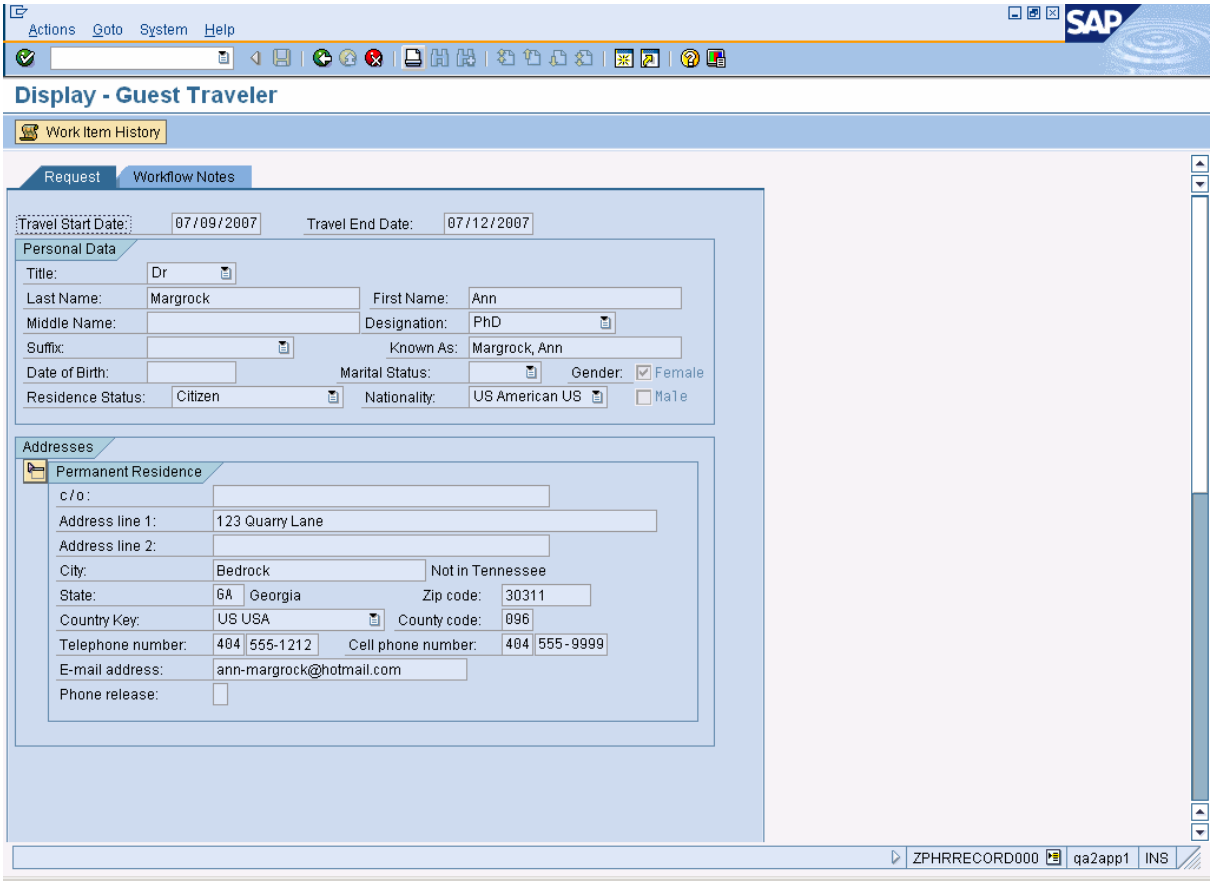
Record a Friend/Pending Employee/Guest Traveler



