

Travel Manual
Travel Approver Setup (Departmental Approvers)

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Travel

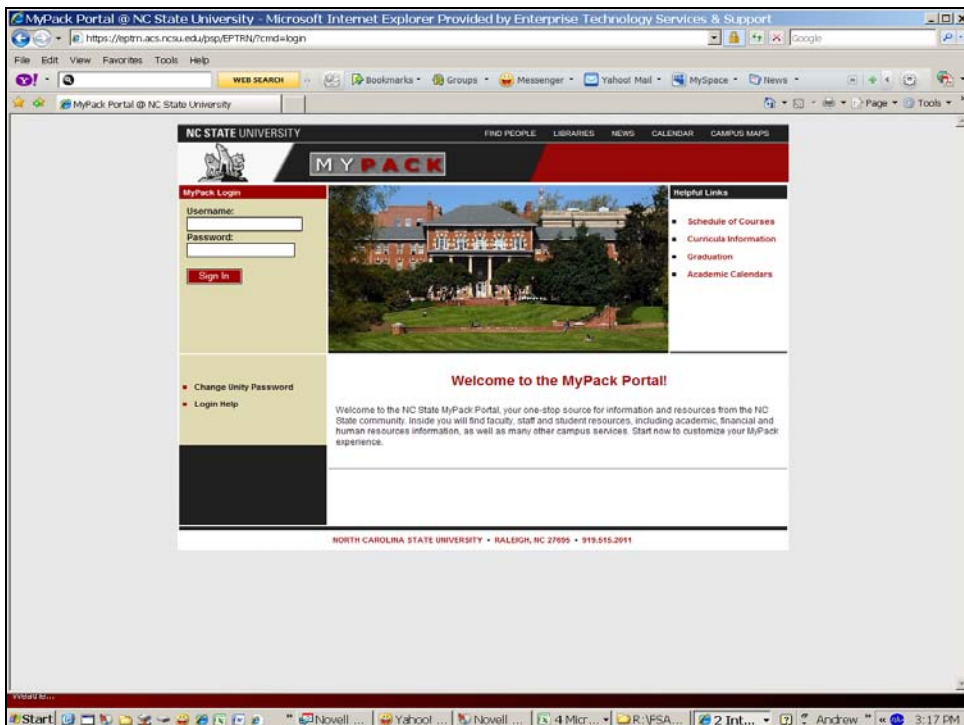
Travel Approval Setup

Procedure


Access is VERY LIMITED for select College and Departmental Accounting personnel only. You must have Security Access (SAR) previously established to complete this process.

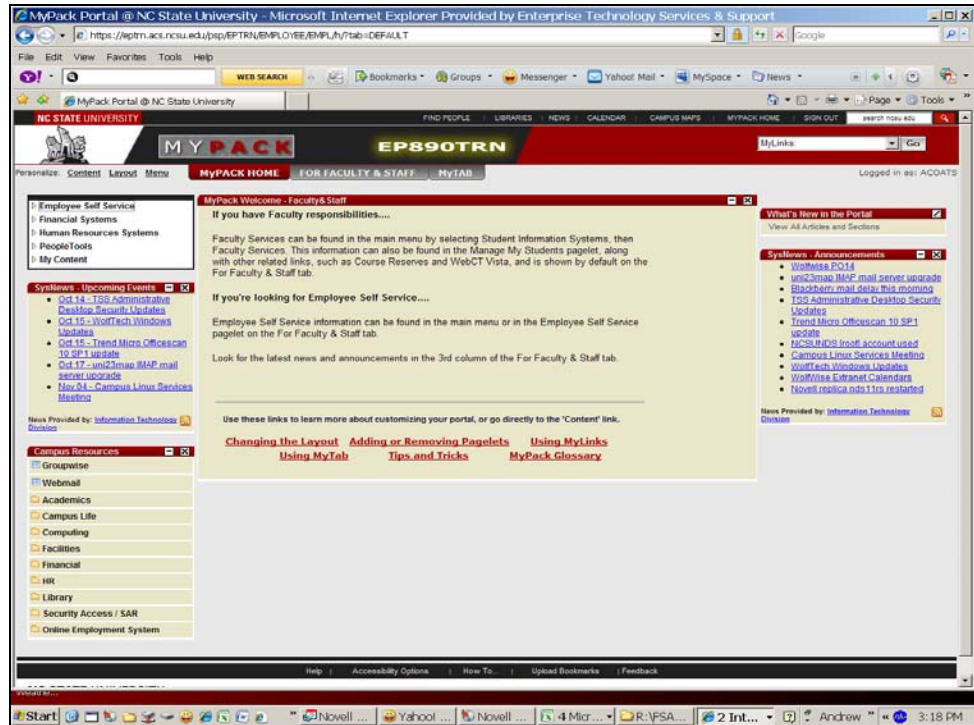
Travel Approver Setup is not necessary for individuals (faculty, staff, & grad students paid through HR) who do not travel.



Employees who want to create a travel authorization should skip this topic and begin with "**Traveler Profile**" and "**Create Travel Authorization**" topics.

