



# Employee Self Service In County Travel Expense Employee Help Guide

## Contents

Accessing ESS .....	2
Navigating to Enter Travel Expenses.....	3
Create Expense Report .....	4
Mileage Details Screen.....	5
Add Scanned Receipts .....	6
Add attachment .....	7
Review and Submit Travel Request.....	7
Expense Form Example.....	10
Review your Trips and Expenses.....	11
Display/Change Submitted Report.....	12

Employee Self Service (ESS) is an online application that allows employees to view and change personal information. ESS provides access to Human Resource, Payroll, Benefits and Accounts Payable information online through the DCPS intranet (DCPS network).

## Accessing ESS

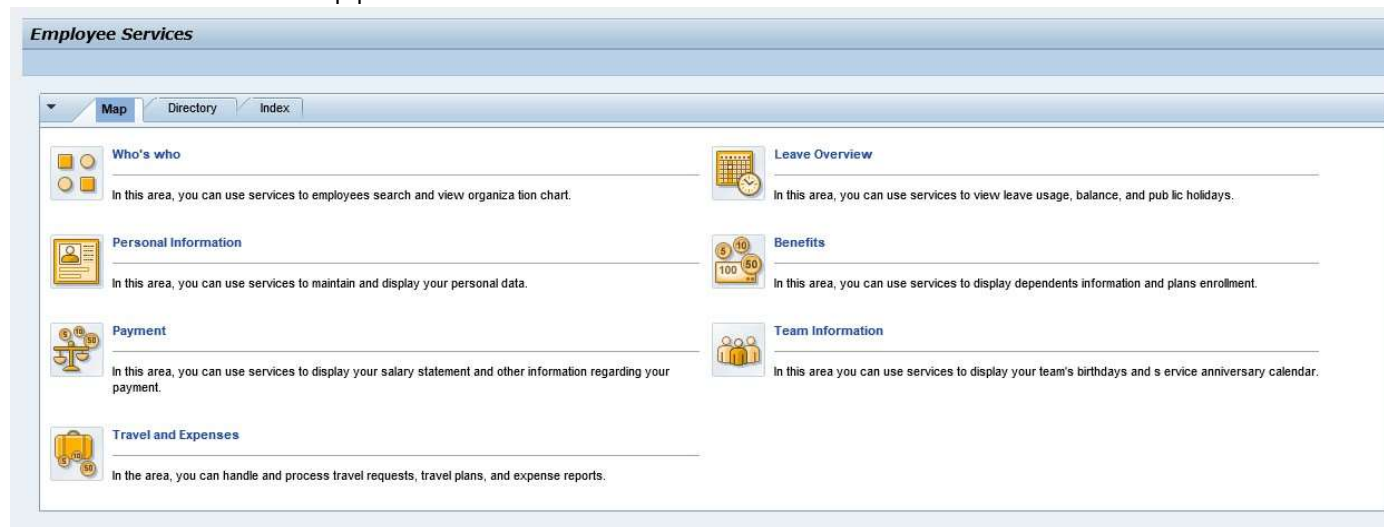
Using **Google Chrome** type **ess** in the address bar and press enter.



When the log on screen appears, login using your **network** user ID and password. Click the Log On button.

