

Travel Arranger

Document Overview:

The Travel Arranger document (TTA) is a Kualu document that is used to set up travel arrangers for CSU travelers. The arranger document can establish new arrangers for both employee and non-employee travelers as long as the traveler has a TEM Profile set up in Kualu.

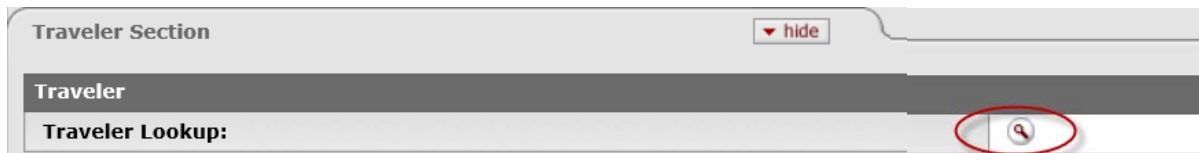
TTA documents can be submitted by any individual with Kualu access who needs to prepare TA or TR documents for individual CSU travelers.

How to Complete the Document:

On the Main Menu in Kualu under Transactions and Travel there is a link to the Travel Arranger document. Any individual with Kualu access can access this link to open a new document.


Once open an explanation should be entered describing the reason for creating the TTA. The description field does not auto populate on this document and needs to be filled out as well.

Next, the traveler information needs to be entered. This should be the traveler that the document initiator is requesting access for. This information is imported from the travelers TEM Profile and is imported by clicking the magnifying glass next to Traveler Lookup on the far right side of the document:



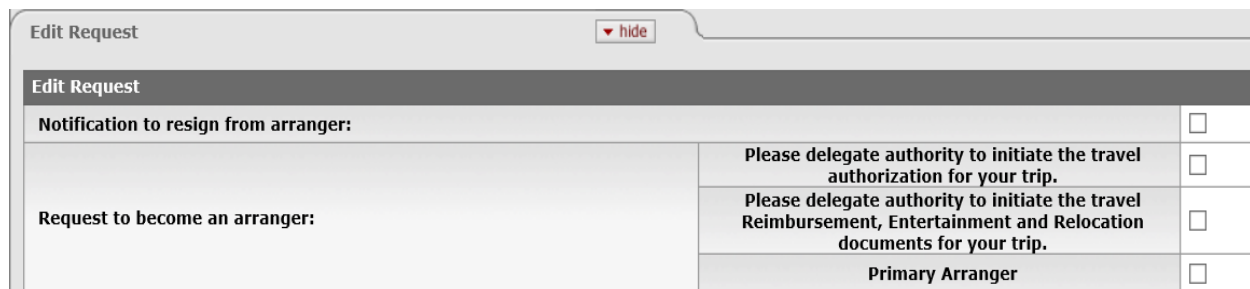
Traveler Section ▼ hide

Traveler

Traveler Lookup: 

Clicking the magnifying glass will take the user to a lookup screen. A search for the traveler should be done to locate the traveler in the system. Typically the last name is all that needs to be entered to find the traveler, if the last name is fairly common the first name can be added to help narrow search results. The search query should give a list of travelers. From that list the traveler should be identified and then the user will click on the “return value” link next to their name. Once return value is selected the traveler name is imported to the TTA document.

Next the Edit Request tab needs to be completed. This tab allows users to either resign as an arranger if they are already set up as an arranger or to request access to create TA and or TR documents as a new arranger. The appropriate boxes should be checked:



Edit Request ▼ hide

Edit Request	
Notification to resign from arranger:	<input type="checkbox"/>
Request to become an arranger:	Please delegate authority to initiate the travel authorization for your trip. <input type="checkbox"/>
	Please delegate authority to initiate the travel Reimbursement, Entertainment and Relocation documents for your trip. <input type="checkbox"/>
Primary Arranger	<input type="checkbox"/>

The Primary Arranger box should be left blank. This restricts access to other travel arrangers who may also arrange travel for this individual. After the Edit Request tab is complete the document can be submitted.

Document Routing:

Routing of this document will differ based on traveler type. For all employee travelers this document will route to the traveler, who must approve. If the traveler does not approve the document the document initiator will not be added and the request to either resign as an arranger or become an arranger will not be processed. If the traveler is a non-employee the document will go final once the document is submitted without errors and all requests will be granted immediately.

Document Exceptions/Restrictions:

There are no exceptions or restrictions for this document as long as someone has access to Quali.