ETRAVEL ENHANCEMENTS & CHANGES TO A8.851

Effective May 1, 2017

Business Office Review
Viewing Standard
Significant Changes
Sanctioned Countries
Business Office Review
Current Workflow

1. Preparer
2. Traveler
3. Supervisor
4. Accr Supervisor
5. Executive
6. FA
7. Disbursing

Start

Traveler/Preparer

Need Supervisor Approval?

Need Accr Supervisor Approval?

Need Executive Approval?

Need FA Approval?

Need Disbursing Action?

End
New Workflow

Start

Traveler/Preparer

Need Business Office Review?

Need Supervisor Approval?

Need Acct Supervisor Approval?

Need Executive Approval?

Need FA Approval?

Need Disbursing Action?

End
• Business Office Review step has been added

• Members of the Business Office Access group indicated on the travel document can view and edit all fields including:
  • Account codes
  • FAR
  • Dollar amounts

• Members of the Business Office Access group can be edited in Profiler

• Once the travel document has been approved by the Business Office, the document becomes uneditable and routes accordingly
Viewing Standard
Current Viewing Standard

- Preparer
- Traveler
- Anyone associated with the “Business Office Access” group indicated on the travel document can view the document
New Viewing Standard

- Preparer
- Traveler
- Anyone associated with the “Business Office Access” group indicated on the travel document can view the document
- The business office associated with the FO account(s) being used
How to Edit - Business Office

- In Profiler, the lead FO can edit the business office members
  - “Lead FO” defined as the lead FO listed on the most recent effective account
- To update, click on Fiscal Office Groups and Group Members
How to Edit - Business Office

• Add/delete members of the business office by UH Username

- FO Group Members
  - By FO Code
    - Members by FO Code have the same fiscal authority as the Lead FO. They may also edit membership of this group.
    - FO Code | Name | Delete
      - (none)
  - By UH Username
    - Members by UH Username have the same fiscal authority as those with FO Codes, but they cannot edit group membership.
    - UH Username | Name | Delete
      - (none)

- Departmental Preparers
  - Departmental Preparers have access to prepare and audit all fiscal documents but cannot approve as an FO.
  - UH Username | Name | Delete
    - (none)
Significant Changes
**Definition of a “Significant Change”**

- A significant change is when any of the following criteria are met between the request and completion:
  - Increase of 15% or more to the Owe Traveler amount OR increase of $75 or more
  - Change in Process Via
  - Change in Destination
  - Change in Account Code(s)
  - Change in distribution between accounts used (Request vs. Completion)
  - Change of a day or more in calculated days
New Workflow Without Significant Changes

• If there are no significant changes between the request and completion, the completion will not route to the supervisor or account supervisor for approval.
• If there is a significant change between the request and completion, the completion will route as usual
Sanctioned Countries
Travel to Sanctioned Countries

- The traveler’s supervisor must notify the UH Office of Export Controls ("UH OEC") when employee's destination(s) includes sanctioned countries.
- Refer to the Office of Foreign Assets Controls Sanctions Programs and Country Information for list of current sanctioned countries.

- Individuals traveling to sanctioned countries must coordinate their travel and activities with the UH OEC.
- Refer to EP 12.218 - Compliance with United States Export Control Laws and Regulations.
Thank You!

For eTravel inquiries:
etravel-help@lists.hawaii.edu

For technical problems:
etravel-tech@lists.hawaii.edu