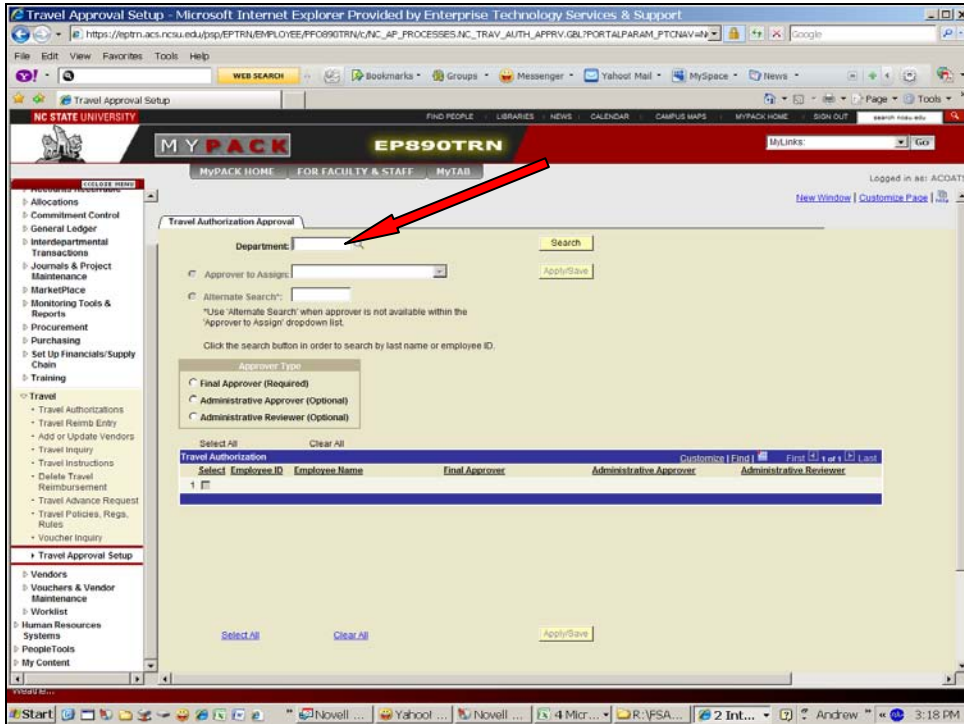



Step	Action
1.	Beginning a new Portal session requires you to enter your Username & Password information.

Step	Action
2.	Click the Sign In button. 



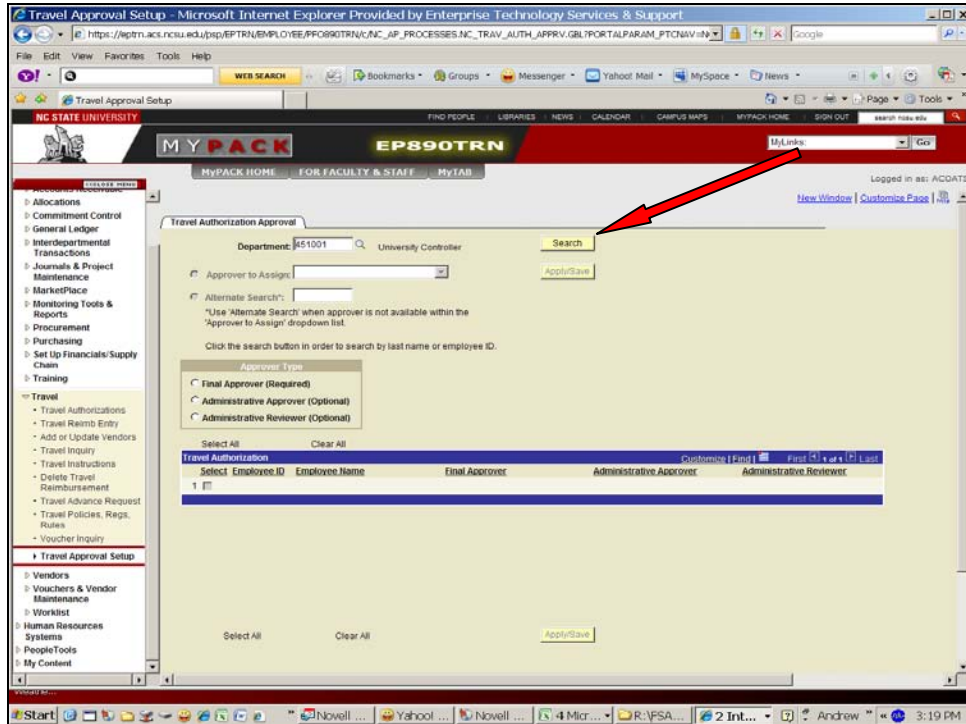
Step	Action
3.	Click the For Faculty & Staff link. 
4.	Click the Travel link. 
5.	Click the Travel Approval Setup button. You only see this pagelet, IF you have been given Security Access.

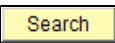

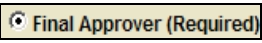



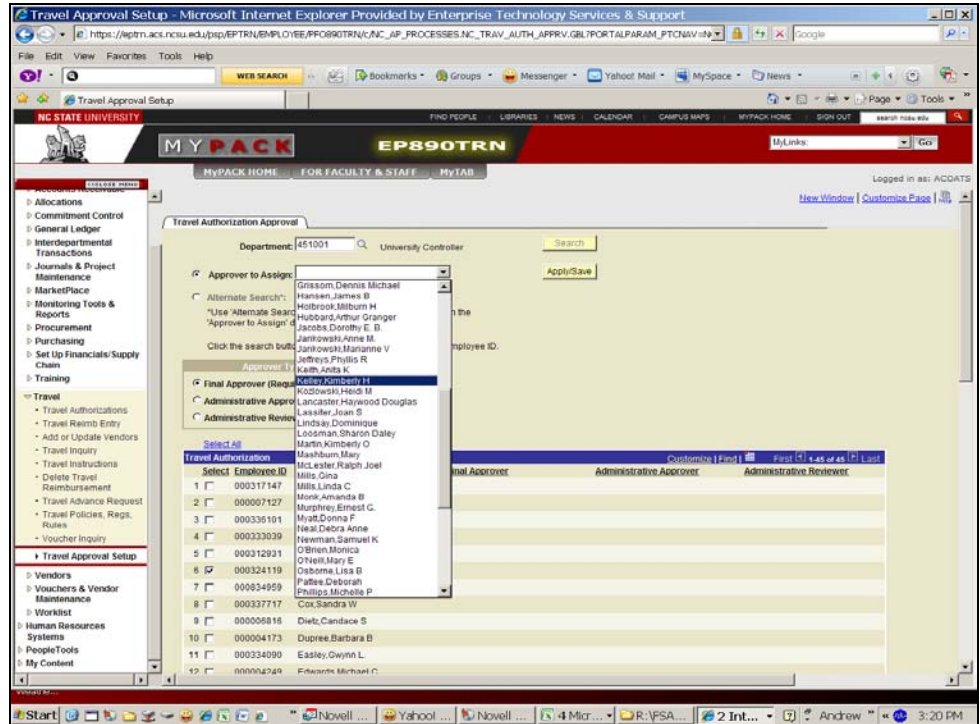
Step	Action
6.	Enter your "OUC / Department #" into the Department field.
7.	In this example, we will search on the 2-digit OUC / Dept. number, and click the Look up Department button. 



