

Assign Travel Accounts - DA5100

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This page is used to mass assign account codes by primary campus, department code (optional), and year for employees using the travel reimbursement request feature in EmployeePortal.

After running this process, a user profile is created with the assigned account codes for each active person with the primary campus/dept on their Job Info record that matches the selection on this page.

When submitting a travel reimbursement request in EmployeePortal, employees will be able to use these account codes to indicate the budget to be charged for a travel reimbursement request.



IMPORTANT: If you are creating records for users by campus and department, you must select a campus, indicate the department, and click **Retrieve**. This must be done upon initial retrieval. Otherwise, select a campus and click **Retrieve**.

Modify a record:

Field	Description
Campus	Click ⌄ to select a campus.
Dept	Type a one-character department code. This field is optional.

❑ Click **Retrieve**. The campus/department record is displayed.

❑ In the **CYR/NYR** field, click ⌄ to indicate the year (Current or Next) to apply the changes.

❑ Type an account code or mask (X) in each of the account code component fields. Click **+Add** to add rows as needed.

❑ Click **Save** to save the record without executing the changes.

❑ Click **Execute** to execute the process. A user profile is created for each active person with the selected primary campus/dept. The user is assigned the selected accounts for the primary campus/dept and the **Travel** check box is selected to indicate that the user will have access to the assigned accounts when submitting travel requests in EmployeePortal.

Other functions and features:

	Click to delete the selected row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**. A message is displayed confirming that you want to delete the row. • Click **OK** to delete the row. • Click **Cancel** not to delete the row.
Delete	Click to delete the entire account code record for the selected campus/department.


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