Web Travel Groups and Routes
in the FRED System

Purpose: To set up groups and routes that will be used for Web Travel in the FRED system.

Security Access Requirement: You must be setup as a Route Administrator for your department. To request access to the system, contact your department's Access Request Coordinator.

Prerequisites: None.

Find Help: Contact your department's Route Administrator. If you are the Route Administrator, call 919-962-HELP and the issue will be routed appropriately.

Contents

Sign in to Web Travel

- Log in to ConnectCarolina using your Onyen and password.
- Select Finance > WebTravel from the left menu

Subsystem: Add to Department

Choose "Add to Dept" from Subsystem section of the menu.
1. **Select Department -** Your department should be the default.
2. **Click "Go" button.** [Go] This will take you to the "Department Subsystems" page, where subsystems are linked to the selected department.

3. Find the subsystem that you want to make available to the department in the "Add Subsystems" table below the "Existing Subsystems" table.
4. **Check Box** for "Add as User".

5. Click "Update" button. `Update`

Flexible Routing of Electronic Documents **THE UNIVERSITY *of* NORTH CAROLINA *at* CHAPEL HILL**

Menu

Department Subsystems

Options:

Introduction

Inbox

Subsystems:
Create
Modify
Add to
Dept.
Busn Rules

Groups:
Create
Modify

Routes:
Create
Modify

Add Pers
Info

Help

Dept: 213100 - Finance Commun and Training

Existing Subsystems:

Department Subsystem	Default Route Choice	Email Preference	Delete
Web Travel (as User)	Use Default ∨	Allow ∨	☐

Add New Subsystems:
No new subsystems available

`Update`

Set Default Route Choice

1. **Choose Default Route.** This is the route choice that creators can select. You can choose to automatically put the document on one default route, or allow the user to select the desired route from a list. However, even if you choose the select from list option, there must always be one route that is selected to be default so that routing on the fly may happen. Designating the default route is done via the Route Modify screen.
2. **Choose Email Preference.** You can select to "Allow", which would send an email to the Primary approver when a document is in their inbox for approval. Or you can choose to "Disallow", which will not send an email. Backup approvers do not receive an email.
3. **Click "Update" button.** `Update`

Create a New Group

Choose "Create" from Groups section of the menu.

1. **Enter Group Name,** which must be unique. Try not to be subsystem specific if this is a group of people who will be approving documents from multiple subsystems. You may change the name of the group at any time if you decide to change it.
2. **Select Department.** This is the department that will own the group. Your department number is selected by default, but you can create groups for any department that rolls up to your department on the UNC Organization database.

3. **Click "Create" button.** This will create the group, and take you to the Group Details page, where you will assign members and subsystems to the group.

Group Details Page

On this page, you create / modify the membership and subsystem details associated with a group. A group must have at least one primary member and one subsystem to be considered Valid.
Note that in FRS2, Web Travel is the only subsystem available to campus. Only approvers are listed in the groups. You can create multiple groups for a department.

Add Members

1. **Select Department.** The department shown by default is the owning department chosen on the "Create Group" page. Select a different department to add members from that department.
2. **Select a Name** from the list to assign as a member of the group. Everyone in the selected department is listed here. There must be at least one Primary person in each group.
3. **Select Approval Role.** Primary members are responsible for approving the documents that appear in their Inboxes. Backup members are responsible for approving documents in the absence of Primary members.
4. **Click "Modify" button.**

Add Subsystems

1. **Select Subsystem.** Select the Web Travel (as user)
2. **Click "Modify" button.**   Modify

Group Details

Dept: 213100 - Finance Commun and Training

Name: Test Group

Status: Invalid

Where Used?