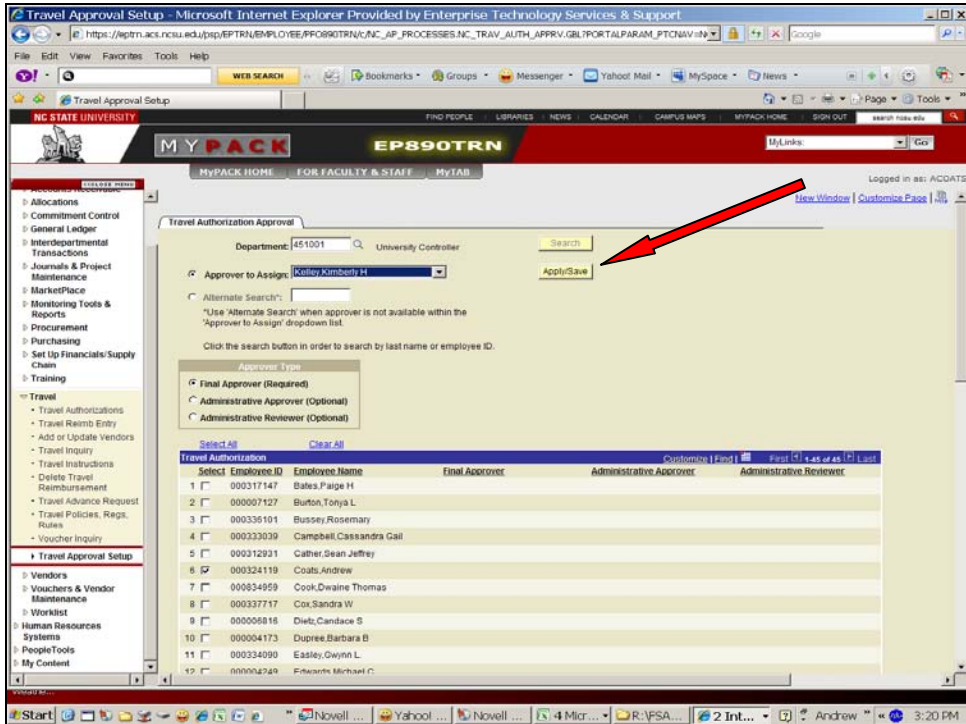
Step	Action
8.	<p>Always select "your" 6-digit department number for this search.</p> <p><u>451001</u> <u>University Controller</u></p>



Step	Action
9.	Click the Search button to pull in the employee information below. 
10.	Only employees who are assigned to the OUC / Dept # entered will populate below. Repeat search steps and process for additional OUC / Dept #'s you maintain responsibility.
11.	Select the employee(s) to assign an Approver. Click the Checkbox in the "Select" column for which you will assign their approver. 
12.	Make sure the Final Approver (Required) option is selected. 
13.	Click the Approver to Assign list. 

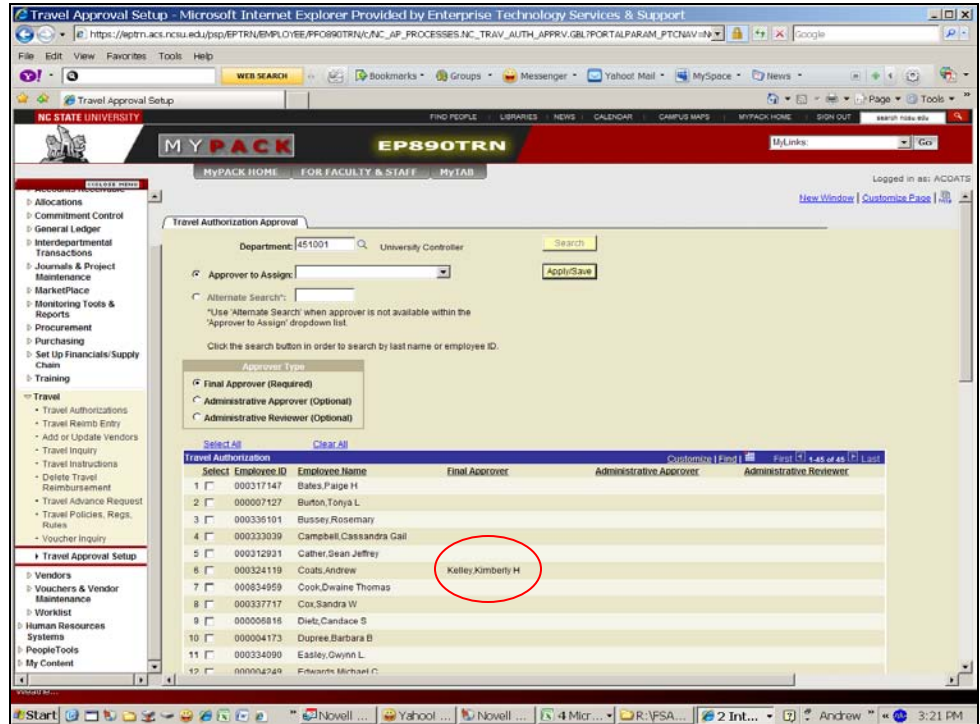


Step	Action
14.	Scroll down and select the department head for the “Final Approver”. In our example, we will select Kelley, Kimberly H from the listing. Kelley Kimberly H