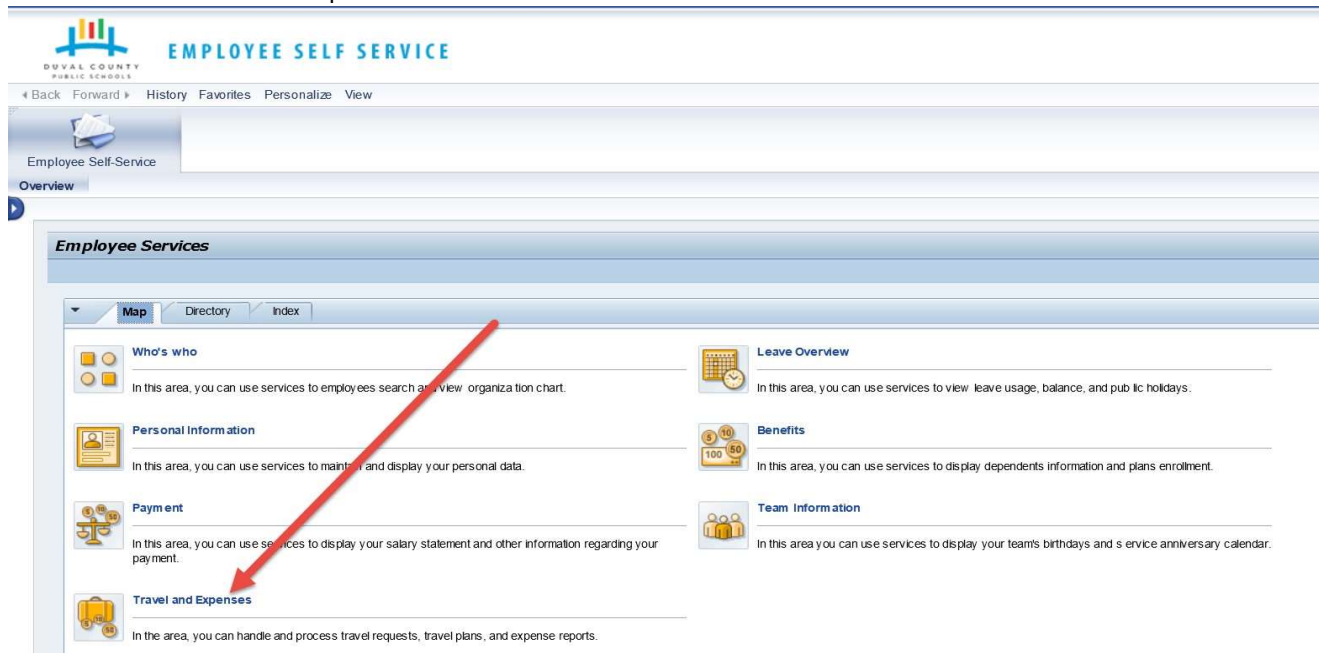


The main menu will appear:

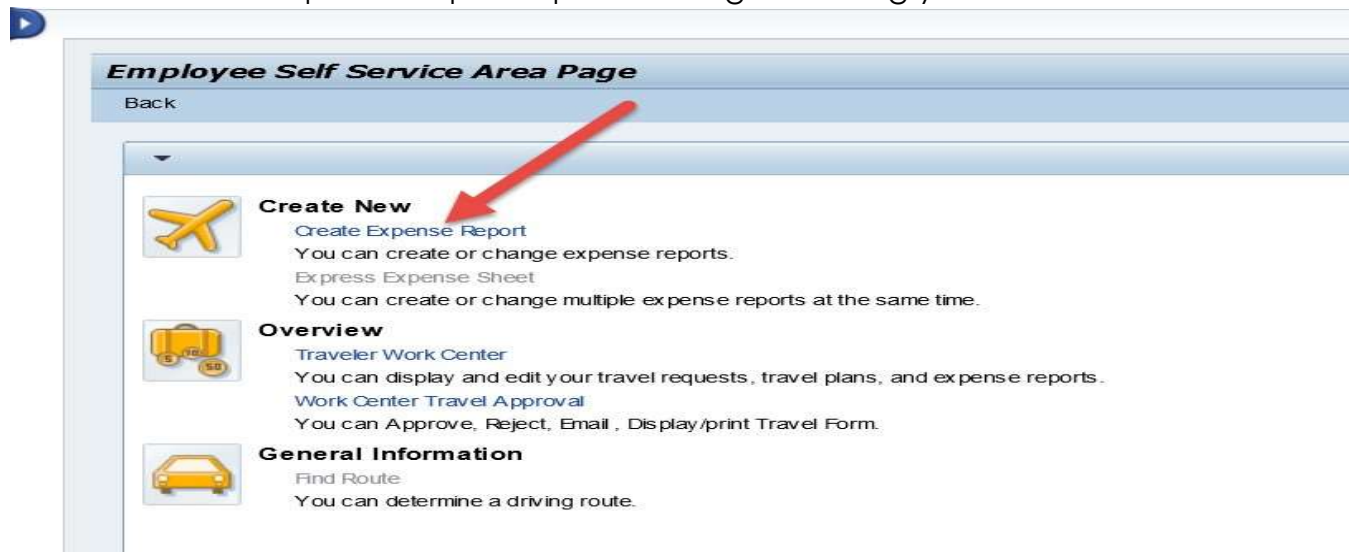


## Navigating to Enter Travel Expenses

Click on 'Travel and Expenses'.

