eTravel Authorization Request Approval Delegates (Setup and Maintenance)

Version 1.0 January 2012

FAMIS Services The Texas A&M University System

Contracts & Grants and Foreign Desks

For each participating campus using eTravel, an ETRAVEL electronic office and five approver desks have been created in FAMIS. The ETRAVEL office and related desks are used to identify individuals who will perform the Contracts and Grants or up to four Foreign Authorization Request approver functions. The desk(s) will become 'virtual' employees in eTravel and the individuals will be eTravel delegates to these 'virtual' employees. This data will be updated in eTravel nightly from FAMIS. Utilizing this office and the coordinating desks eliminates the need to maintain this information in eTravel.

eTravel 'delegates' equate to FAMIS Desk Memberships.

Up to four foreign travel approvals can be defined in eTravel and are determined by policy at the individual campuses and at the System level. Although all four FOREIGNn (where n=1-4) desks may not be utilized by your campus, do not remove the unused desks from FAMIS. It is very important for the desk names and descriptions to match exactly with what is defined in eTravel.

The foreign approvals defined in eTravel must have corresponding desks established in FAMIS. FAMIS will establish four FOREIGNn desks initially. eTravel will require up to four desks for this function. Do not modify the description for the eTravel Office, the existing description will be expected by the software.

Office Setup

<u>omee setup</u>	
 Using Screen 940 enter the office ETRAVEL. Add a manager, delegate and default signer 	Do not modify the description for the ETRAVEL office
940 Office Create/Modify Screen: Office: ETRAVEL	
Description: TRAVEL OFFICE FOR CONCUR AUT	TH REQUEST
Manager (UIN) : 🛶	
Delegates (UIN) :	
Default Signer(UIN): 🛶	
Comments:	

Desks by Office

Five desks have been created for the ETRAVEL office. For the desks that apply, delegates need to be added selecting the desk from 937 or by direct entry on screen 922.

Basic Steps

- Advance to Screen 937.
- Type the ETRAVEL office on the Action Line to position it at the top of the list and press <ENTER> to display a list of all of the desks within the office.
- Press PF7 to display a list of desk assignees.

Selecting a Desk

To select a desk, move the cursor to the desired line, type an 'x' and press <ENTER>. The desk name will then be moved to the Desk: field in the Action Line and may be moved in context to other screens. This will advance you to Screen 922 for the selected desk.

				Do not modify the description for the ETRAVEL desks
937 Desks by Of	ffice			11/03/11 09:37 CC AM
Screen: 937 Of	ffice: ETRAVEL	Desk:	_	
S Desk	View	Description		
X CONTRACTS FOREIGN1 FOREIGN2 FOREIGN3 FOREIGN4	AUTHC AUTHC AUTHC AUTHC AUTHC AUTHC	PRIZATION REQUEST PRIZATION REQUEST PRIZATION REQUEST PRIZATION REQUEST PRIZATION REQUEST	DELEGATES DELEGATES DELEGATES DELEGATES DELEGATES	

NOTE: For each individual campus, the unused "FOREIGNn" desks should remain defined in FAMIS. The desk names must strictly follow the naming and description conventions of the desks indicated above. The Desk description is tightly controlled within ETRAVEL. Changes to the desk name or description will cause the nightly feed to eTravel to fail or produce errors.

Desk Management

Delegate changes can be made by adding and removing the desired delegates using screen 922. These changes will not appear in eTravel until they are updated during the nightly feed.

Basic Steps

- Advance to Screen 922.
- Type the name of the office and desk on the Action Line and press <ENTER> to display current desk information.
- Add or modify desk assignees as desired.
- If the UIN number is not known, press PF2 from the UIN: field and search for the person's name, select it and press <ENTER> to have FAMIS enter the UIN number in this field.
- Press <ENTER> to record the information.

922 Appr	over Desk Cr	eate/Modify				11/03/11	09:36 CC AM
Screen:	922 Office	: ETRAVEL	Desk:	CONTRACTS	6_ Delete	Desk: N	
Descript Number o	ion: AUTHORI f Assignees:	ZATION REQUEST	DELEG	ATES			
Func Tup	e UIN	Name			K		
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Last Revised: 1/23/2012 1:48 PM