SAA User Guide

This guide will assist SAAs during the iTavel implementation process. SAAs must authorize access to travel system users and establish Travel System Routing entries using the Enterprise Access Control System (EACS).

Authorize Access to iTavel via EACS

Points to consider:
- Multiple org. values for SAAs, best to designate one org. value to assign travel users.
- Multiple SAAs for an org. value, designate one SAA to assign travel users.
- Consider backup roles, assign more than one travel coordinator and final approver.

If users have already been added to EACS, travel roles can be assigned by clicking the username link.

Clicking on EMELYN will bring up the following window:
To assign iTavel access, highlight TRAVEL and click the “>” button.
The available Travel Roles are as follows:

- TRAVELER
- TRAVEL COORDINATOR
- PRE APPROVER (optional role)
- FINAL APPROVER

Designate a role and click the NEXT button.

Multiple roles can be assigned, to do so, repeat the process for each additional role.

At this point, SAAs may add additional travel user access or establish travel routing entries.
After assigning Travel Roles to the users in your department, it is necessary to create Travel System Routing.

To Establish Travel System Routing, click the TRAVEL SYSTEM ROUTING button

*Note! The Travel Routing option is also available from the main EACS menu.

**TRAVEL SYSTEM ROUTING:**

Selecting the TRAVEL SYSTEM ROUTING button will bring up the following window. Options are available to add and edit Travel Routing entries. SAAAs can create Default or Specific routing entries.

A default Travel Routing can be created that apply for most travel employees as well as specific travel routings for travelers who require special approvals.

Follow the steps below to create a DEFAULT routing:
Please note that employee travelers (vendor number begins with an “E”) will be shown in mixed case, while non-employee travelers (vendor number begins with an “V”) will be presented in ALL CAPS. Below is an example from the Add Travel Routing screen.

Under TRAVELER select ALL
Assign a Travel Coordinator and click the “>” button. It is possible to assign more than one travel coordinator, and you may assign a “preferred” status to a travel coordinator.
A Pre Approver may be designated, although it is not required.
A Final Approver must be selected.

When all roles have been designated, click the ADD button.

Below is an example of a default and traveler specific routing:
This example illustrates default and special routing for an Academic Department.

The default routing (for all travelers not assigned special routing) assigned user ALEXIS as the travel coordinator and user DEBBIEV as the Final Approver.

Special routing entries were made for the Academic Department Chair (Donald Cooksey) who requires additional approval from the CNAS Dean's office. It was necessary to add Linda Pletcher as a Final Approver to meet this requirement. Additionally, the optional role of Pre Approver was added to allow the CFO (Darrell Ruml) to review the request before it was submitted to the Dean's Office. Finally, a Final Approver cannot approve their own travel expense reports, so it was necessary to include special routing for the final approver Debbie Van Zanten.

Darrell Ruml was added as her Final Approver.

Note! Routing entries may be modified by selecting the EDIT option or deleted by selecting REMOVE. If a routing entry is modified, travel expense vouchers in progress will display in the appropriate travel user queue, no email notices will be sent for previous routing actions.

<table>
<thead>
<tr>
<th>Traveler ID</th>
<th>Traveler Name</th>
<th>Travel Coordinator</th>
<th>Pre Approver</th>
<th>Final Approver</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL</td>
<td>DEFAULT</td>
<td>ALEXIS</td>
<td></td>
<td>DEBBIEV</td>
<td>Valid</td>
<td>Edit [Remove]</td>
</tr>
<tr>
<td>E051706615</td>
<td>DARRELL D. RUML</td>
<td>ALEXIS</td>
<td></td>
<td>PLETCHER</td>
<td>Valid</td>
<td>Edit [Remove]</td>
</tr>
<tr>
<td>E054562901</td>
<td>Cooksey, Donald A.</td>
<td>ALEXIS</td>
<td>DRUML</td>
<td>PLETCHER</td>
<td>Valid</td>
<td>Edit [Remove]</td>
</tr>
<tr>
<td>E055547716</td>
<td>Van Zanten, Debbie D</td>
<td>ALEXIS</td>
<td></td>
<td>DRUML</td>
<td>Valid</td>
<td>Edit [Remove]</td>
</tr>
</tbody>
</table>