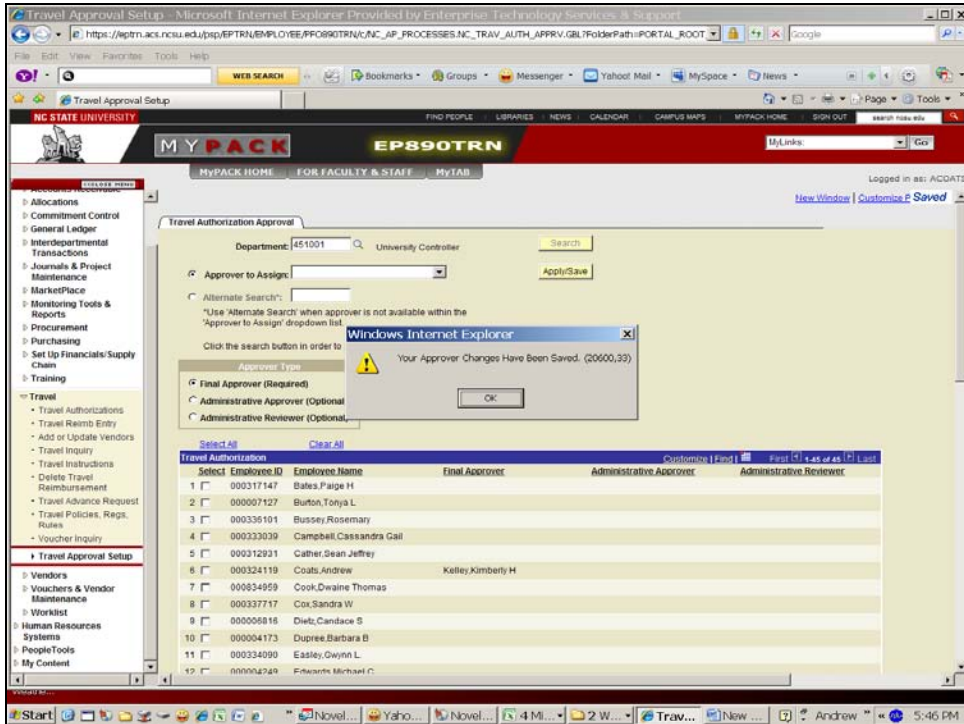



Step	Action
15.	Click the Apply/Save button.

