



CITY OF
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Creating an Expense Claim Estimate in Employee Self-Service (ESS)

City of Tulsa ERP Project Management Team

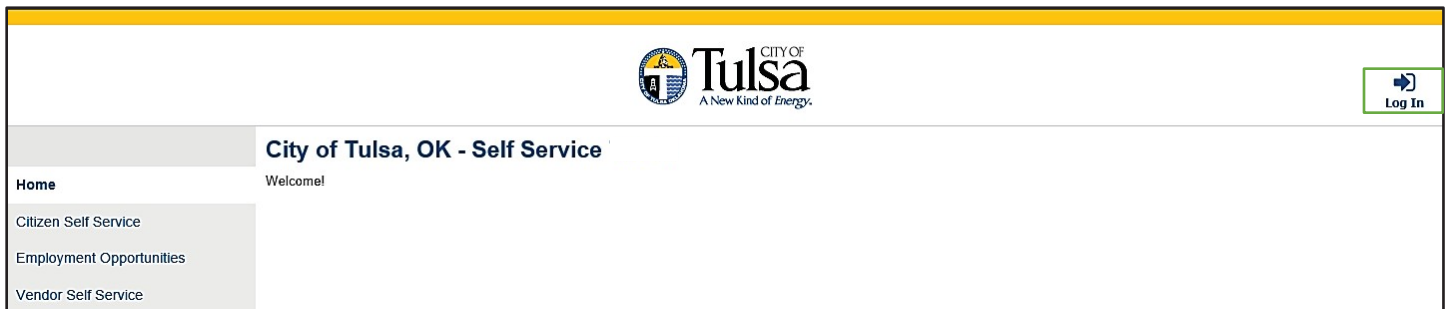
06/29/2018

Creating an Expense Claim Estimate in Employee Self-Service (ESS)

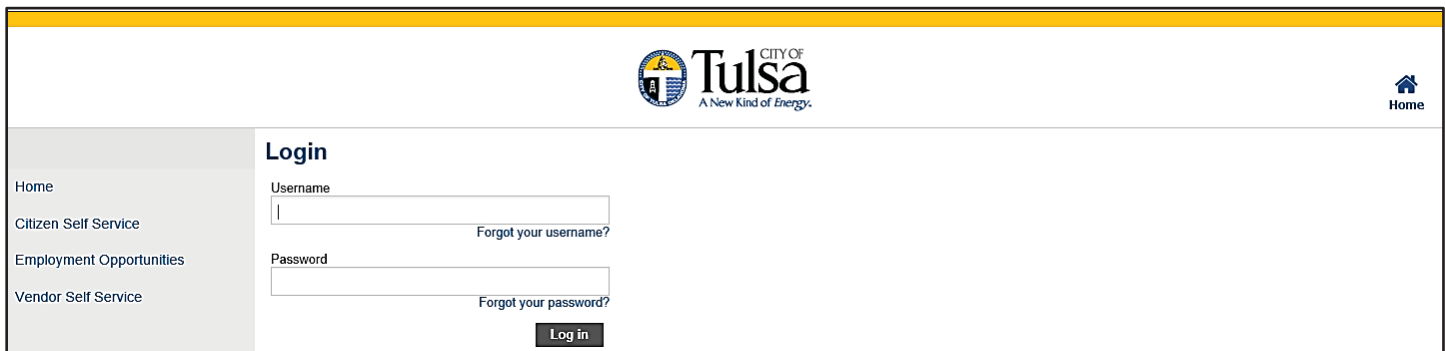
Important Information

You can submit an estimated claim without attachments. However, you must fill out all required fields on the Claim Details Screen and at least ONE expense amount and the location information from the Expenses and Receipts screen. Please submit AS MUCH information as possible.

1. Log in to ESS.



The screenshot shows the City of Tulsa Self-Service portal. At the top, there is a yellow header bar. Below it, the City of Tulsa logo is centered. To the right of the logo is a green button with a right arrow and the text "Log In". Below the header, the page title "City of Tulsa, OK - Self Service" is displayed. On the left, there is a sidebar with a "Home" link and three other links: "Citizen Self Service", "Employment Opportunities", and "Vendor Self Service". The main content area shows a "Welcome!" message.



The screenshot shows the City of Tulsa Self-Service portal login page. At the top, there is a yellow header bar. Below it, the City of Tulsa logo is centered. To the right of the logo is a blue "Home" button. Below the header, the page title "Login" is displayed. On the left, there is a sidebar with a "Home" link and three other links: "Citizen Self Service", "Employment Opportunities", and "Vendor Self Service". The main content area contains a login form with two input fields: "Username" and "Password". Below the "Username" field is a link "Forgot your username?". Below the "Password" field is a link "Forgot your password?". At the bottom of the form is a "Log in" button.


1. Select **Expense Reports** and Add Your Claim.





The image shows a vertical menu for 'Employee Self Service'. The menu items are: Employee Self Service, Certifications, Expense Reports (highlighted in white), Add claim (a button with a green border), Pay/Tax Information, Performance Evaluations, Personal Information, and Employment Opportunities.

3.

