Set up Delegate & Travelers

Setting Up a Delegate and Assigning New Travelers

Learn how to Login to Banner Travel and Expense Management Application and to set up yourself as a Delegate and assign Travelers to your account. Set up travelers profiles and funding information.
How to login.

Enter Banner Travel & Expense Management system using your BSU user name (without the @bsu.edu extension) and password.
Example: use jsmith, don't use jsmith@bsu.edu
(This is the same user name and password you use to login to Outlook)

If you are Entering the system the first time.
First 3 Things to do. . .

1 Setting your Profile information.
The delegate is anyone who arranges travel for their department or any individual. You will need to set your profile information before assigning travelers to you.

As the Delegate you will be able to . . .
• update the traveler's profile.
• view, edit, and copy authorization and expense reports for the traveler.
• submit reports to the traveler for review.
• Set up the profile information for Each Traveler. The traveler's address, email, and approver information. Assign Travelers to the Delegate.

2 Assign Travelers to the Delegate.
These are people the Delegate arranges travel for.

3 Set up a Profile for Each Traveler.
The traveler's address, email, and approver information is entered.

These 3 steps are, for the most part, a one time set up. The only time you need to change this information is when . . .
• you need to add or delete a traveler.
• you need to modify the default funds set up for the traveler.
Step 1 - Setting Your Profile Information

As the Delegate: you will need to set up your default profile information before you set up your travelers and their profiles. Follow the steps below to set up your profile information.

1. SELECT > the Delegate Tab.
   Make sure “Self” is selected in the Delegate drop down list.

2. SELECT > the Profile Tab
   Make sure all the information is correct.
   If you see a **Do Not use** in the Address box you need to edit the information.

3. SELECT > the pencil icon in the Address/Direct Deposit box.
   Choose the address that has the “Accounts Payable” option in the Type category. If it says **Do Not use**, then choose another option that is available.

4. CLICK > the Select button.
   If you are not signed up for the direct deposit yet, go to the Accounting Office website www.bsu.edu/accountingoffice

Workflow Login ID will default to your BSU user name and ID number. DO NOT CHANGE THE INFORMATION
Step 2 - Select the Delegate

1. SELECT > the Delegate Control tab at the top of the travel screen.

2. Make sure Assign By Delegate in the left menu panel is selected.

3. CLICK > on the “Click here to Select a Delegate” link.

4. TYPE > your Last Name in the Search by Last Name field.

5. CLICK > on your name from the list displayed below.

6. CLICK > the Select button.

Make sure your name appears next to the Delegate: status line.
Step 2 - Assigning Travelers to the Delegate

7. CLICK > on the Add Traveler button at the bottom of the screen.

8. Select the new traveler from the list and CLICK > on the Add button. Continue searching for people and adding them to the list of travelers you will be handling.

Advanced Search
CLICK > on the Advanced Search tab
SELECT > the Attribute tab
In the Banner ID field type the traveler’s BSU ID number.
(The BSU ID number is the 9 digit number starting with 000_ _ _ _ _ _ _)

NOTE: Do not use a traveler with an S in front of the ID number.

9. When you are finished selecting travelers CLICK > on the Close button.

You will then see the list of Travelers you selected.
Step 2 - Assigning Travelers to the Delegate

After all the travelers have been added CLICK > the Save button.

NOTE: If you don't Refresh you will not see the added travelers in the drop down list.

CLICK > on the Delegate Tab.

CLICK > on the Refresh button.

NOTE: If you don't Refresh you will not see the added travelers in the drop down list.
Step 3 - Set Up Travelers Profile Information

1. SELECT a traveler from the drop down menu.
   CLICK on the Profile tab.

2. Address or Direct Deposit
   If you see a **Do Not use** in the Address box you need to edit the information.
   SELECT the pencil icon in the Address/Direct Deposit box. Choose the address that has the "Accounts Payable" option in the Type category. If it says **Do Not use**, then choose another option that is available.
   CLICK the Select button.
   If they are not signed up for the direct deposit go to the Accounting Office website www.bsu.edu/accountingoffice

3. Funding Default
   Set the account to the most frequently used for this traveler.
   CLICK on the Pencil button to the right of the Funding Default box to edit the information.
   You can use either the Index code or the FOP (Fund, Org., and Program) codes NOT BOTH.
   ENTER 1 for the Chart (1 is always used).
   ENTER the Index code.
   SELECT the appropriate Department from the drop down list or ENTER the FOP codes.
   CLICK the Add button.

4. CLICK the Save button.
   The Default Funding information is now set up.