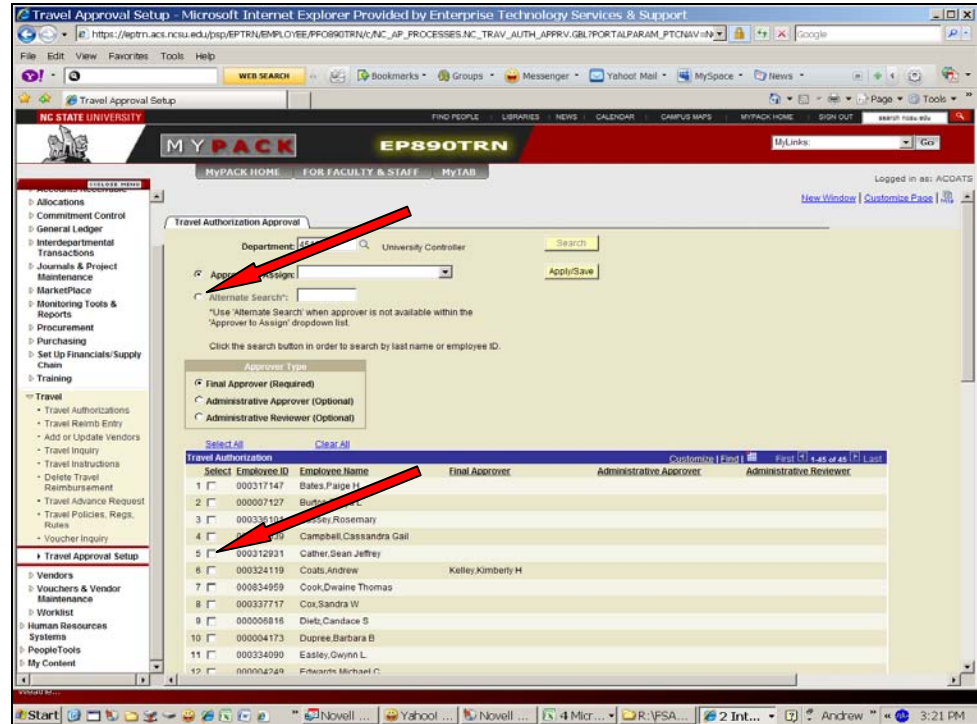
Apply/Save



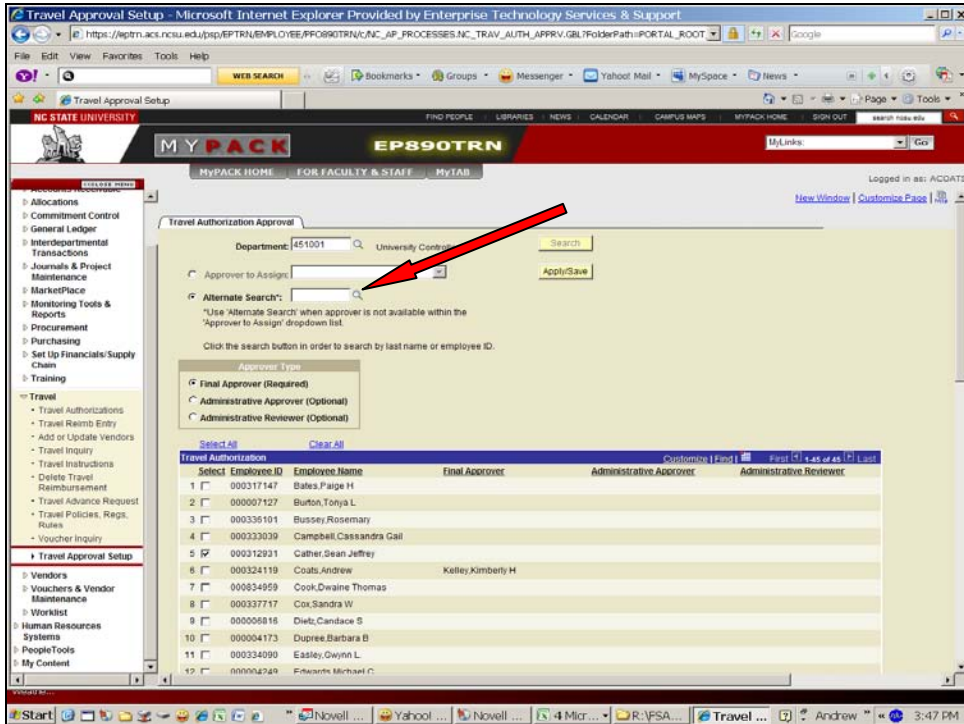
Step	Action
16.	Notice that "Final Approver" has been updated. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Kelley, Kimberly H</div>



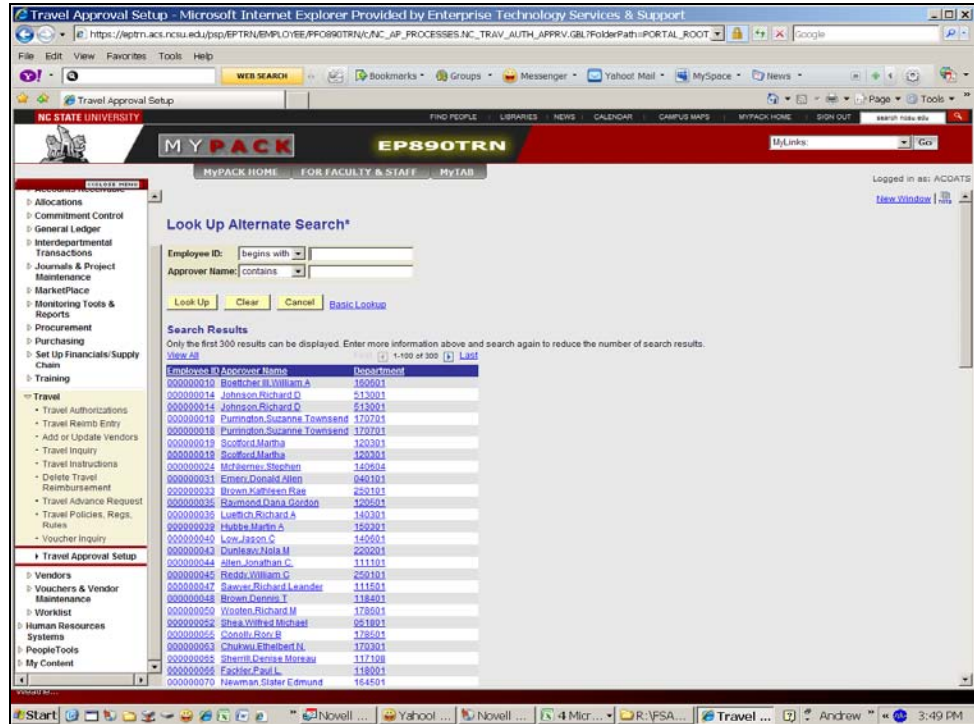
Step	Action
17.	Click the OK button. 
18.	If the Approver to Assign dropdown did not list the individual's name you need, select the Alternate Search method, as follows.

