eTRAVEL ENHANCEMENTS EFFECTIVE 04.01.2015: WHAT’S NEW?

JABSOM ADMINISTRATORS’ MEETING
APRIL 2, 2015| 9:30 – 10:30
MEB 304
WHAT HAS NOT CHANGED?

- No Change to Policies (APM A8.851)
- Account/Fund Types
  - Tuition (2xxxxxxx)
  - RTRF (3xxxxxxx)
  - Private (4xxxxxxx) when used with Tuition or RTRF
  - Federal (6xxxxxxx) when used with Tuition or RTRF

JABSOM Office of Fiscal & Administrative Affairs
ENHANCEMENTS/CHANGES

- Electronic Approvals
- Electronic Attachments
- UH Foundation Funded Travel
- No-Cost Travel
- Original Receipts
- Transition Period

JABSOM Office of Fiscal & Administrative Affairs
# Electronic Approvals

## Role Definition

<table>
<thead>
<tr>
<th>Role</th>
<th>Definition</th>
<th>Intra-State</th>
<th>Out-of-State</th>
<th>No Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preparer</td>
<td>Department Administrator</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Traveler</td>
<td>Traveler</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Traveler’s Immediate Supervisor</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Account Supervisor</td>
<td>Principal Investigator / Approving Authority</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Dept Chair</td>
<td>Department Chair (Ad Hoc)</td>
<td>X</td>
<td>X*</td>
<td>X</td>
</tr>
<tr>
<td>Executive Authority</td>
<td>Dean (and/or Delegate)</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Fiscal Admin</td>
<td>Fiscal Administrator</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

- **Legend:**
  - R = Request, C = Completion
  - * only required for itinerary changes

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*JABSOM Office of Fiscal & Administrative Affairs*
## DELEGATES

<table>
<thead>
<tr>
<th>ROLE</th>
<th>BASED ON</th>
<th>DELEGATE IN</th>
<th>DURATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preparer</td>
<td>Profiler</td>
<td>Profiler</td>
<td>Forever</td>
</tr>
<tr>
<td>Traveler</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Supervisor</td>
<td>PeopleSoft</td>
<td>Profiler</td>
<td>1 Year</td>
</tr>
<tr>
<td>Account Supervisor</td>
<td>KFS</td>
<td>KFS</td>
<td>30 Days</td>
</tr>
<tr>
<td>Dept Chair</td>
<td>PeopleSoft</td>
<td>Memo</td>
<td>Variable</td>
</tr>
<tr>
<td>Executive Authority</td>
<td>PeopleSoft</td>
<td>Profiler</td>
<td>1 Year</td>
</tr>
<tr>
<td>Fiscal Admin</td>
<td>KFS</td>
<td>KFS</td>
<td>Forever</td>
</tr>
</tbody>
</table>
EMAIL NOTIFICATIONS

- Automatic email notifications will be sent to the next approver in the workflow.

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From: <uh-workflow@hawaii.edu>
Date: Tue, Aug 19, 2014 at 9:41 AM
Subject: REQUEST + ADVANCE (T544442) for TANAKA, KAY K [QA]
To: cahana@hawaii.edu

*******************************************************************************
FOR QA PURPOSES ONLY
*******************************************************************************

The following Travel Request has been submitted through the eTravel System:

Travel Number: T544442
Traveler: TANAKA, KAY K
Destination: Foreign
Category: Conference / Seminar
Travel Period: 09/01/2014 - 09/10/2014

You are now responsible to APPROVE or DENY this Travel Request as the TRAVELER at:
https://www.test.hawaii.edu/trvl/lookupDispatch.do?docId=3745

You can view ALL PENDING documents requiring your approval at:
https://www.pprd.hawaii.edu/workflow/kew/ActionList.do

You can view the eTravel application’s “User Guides” at:
http://www.hawaii.edu/etravel/faq_storyboard.html
AD HOC ROUTING

- Similar to KFS Ad Hoc Routing
- Only Approve
  - Document will “sit” with ad hoc person until s/he approves
  - No Acknowledge or FYI
ELECTRONIC ATTACHMENTS

- Label
- Order and Re-Order
- Delete
- Completion links to Request for easier reference

JABSOM Office of Fiscal & Administrative Affairs
100% UH FOUNDATION-FUNDED TRAVEL

- Upload Receipts and Supporting Documentation to Online Travel Request / Completion
- Print UHF Form
- Print Travel Form
- Attach Original Receipts and Supporting Documentation
- Route hard copy for signatures as normal
  - No electronic approval process for UHF
PARTIAL UH FOUNDATION-FUNDED TRAVEL

- Upload Receipts and Supporting Documentation to Online Travel Request / Completion
- Print UHF Form
- Print Travel Form
- Attach Original Receipts and Supporting Documentation
- Route hard copy for signatures as normal
  - No electronic approval process for UHF
  - UH portion will route for electronic approvals

JABSOM Office of Fiscal & Administrative Affairs
NO-COST TRAVEL

- For electronic routing and tracking purposes, all No-Cost travel for UH Employees should be processed through eTravel
  - Do not use RCUH or manual DISB-4 Form
- No longer need to email Coco Seymour to approve travel documents
- Do not submit hard copy to Fiscal Admin
**WHAT HARD COPIES DO I SUBMIT?**

<table>
<thead>
<tr>
<th>ITEM</th>
<th>UH</th>
<th>UHF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel Form</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>UHF Form*</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Original Receipts</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Submit to:</td>
<td>JABSOM Fiscal Admin</td>
<td>UH Foundation</td>
</tr>
</tbody>
</table>

**NOTES:**
- * Requires original hard copy signatures and may be used in lieu of standard UHF Check Request Form

JABSOM Office of Fiscal & Administrative Affairs
# Transition Period

<table>
<thead>
<tr>
<th>REQUEST</th>
<th>COMPLETION</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEFORE 04.01.15*</td>
<td>AFTER 04.01.15*</td>
</tr>
<tr>
<td>X</td>
<td>Hard Copy</td>
</tr>
<tr>
<td>X</td>
<td>Hard Copy</td>
</tr>
<tr>
<td>X</td>
<td>Electronic</td>
</tr>
</tbody>
</table>

- **NOTES:**
  - * Based on when Preparer clicks “Submit” button
  - ** Fiscal Admin will scan/attach fully approved Travel Request

JABSOM Office of Fiscal & Administrative Affairs
RESO URC ES

- Profiler Site
  - www.hawaii.edu/profiler
- eTravel Live Site
  - www.hawaii.edu/etravel
- eTravel Training Site
  - www.hawaii.edu/etravel/training
- eTravel Enhancements Page
  - www.hawaii.edu/etravel/releases_new.html