22. Click the selection box to the left of the workflow item you wish to view.

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

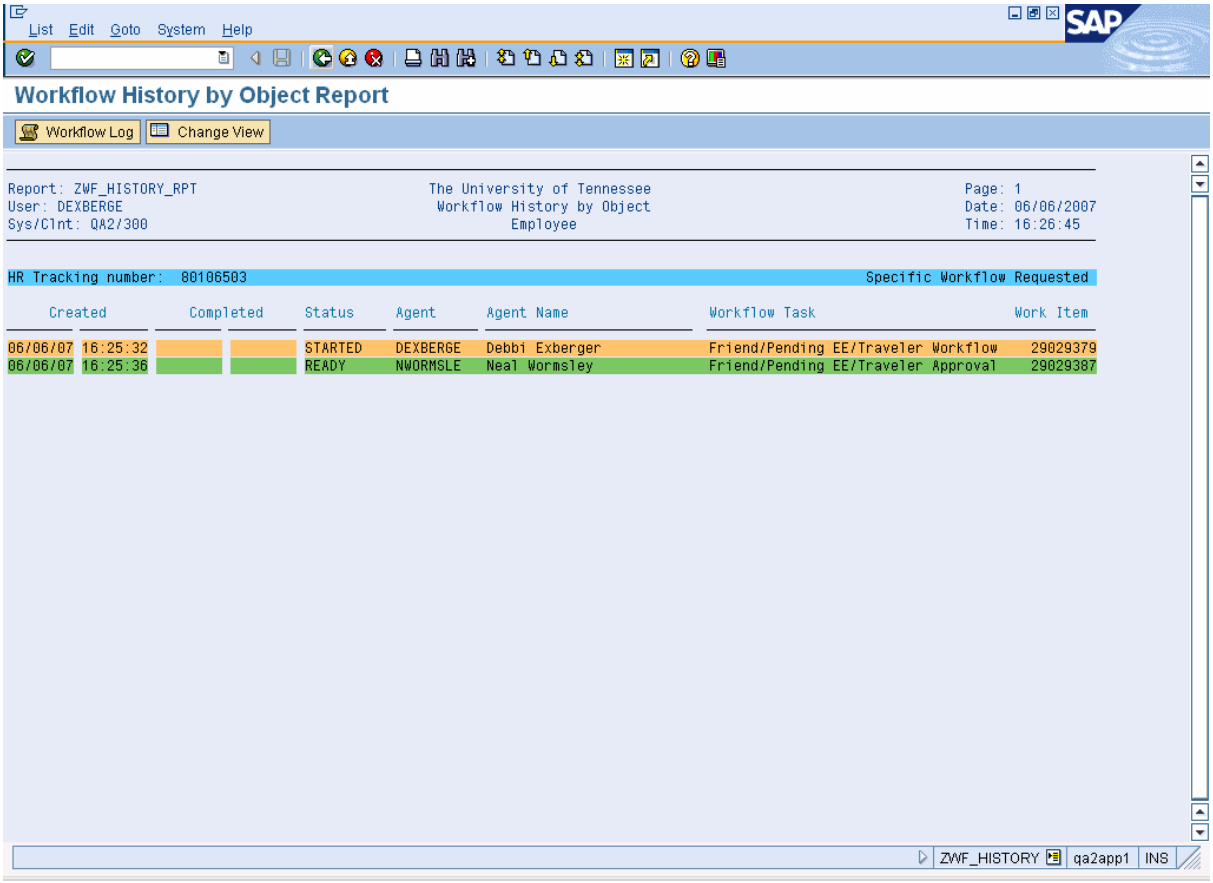
Display - Guest Traveler



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.

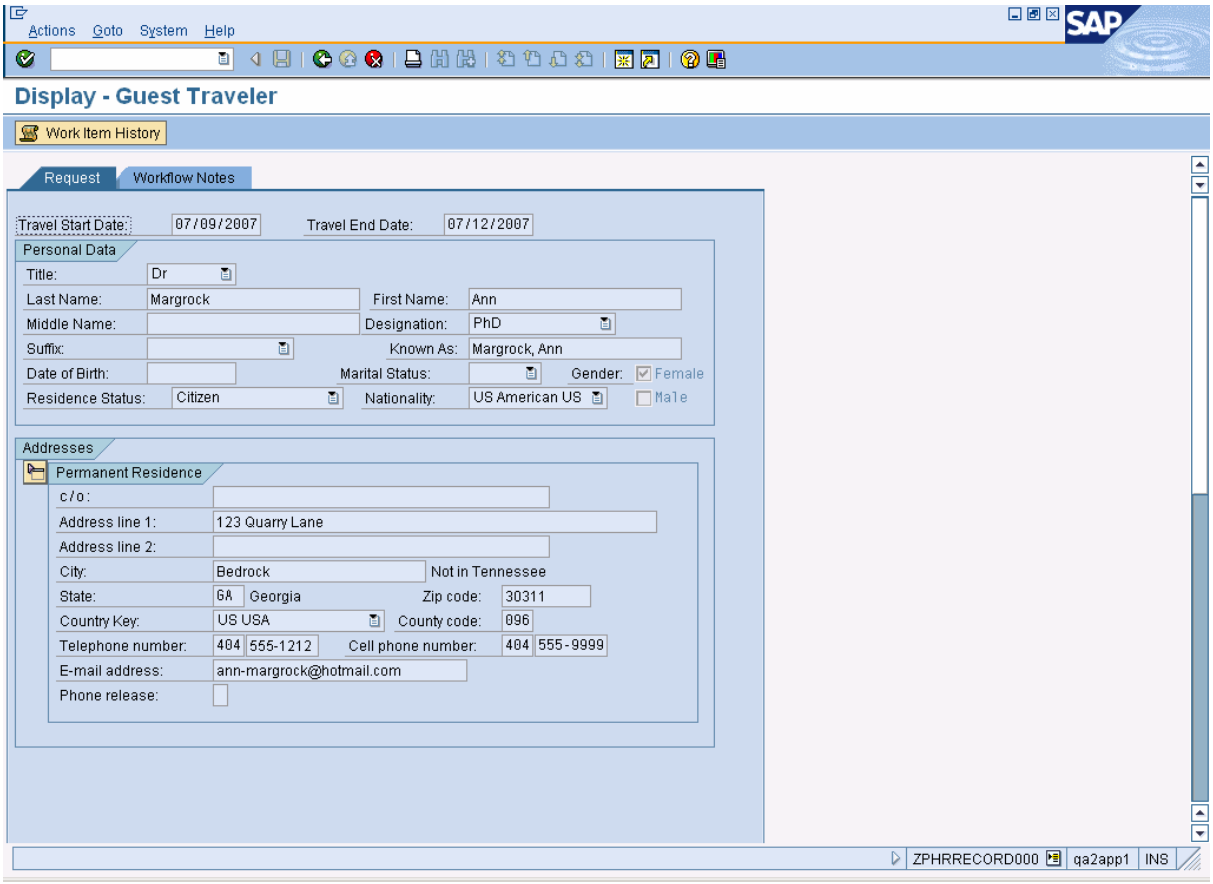
24. Click Work Item History if you wish to see who has the item in workflow. In this example, the item is ready for approval by Neal Wormsley.