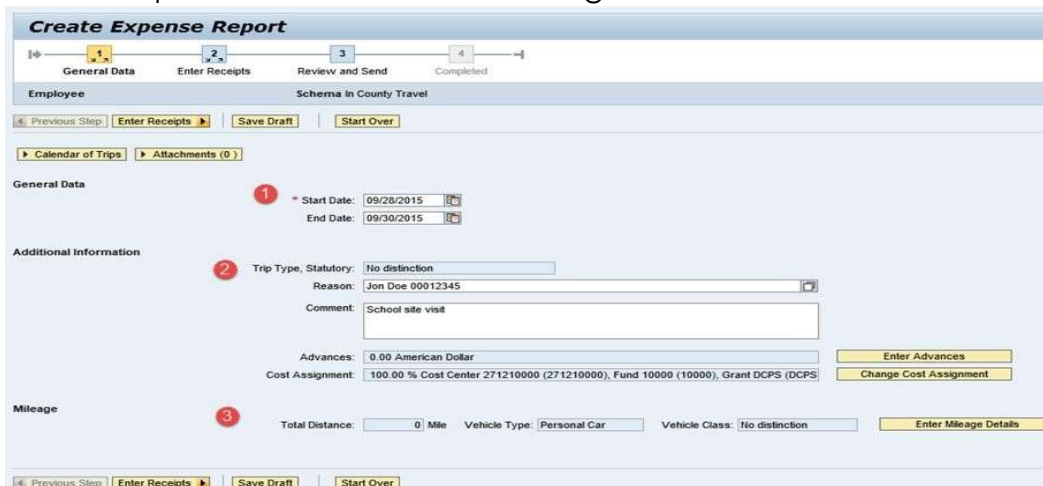


Select 'Create Expense Report' option to begin entering your travel information.



## Create Expense Report

Fill in the requested areas in the following order:



The screenshot shows the 'Create Expense Report' form with a progress bar at the top indicating four steps: 1. General Data, 2. Enter Receipts, 3. Review and Send, and 4. Completed. The form is currently on the 'General Data' step. The 'Employee' section shows 'Schema In County Travel'. Below this are buttons for 'Previous Step', 'Enter Receipts', 'Save Draft', and 'Start Over'. The 'General Data' section includes fields for 'Start Date' (09/28/2015) and 'End Date' (09/30/2015). The 'Additional Information' section includes fields for 'Trip Type, Statutory' (No distinction), 'Reason' (Jon Doe 00012345), 'Comment' (School site visit), 'Advances' (0.00 American Dollar), and 'Cost Assignment' (100.00 % Cost Center 271210000 (271210000), Fund 10000 (10000), Grant DCPS (DCPS)). There are buttons for 'Enter Advances' and 'Change Cost Assignment'. The 'Mileage' section includes fields for 'Total Distance' (0 Mile), 'Vehicle Type' (Personal Car), and 'Vehicle Class' (No distinction), with a button for 'Enter Mileage Details'.

1. General Data: Put in the start date and end date for the duration of your travels for your expense report.



This close-up shows the 'General Data' section with the 'Start Date' field set to 09/28/2015 and the 'End Date' field set to 09/30/2015. Both fields have calendar icons to the right.

2. Additional Information:
  - a. Trip Type: 'No distinction'.
  - b. Reason: In this section, list your name and 8-digit personnel number.
  - c. Comment: Provide a description of your travel.
  - d. Advances: If you were paid any funds in advance put that amount in the box.
  - e. Cost Assignment: The cost center defaults based on the Employee's department/RC assignment.
  - f. If you are doing alternate work, you will need to complete a separate report and change the cost center for those dates in a separate expense report.