- a) Choose the Claim Type
- b) Department Name (e.g. Engineering, Finance, Water & Sewer etc.) **REQUIRED**
- c) Description (e.g. name of the conference, training, meeting etc.) **REQUIRED**
- d) Event: *If the Event is not listed please email: Employeee reimbursement@cityoftulsa.org* **REQUIRED**
- e) Start Date (day travel starts) **REQUIRED**
- f) End Date (day travel ends) **REQUIRED**
- g) Start time (Event)
- h) End time (Event)



 Resources
  MOORE, ANNA M

Employee Self Service

Certifications

Expense Reports

Add claim

Pay/Tax Information

Performance Evaluations

Personal Information

Employment Opportunities

Claim type

Department*

Description*

Event


Start date*



Start time
NOTE: Use HH:MM format. For example, use '08:30' for 8.30 am, '17:00' for 5 pm.

End date*

End time
NOTE: Use HH:MM format. For example, use '08:30' for 8.30 am, '17:00' for 5 pm.

4. Now enter more details for the Expense. If not known, you will still need to enter at least one expense amount, even if it's an estimated amount.



 Resources
  MOORE, ANNA M

Employee Self Service

Certifications

Expense Reports

Add claim

Edit details

Expenses & receipts

Pay/Tax Information

Performance Evaluations

Personal Information

Employment Opportunities

Expenses and receipts

[Unsaved claim](#) [Edit details](#)

Claim type	Travel Authorization - Training
Department	Finance
Description	Tyler Connect
Event	ICSC-International Council of Shopping Centers
Start date	Saturday, April 21, 2018
End date	Wednesday, April 25, 2018
Cash advance	\$0.00
Total amount claimed	\$0.00

☐ Location

☐ Unit expenses \$0.00

☐ Informational expenses

☐ Attach supporting documents

5. Enter Destination for City, State and Country.

☐ Location

Destination city*

Destination state*

Destination country* ×

6. Enter all Expenses related to the travel and upload documents supporting your estimates.

Unit expenses				\$2,645.00
				Add an expense
Expense	Comments	Date	Amount	
LODGING-OTHER	Hotel	4/20/2018	\$956.00	update delete
AIRFARE OTHER	Flight	4/20/2018	\$458.00	update delete
PERDMHIGH75-OTH	Partial Day Travel	4/20/2018	\$102.00	update delete
PERDIEMHIGH-OTH	Per Diem	4/20/2018	\$204.00	update delete
REGISTRATN-OTH	Conference Registration	2/26/2018	\$925.00	update delete

Expense information

Expense type: AIRFARE OTHER ⓘ

1 @ \$ 458.00 each = \$458.00

Cash advance: 0.00

Date incurred: 04/20/2018

Comments: Flight

[Save expense](#) [Cancel](#)

Expense information

Expense type: LODGING-OTHER ⓘ

4 @ \$ 239.00 each = \$956.00

Cash advance: 0.00

Date incurred: 04/20/2018

Comments: Hotel ⓘ

[Save expense](#) [Cancel](#)

Expense information

Expense type: REGISTRATN-OTH ⓘ

1 @ \$ 925.00 each = \$925.00

Cash advance: 0.00

Date incurred: 2/26/2018

Comments: Conference Registration


[Save expense](#) [Cancel](#)

Per Diem Expense Types:

To determine if you have a high or low Per Diem, access the Per Diem document under the Resources Tab in ESS. Certain locations listed in the document will be a PERDIEMHIGH of \$68. Anything not listed on the chart is a PERDIEMLOW of \$57.

In order to receive your Per Diem prior to traveling it must be submitted and approved at least 8 days prior to the payroll before you leave.

7. Attach all supporting documents/estimates to the Claim.

 Attach supporting documents

Concur Itinerary 04_21_2018_ TRIP FROM TULSA TO BOSTON (YROQVH) Ellen.pdf [Remove](#)

Ellen Conference Registration.pdf [Remove](#)

hotel Ellen.pdf [Remove](#)

Attachments: [Browse...](#)

8. Review the Claim and Submit.

[Review](#)
[Save For Later](#)
[Cancel](#)

Verify Expenses

Claim details				
Comments	Tyler Conference			
Claim type	Travel Authorization - Other			
Status	Entering			
Department	Finance			
Start date	Friday, April 20, 2018			
End date	Wednesday, April 25, 2018			
Destination city	Boston			
Destination state	MA			
Destination country	United States			
Cash advance	\$308.00			
Amount claimed	\$2,645.00			

Per unit expenses				
	Date	Comments	Cash advance	Amount claimed
LODGING-OTHER	4/20/2018	Hotel	0.00	856.00
AIRFARE OTHER	4/20/2018	Flight	0.00	458.00
PERDMMHIGH5-OTH	4/20/2018	Partial Day Travel	102.00	102.00
PERDIEMHIGH-OTH	4/20/2018	Per Diem	204.00	204.00
REGISTRATN-OTH	2/26/2018	Conference Registration	0.00	925.00
			\$308.00	\$2,645.00

Attached documents

Concur Itinerary 04_21_2018_ TRIP FROM TULSA TO BOSTON (YROQVH) Ellen.pdf

Ellen Conference Registration.pdf



hotel Ellen.pdf

hotel Ellen.pdf

[Submit Claim](#)

9. Once you have submitted your claim, you will receive a claim number.

Confirmation

 Your claim, number 50, was successfully submitted. 

Thank you for using ESS!

If you have any additional questions regarding your travel, please contact your department travel coordinator.