Workflow History by Object Report



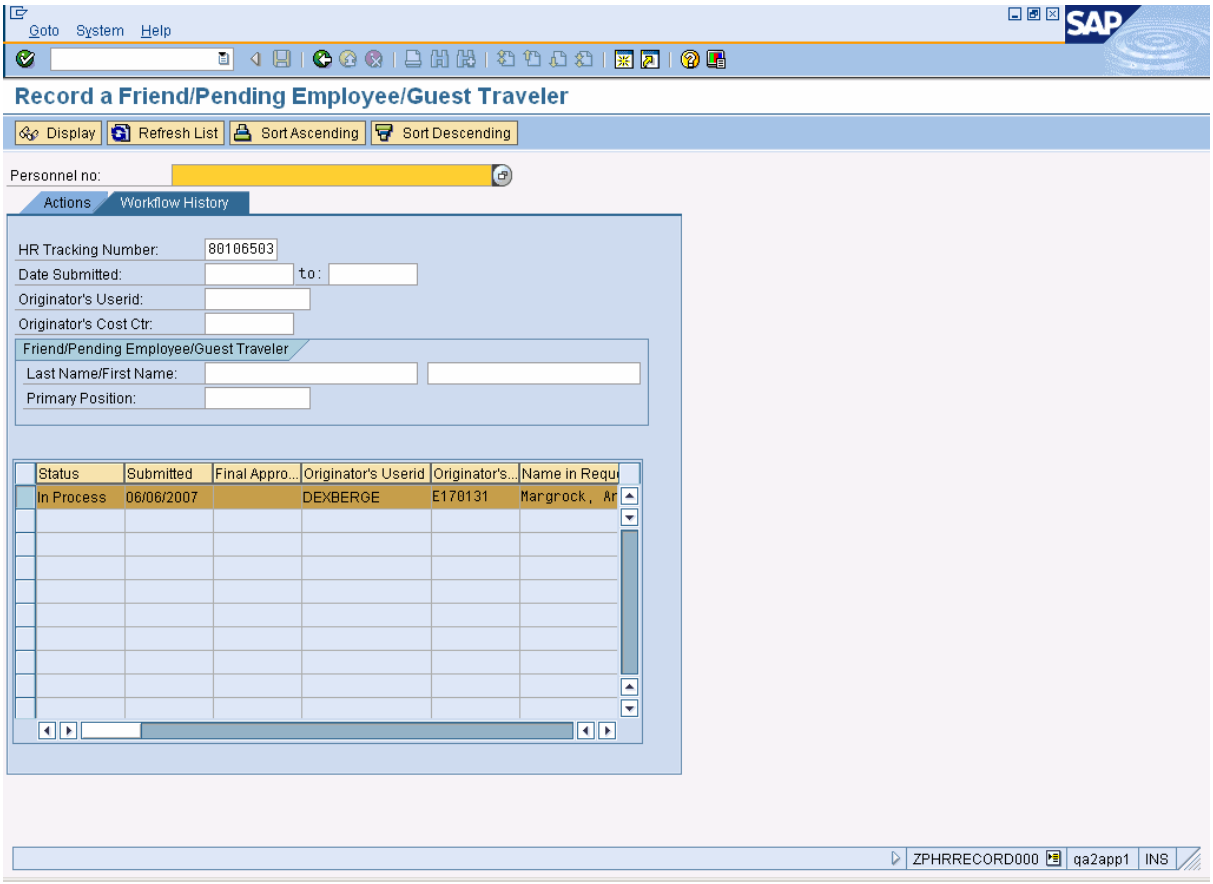
25. Click **(Back)** to return to the *Display – Guest Traveler* screen.

Display - Guest Traveler



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

Record a Friend/Pending Employee/Guest Traveler



27. Click **(Back)** to return to the menu.

28. You have completed this transaction.

Result

You have successfully requested that a guest traveler be created in IRIS.

Next Steps

- FYI messages for the request will be sent to the originator's e-mail address. The final approval FYI Message will contain the person's personnel number.

If you have printed the request, you may wish to record the *Personnel Number* on the blank line at the top of the report.

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.