This close-up shows the 'Additional Information' section with the following fields: 'Trip Type, Statutory' (No distinction), 'Reason' (Jon Doe 00012345), 'Comment' (School site visit), 'Advances' (0.00 American Dollar), and 'Cost Assignment' (100.00 % Cost Center 271210000 (271210000), Fund 10000 (10000), Grant DCPS (DCPS)). There are buttons for 'Enter Advances' and 'Change Cost Assignment'.

### 3. Mileage:

a. This area will reflect your mileage after you enter details.

**Mileage**

Total Distance:  Mile Vehicle Type:  Vehicle Class:

b. Click on 'Enter  
directed to the

**Enter Mileage Details**

Mileage Details' you will then be  
Mileage Details screen.

## Mileage Details Screen

Complete this report to reference your trip/mileage.

**Create Expense Report**

1 General Data 2 Mileage Details 3 General Data 4 Enter Receipts 5 Review and Send 6 Completed

Employee: Schema In County Travel Start Date: 09/28/2015 End Date: 09/30/2015

4 Previous Step: **Accept** Save Draft Start Over

Calendar of Trips

Total Distance Driven:  Mile

**Mileage Details**

New Entry Copy Delete

3 Date	4 Miles Driven	Passengers	Start Location	End Location
09/28/2015	8	No passengers	JACKSONVILLE 3001-1701 PRUDENTIAL DR	JACKSONVILLE 3012 - 2801 HERSCHEL ST
09/28/2015	4	No passengers	JACKSONVILLE 3001-1701 PRUDENTIAL DR	JACKSONVILLE 3015 - 3750 SPRINGFIELD BLVD
09/28/2015	6	No passengers	JACKSONVILLE 3001-1701 PRUDENTIAL DR	JACKSONVILLE 3016 - 4010 BALTIC ST
09/28/2015	0	No passengers		

1 Departure:  Add Change Find Predefined Address

2 Arrival:  Add Change Find Predefined Address

Vehicle Class:  Vehicle Type:

Comment:

5 **Accept** Accept and New Entry Copy Delete

6 Previous Step: **Accept** Save Draft Start Over

**Enter New Address**

\* Country / Region:

\* City / Postal Code:

Street Address:

OK Cancel

1. Departure: The preferred function is to use 'Find Predefined Address' link to select the location of the school or district building which you will be departing. Only use the add/enter a new address feature if the address is not in the predefined list.
2. Arrival: The preferred function is to use 'Find Predefined Address' link to select the location of the school or district building which you will be arriving. Only use the add/enter a new address feature if the address is not in the predefined list.
3. Edit the date, if needed.
4. Miles Driven: Determine the mileage from the departure point to the arrival point. Then input the mileage in the 'Miles Driven' column. If your mileage includes a decimal you

will have to round your number up or down depending on the number after the decimal. (ie: 5.5 would round up to 6. 5.4 would round down to 5)

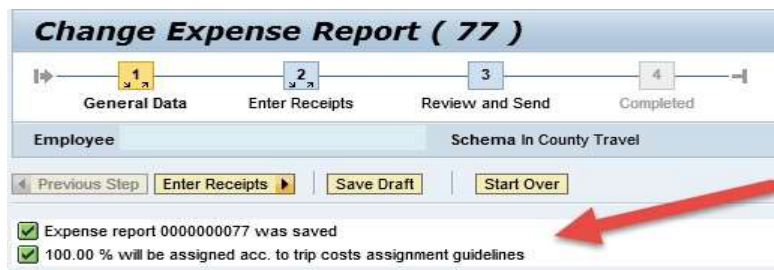
5. Accept and New Entry: Click 'Accept and New Entry' to begin entering an additional entry to your travel.
6. Accept: Once fields are complete, click on 'Accept' to save changes and return to the Create Expense Report screen.

\*\*When using the 'Find Predefined Address' function, there are two ways you can search. One way is by using the RC number, for example type in the Name box: **RC#\***. The other way is by using the school name, for example type in the Name box: **\*school name**. Be sure to put the entire school name in the listing with the asterisk in front, otherwise it will not populate. Then click search.



## Add Scanned Receipts

Click on Save Draft at the top of the screen.

You will receive a message at the top of your screen referencing the report being saved.