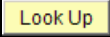



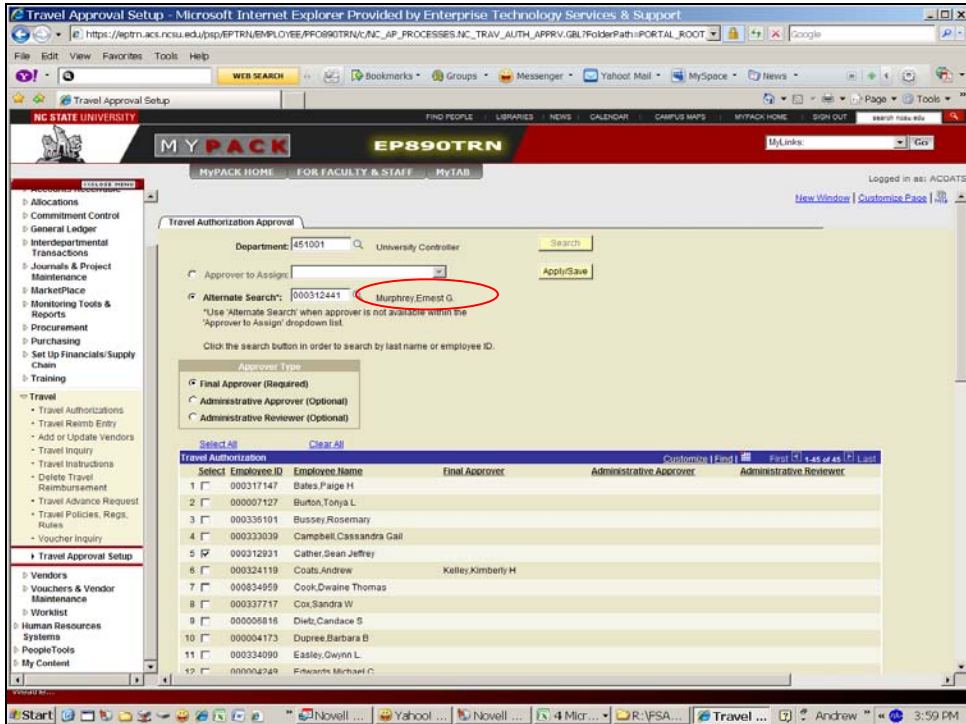
Step	Action
19.	Again, we select our employee to assign a "Final Approver" by checking the checkbox beside their name – Sean Cather will be selected. <input checked="" type="checkbox"/> 000312931 Cather,Sean Jeffrey
20.	In this example, we could not locate an approver from the drop-down " Approver to Assign " from Department number selected. So, we click the Radio Button " Alternate Search " when approved needed is outside of the department. <input type="radio"/> Approver to Assign: <input type="text"/>



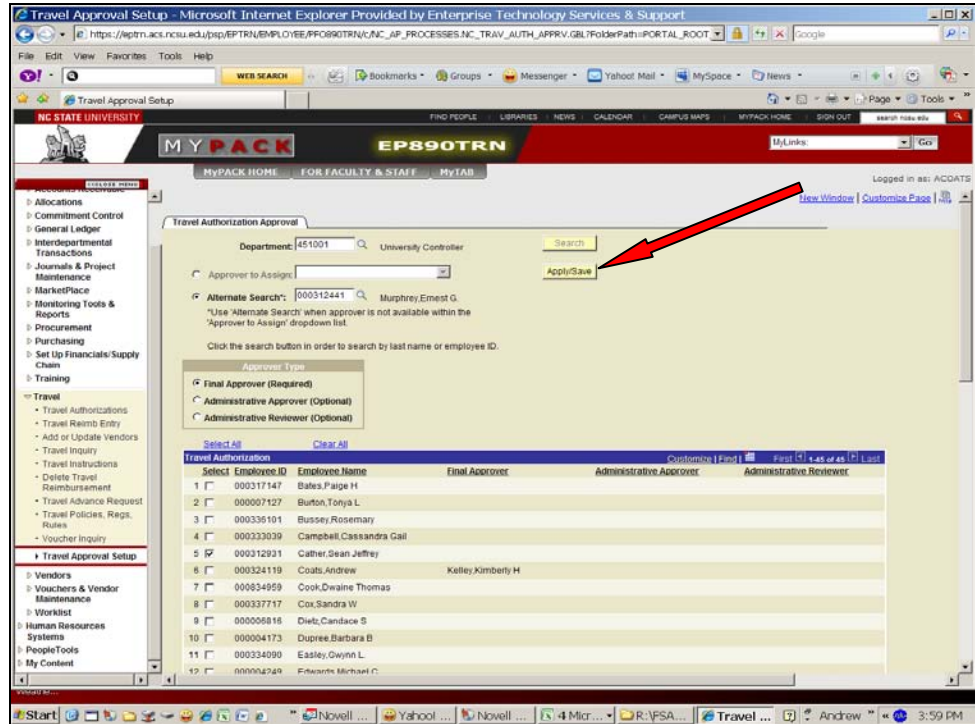
Step	Action
21.	Click the Look up Alternate Search* button. 



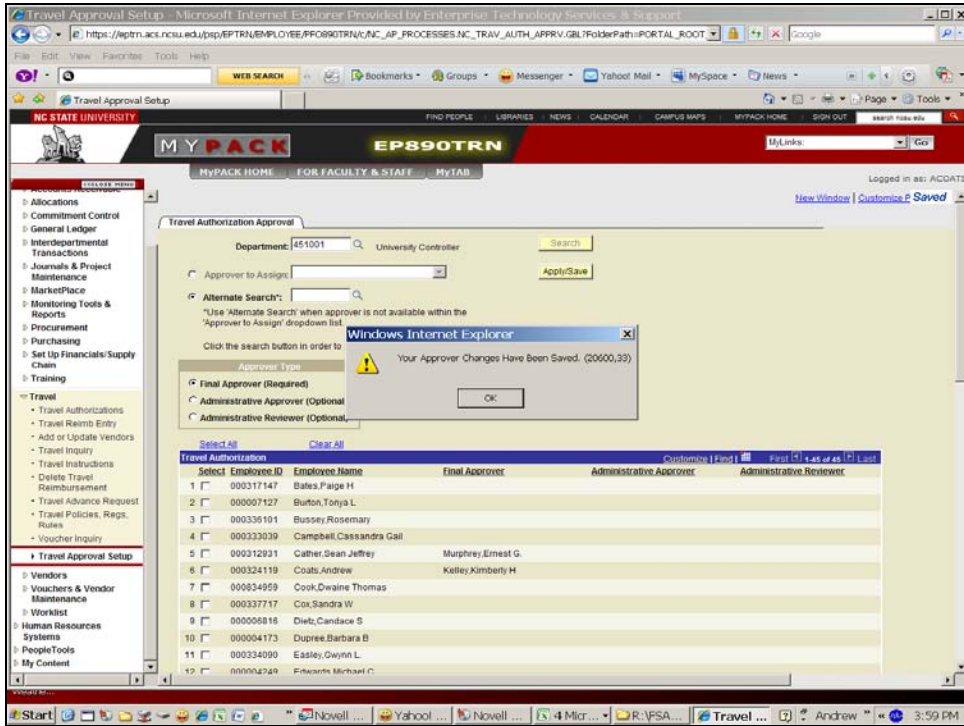
Step	Action
22.	Enter the Employee ID if you know it. If not, search on "Approver Name" field.
23.	Change drop-down field to " Contains " and type employee's Last Name and click "Look Up" to continue.
24.	Click the Look Up button. 
25.	Click appropriate entry in the Approver Name column. 