Existing Members:

Group Members	Role	Delete
Howell, Troy	PRIMARY	☐
Buria, Catherine	BACKUP	☐

Add New Members:

Type in or choose a department to list employees in other departments

Enter: [   ]   Or Select:

213100 - Finance Commun and Training

Name	Role
Select a member here ... Kastrinsky, Joshua Kelly-Scholle, Janet	PRIMARY ▾

Submit New Person Information

Existing Subsystems:
No subsystems are linked

Add New Subsystems:

Subsystems

Select a subsystem here ...
Web Travel (as User)

Modify/Delete Group Members and/or Subsystems:

Click the button to Modify/Delete Group Members and/or Subsystems for this Group: Modify

Delete Group:

Click the button to Delete this Group: Delete

Notice that the Status is now "Valid"

Group Details

Dept: 213100 - Finance Commun and Training

Name: Test Group

Status: Valid

Where Used?

Existing Members:

Group Members	Role	Delete
Howell, Troy	PRIMARY	☐
Buria, Catherine	BACKUP	☐

Add New Members:

Type in or choose a department to list employees in other departments

Enter: [ ]   Or Select:

213100 - Finance Commun and Training

Name	Role
Select a member here ... Kastrinsky, Joshua Kelly-Scholle, Janet Vershave, Kimberly	PRIMARY ▾

Existing Subsystems:

Group Subsystems	Delete
Web Travel (as User)	☐

Add New Subsystems:
No subsystems available for this department

Modify/Delete Group Members and/or Subsystems:

Click the button to Modify/Delete Group Members and/or Subsystems for this Group: **Modify**

Delete Group:

Click the button to Delete this Group: **Delete**

Delete Members or Subsystems
1. **Check "Delete" box.** One or more members and/or subsystems may be deleted at one time.
2. **Click "Modify" button.** **Modify**

List Routes that Use this Group
1. **Click "Where Used? Button.** **Where Used?** A small window opens, with a list of all routes using that group.

Modify an Existing Group

When you modify a group, the system automatically updates the group everywhere it is used in a route. Choose "Modify" from Groups section of the menu.

Menu

Options:

Introduction
Inbox
Subsystems: Create Modify Add to Dept. Busn Rules
Groups: Create Modify
Routes: Create Modify
Add Pers Info
Help

1. **Select Owning Department.**
2. **Please wait…**for the list of subsystems used by this department to load in the next dropdown box.
3. **Select Subsystem.** Select Web Travel (as user.)

4. **Please wait…**for the list of groups used by the selected department and subsystem to load into the next dropdown box.
5. **Select Group** to be modified.
6. **Click "Modify" button.** Modify

Flexible Routing of Electronic Documents — THE UNIVERSITY *of* NORTH CAROLINA *at* CHAPEL HILL

Groups

Modify Group:

1.	**Department:**	Enter: [ ]	Or Select:	213100 - Finance Commun and Training ▾
2.	Please wait for Subsystems to load …			
3.	Select **Subsystem:**	Web Travel (as User) ▾		
4.	Please wait for Groups to load …			
5.	Select **Group:**	Test Group ▾		
6.	Click button to modify group on Group Details page:	Modify		

Result: The system displays the Group details page, where you can change the approvers listed in the group.

Approvers Who Move to Another Department

1. If an approver who is listed in the group has moved to another department, a yellow warning appears next to that person's name. That individual will NOT be able to successfully approve documents for this Group. The FRED Admin will need to remove them and possibly re-add them using their current department in the Add New Members drop-down.

2. Clicking on the icon will generate message to advise the FRED admin that the person is no longer with the original department number. The FRED admin can then delete the approver and, if needed, re-add.

Approvers Who Leave the University
1. If an approver who is in the group leaves the University, their name will be replaced by their PID in the list, and a red triangle will appear next to the PID.
2. Hovering over the icon will generate a message to advise the FRED admin that the person is no longer with the University. The FRED admin can then delete the approver.

Group Details

Dept: 214000 - Continuous Improve & BI
Name: CIBI-Webtravel
Status: Valid
Where Used?