Your Create Receipts Screen has now converted to Change Expense Report



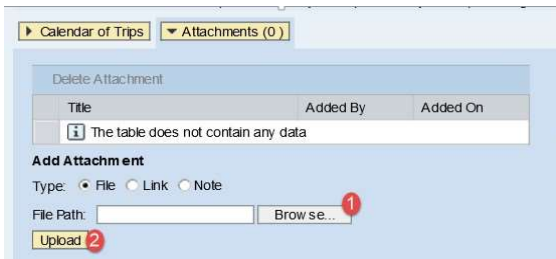
## Add attachment

Click on the Attachments button at the top left side of the Change Expense Report Screen.

You can enter the data that is required to settle your expenses. If you adopted the general data from a travel request or travel plan, you can complete the trip data where necessary. You can attach files, internet addresses, or notes by choosing Attachments.



This will open the Attachment box. Click on Browse, find your document and then click upload.



The document name can now be seen in the Title Field.

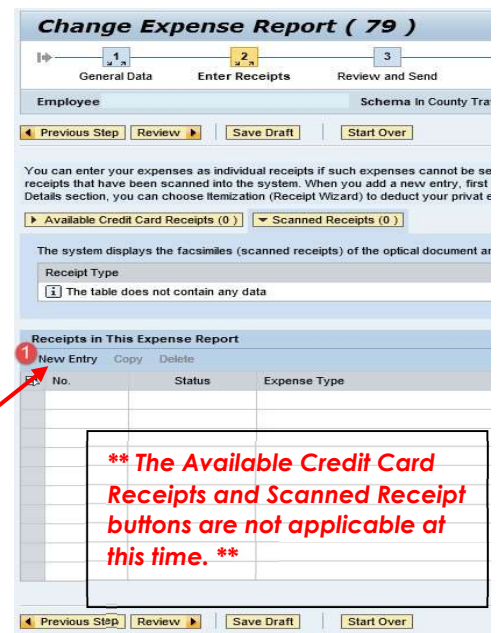


## Review and Submit Travel Request

Click on Enter Receipts (Step 2), at the top of the Change Expense Report screen.