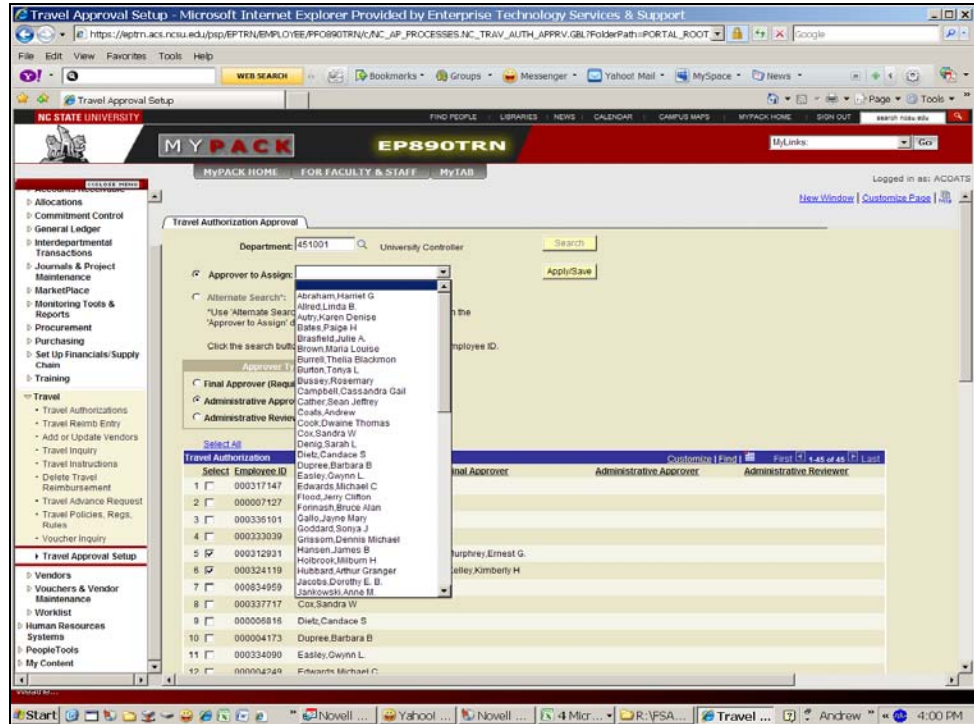
Step	Action
26.	Verify your selection from list is correct. <div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 5px auto;">Murphrey, Ernest G.</div>



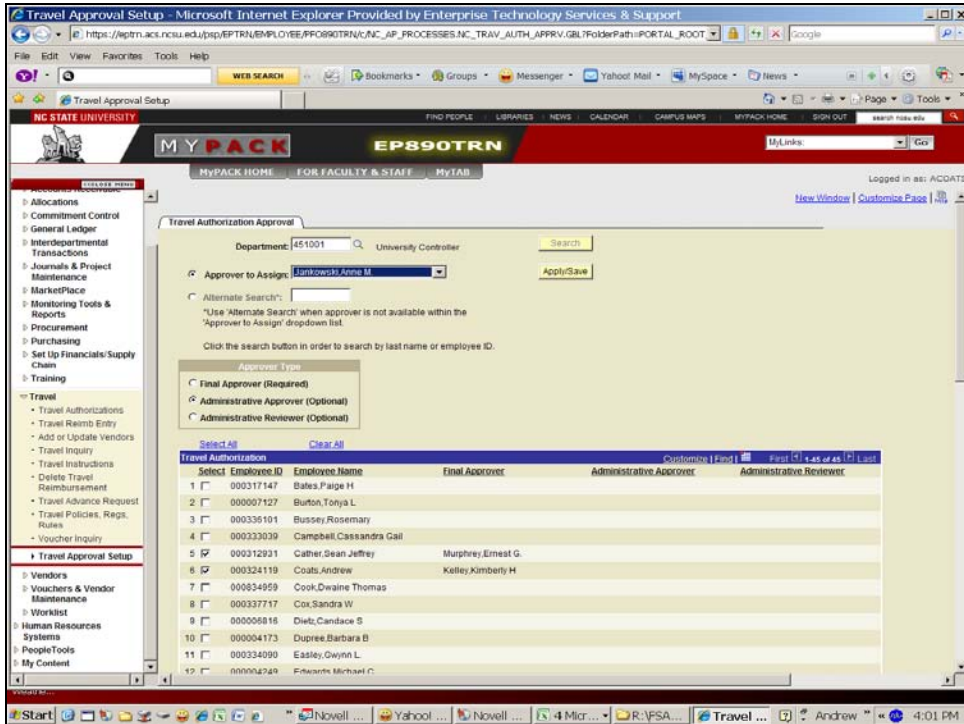
Step	Action
27.	<p>Make your selection on Approver Type - For now, we will click the Final Approver (Required) option.</p> <p>Note - A "Final Approver" is required for those employees who will travel (ie., not everyone needs to be set up).</p> <p>The other Approver Types are optional. Use as needed.</p> <p><input checked="" type="radio"/> Final Approver (Required)</p>
28.	<p>Click the Apply/Save button to record your changes.</p> <p>Apply/Save</p>



