Travel Arranger

Document Overview:

The Travel Arranger document (TTA) is a Kuali 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 if the traveler has a TEM Profile set up in Kuali.

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

How to Complete the Document:

On the Main Menu in Kuali under Transactions and Travel there is a link to the Travel Arranger document. Any individual with Kuali 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:

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 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

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Notification to resign from arranger :		☐
	Please delegate authority to initiate the travel authorization for your trip.	☐
Request to become an arranger:	Please delegate authority to initiate the travel Reimbursement, Entertainment and Relocation documents for your trip.	☐
	Primary Arranger	☐

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, submit the document.

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 it is submitted without errors, and all requests will be granted immediately.

Document Exceptions/Restrictions:

There are no exceptions or restrictions for this document.