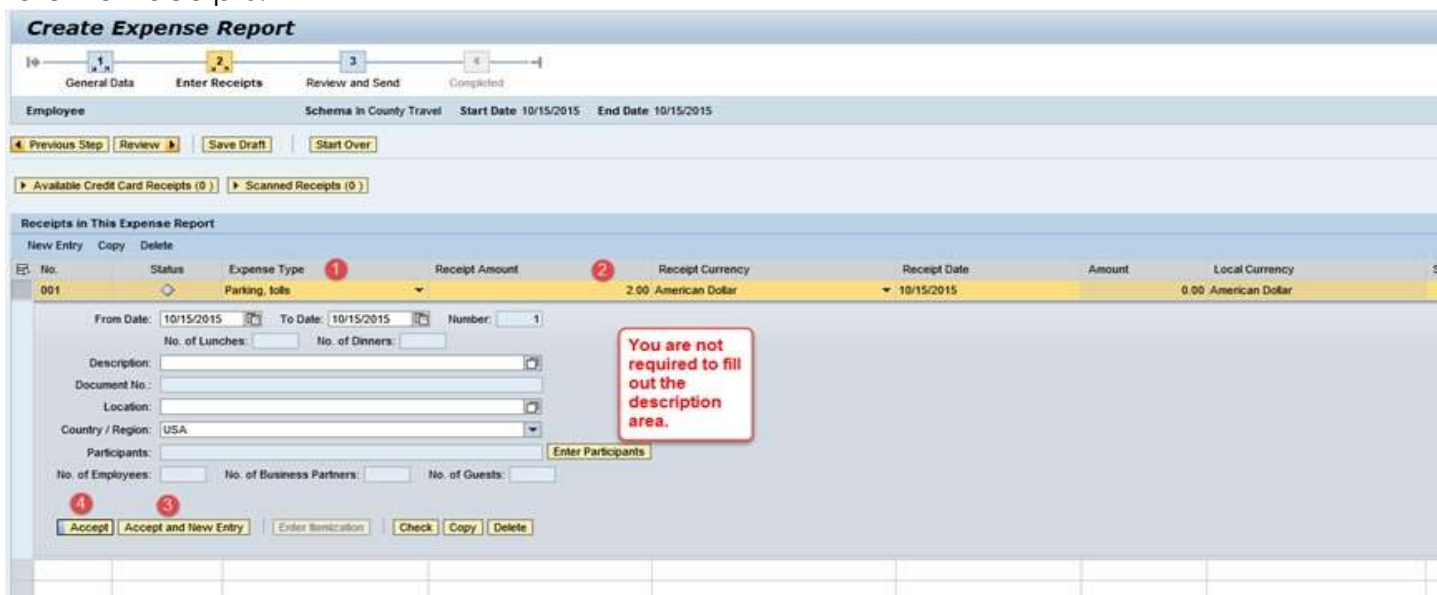


Click on 'New Entry'. This is where you will enter parking expenses.

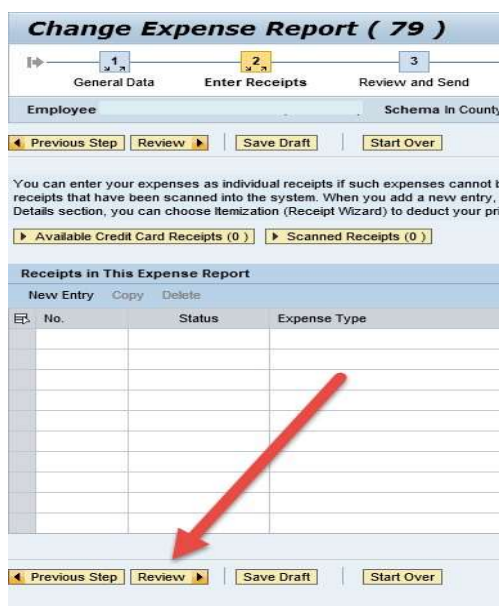


**\*\* The Available Credit Card Receipts and Scanned Receipt buttons are not applicable at this time. \*\***

To enter receipts:



1. Expense Type: Choose '**Parking, tolls**' (currently this is the only option to use).
2. Receipt Amount: Enter the amount of the receipt.
3. Accept and New Entry: If additional receipts need to be added, click the 'Accept and New Entry' button.
4. Accept: Click 'Accept' if all entries are complete.



At the bottom of the Change Expense Report screen select **Review**.

You now have the option to either save the document as a Draft or Send for Approval.



## Change Expense Report ( 41 )

1

2

3

4

General Data

Enter Receipts

Review and Send

Completed

Employee
Schema In County Travel
Start Date 09/28/2015
End Date 09/30/2015

◀ Previous Step
Save Draft
Start Over

### Final Action

☒ Save Draft

☐ Save and Send for Approval

I only want to save my expense report and send it later

I want to save my expense report and send it now for further processing

I confirm that all expenses were incurred by and on behalf of the company

### Summary

Total Mileage	10.35 USD
Total Individual Receipts	2.00 USD
<b>Total Travel Expenses</b>	<b>12.35 USD</b>
Amount Reimbursed	12.35 USD
Amount Paid Out	12.35 USD

### Cost Assignment


12.35 USD Company Code 0016 (Duval County Public Schoo), Cost Center 271210000 (271210000), Fund 10000 (10000), Grant DC

Display Expense Form

◀ Previous Step
Save Draft
Start Over

View and print your Expense Report Statement by clicking on Display Expense Form.

## Expense Form Example



0000000041\*

Jon Doe 00012345  
Administrator  
12 mo Admin

Duval County Duval County Public  
1701 Prudential Dr  
Jacksonville 32224  
Date: Oct 15, 2015  
Page: 1 / 2

### Expense Report/Travel Expense Statement (Simulation)

For: Jon Doe 00012345 For Trip: 41 From: Sep 28, 2015 To: Sep 30, 2015

General Data	
Reason:	Jon Doe 00012345
Trip Activity Type:	In County Travel
Trip Type - Statutory:	No distinction
Trip Type - Enterprise-specific:	Standard trip

Settlement Results and Cost Assignment	
Amount Type	Amount (USD)
Travel Flat Rates	10.35
Sum of Receipts to be Reimbursed	2.00
<b>Reimbursement Amount</b>	<b>12.35</b>