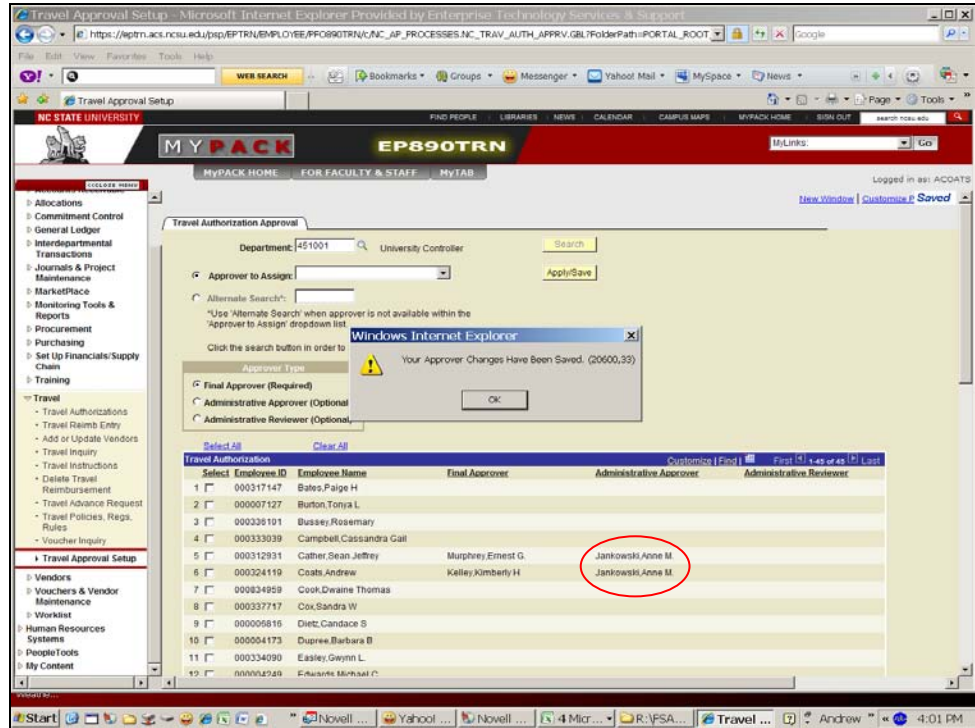
Step	Action
29.	Click "OK". This is your notification your changes were made. See the results below too. <div style="border: 1px solid black; padding: 5px; display: inline-block; margin-top: 10px;">OK</div>



Step	Action
30.	Now we need to add another "Approver Type". Select the employee(s) checkbox. <input checked="" type="checkbox"/> 000312931 Cather,Sean Jeffrey <input checked="" type="checkbox"/> 000324119 Coats,Andrew
31.	Click the Administrative Approver (Optional) button. <input type="radio"/> Administrative Approver (Optional)
32.	Search for the Approver to Assign <input type="text"/>
33.	Search for the name; Click the Approver to Assign dropdown list to search. <input type="text"/>
34.	Scroll down to name = Jankowski, Anne M. <input type="text"/>
35.	Click the Jankowski,Anne M. list item. <input type="text"/>



Step	Action
36.	Click the Apply/Save button to make the changes.



Step	Action
37.	This is your confirmation for changes made. Click OK to proceed. <div style="border: 1px solid black; padding: 2px; display: inline-block;">OK</div>
38.	Notice the requested changes have been recorded. You can re-perform this "Approver Setup" process as needed for each of the three (3) "Approver Types". <div style="border: 1px solid black; padding: 2px; display: inline-block;">Jankowski, Anne M.</div> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Jankowski, Anne M.</div>

Step	Action
39.	<p>Highlights on Approver Type:</p> <ol style="list-style-type: none"> 1. A Final Approver is <u>ALWAYS</u> required. 2. Use Administrative Approver if you want an additional "approver" in the workflow. 3. Use Administrative Reviewer if you <u>ONLY</u> wish to send a notice, and do not need another approval in the workflow. <p>NOTE - These settings are static. Meaning, each time the traveler has a Travel Authorization(TA) created these names will automatically populate on the TA and can not be altered there.</p> <p>Question – What if your departmental employee is traveling and another department’s ProjectID is paying for part or all of the trip on a <u>single</u> trip? How can you document someone from that department is approving? Answer 1 – If a one-time trip, the home department should create the TA and in doing so will add the paying department employee (Faculty, PI, Department Head) as an <u>Ad Hoc Approver during that process</u>. The approver to be added will depend on the circumstances. Answer 2 – If this is a continuous situation, then use the ‘Alternate Search’ process described in this manual and setup the approver. See step # 20 and following steps for instructions.</p> <p>Question - What if you need a one-time approver added to a single Travel Authorization? How is this done? Can it be done through the process covered in this manual? Answer - A ‘One Time’ or “Ad Hoc” approver is added at the time the TA is created. Ad Hoc Approvers/Reviewers are Not added in the process covered in this manual. SEE related travel manual “Create Travel Authorization – In/Out-of-State” step #117 for instructions on Ad Hoc Approver/Reviewer procedures.</p>
40.	<p>Congratulations ! You're Done. End of Procedure.</p>