12.35 USD of 12.35 USD assigned to:

Company Code:	0016	Duval County Public School
Cost Center:	271210000	
Funds Center:	2712	Tech Program Mgmt
Fund:	10000	
Functional Area:	6500	Instruction Related Tech
Grant:	DCPS	DCPS-DEFAULT GRANT


**Be sure to verify this area before submitting your travel/expense report!**

Additional Trip Information		
School site visit		

Travel Flat Rate		
Date	km/ mi	Flat Rate
9/28/15	8 Personal Car, No distinction	4.50
9/28/15	4 Personal Car, No distinction	2.30

I hereby certify or affirm that this travel claim is true and correct in every material matter, that the expenditures were actually incurred by the undersigned as necessary travel expenditures in the performance of my official duties, and that same conforms in every respect with the requirements of Chapter 100, Part 7, of the Municipal Code of the City of Jacksonville and/or Duval County School Board. By submitting this form, I acknowledge that I will be receiving my reimbursements electronically into my financial account of record. If I am not entitled to funds deposited into my account, I authorize the reversal of these funds. I authorize the Duval County School Board to deduct from my future payroll or subsequent travel entitlement, an amount equal to any purchases I make with the Duval County Purchasing Card that are not allowable, including sales tax and parking fees.

When reviewing the Expense Report, **be sure to verify the cost assignment area** is correct before submitting. Once you have reviewed, go back to the 'Change Expense Report' screen. When you get there choose to either; 'Save Draft' or



Report/Trip: 41  
Personnel number:

Page: 2 / 2

Date	km/ mi	Flat Rate	Reimbursement Amount (USD)
9/28/15	6 Personal Car, No distinction		3.45
<b>Reimbursement Amount:</b>			<b>10.35 USD</b>

Trip Segment		
September 28, 2015	Total Mileage (mi/km)	8
From: JACKSONVILLE 3001-1701 PRUDENTIAL DR	To: JACKSONVILLE 3012 - 2601 HERSCHEL ST	
Consumption: 0	Currency:	
Km/Miles: 8		
Vehicle Type: C		
September 28, 2015	Total Mileage (mi/km)	4
From: JACKSONVILLE 3001-1701 PRUDENTIAL DR	To: JACKSONVILLE 3015 - 3750 SPRINGFIELD BLVD	
Consumption: 0	Currency:	
Km/Miles: 4		
Vehicle Type: C		
September 28, 2015	Total Mileage (mi/km)	6
From: JACKSONVILLE 3001-1701 PRUDENTIAL DR	To: JACKSONVILLE 3016 - 4010 BALTIC ST	
Consumption: 0	Currency:	
Km/Miles: 6		
Vehicle Type: C		

Receipts		
Date	No.	Expense Type
9/28/15	001	Parking, tolls
		<b>Sum of Receipts</b>
		<b>2.00</b>
<b>Reimbursement Amount:</b>		<b>2.00 USD</b>


Additional Receipt Information			
No.	Receipt	Type	Content
001	Parking, tolls	From	09/28/2015
		To	09/30/2015
		Number	3

I hereby certify or affirm that this travel claim is true and correct in every material matter, that the expenditures were actually incurred by the undersigned as necessary travel expenditures in the performance of my official duties, and that same conforms in every respect with the requirements of Chapter 100, Part 7, of the Municipal Code of the City of Jacksonville and/or Duval County School Board. By submitting this form, I acknowledge that I will be receiving my reimbursements electronically into my financial account of record. If I am not entitled to funds deposited into my account, I authorize the reversal of these funds. I authorize the Duval County School Board to deduct from my future payroll or subsequent travel entitlement, an amount equal to any purchases I make with the Duval County Purchasing Card that are not allowable, including sales tax and parking fees.

## Review your Trips and Expenses

Employee Self Service Area Page

Back




Create New

[Create Expense Report](#)

You can create or change expense reports.

[Express Expense Sheet](#)

You can create or change multiple expense reports at the same time.




Overview

[Traveler Work Center](#)

You can display and edit your travel requests, travel plans, and expense reports.

[Work Center Travel Approval](#)

You can Approve, Reject, Email , Display/print Travel Form.



General Information

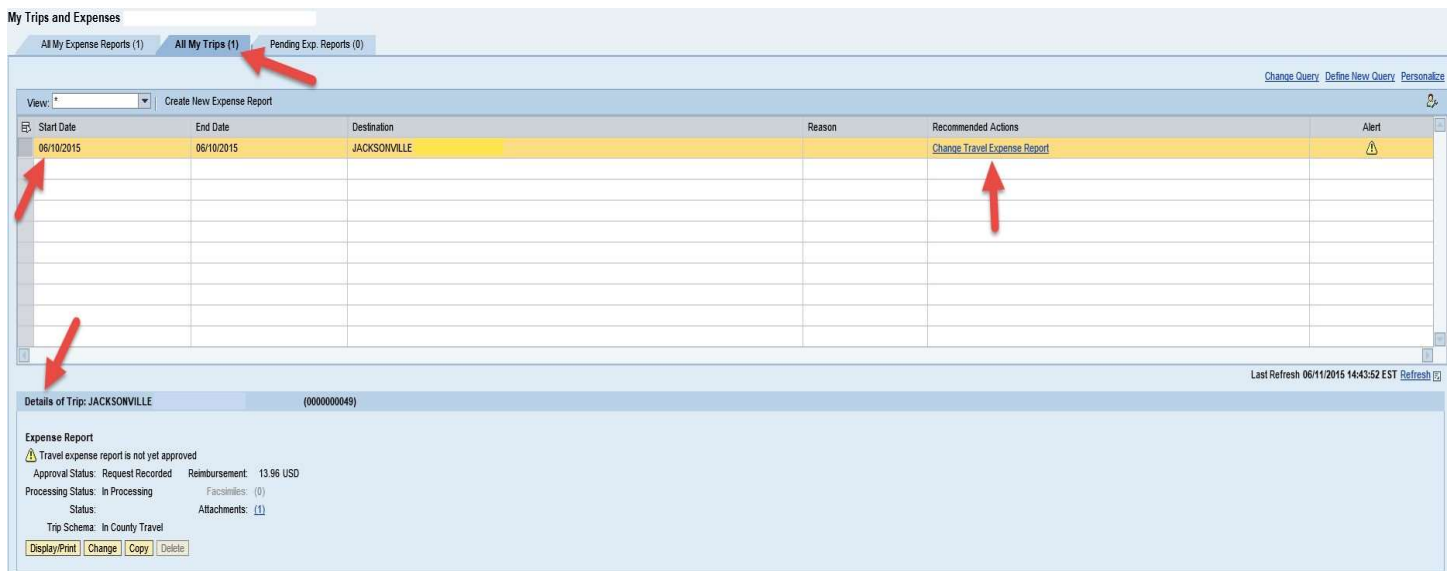
[Find Route](#)

You can determine a driving route.

[illegible]

## Display/Change Submitted Report

To display the details of the selected expense report, click the tab at the top of the screen **'All My Trips'**. Click on the line you wish to view and the detailed information will appear at the bottom of the screen. If there is a problem or an item needs to be adjusted, you will see a note in the **'Recommended Actions'**. Click on the link to read the recommendation. If a change, copy, or deletion on the submitted form are needed click the option **'Change Travel Expense Report'**.



My Trips and Expenses

All My Expense Reports (1) **All My Trips (1)** Pending Exp. Reports (0)

View: \* Create New Expense Report

Start Date	End Date	Destination	Reason	Recommended Actions	Alert
06/10/2015	06/10/2015	JACKSONVILLE		<a href="#">Change Travel Expense Report</a>	⚠

Details of Trip: JACKSONVILLE (0000000049)

Expense Report  
⚠ Travel expense report is not yet approved  
Approval Status: Request Recorded Reimbursement: 13.96 USD  
Processing Status: In Processing Facsimiles: (0)  
Status: Attachments: (1)  
Trip Schema: In County Travel

[Display/Print](#) [Change](#) [Copy](#) [Delete](#)

Last Refresh 06/11/2015 14:43:52 EST [Refresh](#)

If you wish to proceed with the recommendation the system will take you back into your request, to the screen where you can change the item in question.