Existing Members:				Existing Subsystems:	
Group Members	Current Dept	Role	Delete	Group Subsystems	Delete
Newton, Norma M	215200	PRIMARY	☐	Web Travel (as User)	☐
Hatley, Cathy H	215200	BACKUP	☐		
Whidbee, Chelsea R	215200	BACKUP	☐		
Horton, Antoinette M	215200	BACKUP	☐		
Clay, Kendra A	215200	BACKUP	☐		
Burroughs, Laurie A	215200	PRIMARY	☐		
714017231 ⚠	214000	BACKUP	☐		

Add New Members:
No members available in this department

Add New Subsystems:
No subsystems available for this department

214000 - Continuous Improve & BI ▼

PID: [____]

Modify/Delete Group Members and/or Subsystems:

Click the button to Modify/Delete Group Members and/or Subsystems for this Group: [Modify]

Delete Group:

Click the button to Delete this Group: [Delete]

Deleting the Last Member in a Group

- The last member in an approval group CANNOT be removed if the group is currently IN USE by a travel document.
- The last member in an approval group CAN be removed if the group is currently NOT in use by any document.

Create a New Route

Choose "Create" from Routes section of the menu.

Menu

Options:

Introduction
Inbox
Subsystems: Create Modify Add to Dept. Busn Rules
Groups: Create Modify
Routes: Create Modify
Add Pers Info
Help

1. **Enter route name,** which must be unique.
2. **Select Department.** This is the department that will own the route. Your department number is selected by default, but you can create routes for any department that rolls up to your department on the UNC Organization database.
3. **Please wait…**for the list of subsystems used by this department to load into the next dropdown box.
4. **Select Subsystem,** which will be the source of documents that use this route.
5. **Please wait**…for the Route Type Codes determined by this subsystem to load.
6. **Select Route Type Code.** This is the type of route that this route should use. For Users of a subsystem, the only choice will be "Normal." If you are the Owner of a subsystem, it will contain the other business office route types that were specified during Subsystem creation.
7. **Select Sharing Option**, which determines what other departments are allowed to use this route. You can choose to share this route with your own department only, which any department in your rollup structure, or with all FRED users.
8. **Select Ordering Option**, which determines how documents will travel on this route, in either an Ordered or Unordered way.
9. **Check the set as default route box**, only if you want this route to be the default route that documents will use. There must a default route for Web Travel for routing on the fly and for documents that may be created by other departments. If the select from list option is chosen in the departmental set up, then the user will still be able to choose from your list of available routes for that subsystem.

10. Click "Create" button. Create   This will take you to the Route Details page, where you will add groups to the route. Each route must have at least one group.

**Flexible Routing
of Electronic Documents**   **THE UNIVERSITY *of* NORTH CAROLINA *at* CHAPEL HILL**

Routes

Create Route:

1.	**Enter Route Name:**	Training Route
2.	**Department:**	Enter: [ ] Or Select: 213100 - Finance Commun and Training ⌄
3.	Please wait for Subsystems to load ...	
4.	**Select Subsystem:**	Web Travel (as User) ⌄
5.	Please wait for Route Type Codes to load ...	
6.	**Select Route Type Code:**	Normal ⌄
7.	**Select Sharing Option:**	Share ⌄
8.	**Select Ordering Option:**	Ordered ⌄
9.	**Set as Default Route?**	☑
10.	Click button to create route and proceed to Route Details:	Create

Route Details Page

On this page, you build the route and add such details as Approval Conditions, Transfer Overrides, and Destinations.

Add Station
1. **Select group.** These are all the groups in your department.
2. **Select position.** This lets you put the new station in any place along the route. If you do not make a selection, the station will be added at the end.

3. **Click "Add" button.** [Add]   This will add the station to your route.
4. **Repeat steps 1-3** until you have added all the stations you need.

Add Station using Groups from another Department
1. **Enter 6 digit number** of the other department
2. **Click "Go" button.** [Go]   This will take you to another page, where you will add as many groups from the other department as you wish.
3. **Now you are on the "Route Details: Other Department's Groups" page.** Please follow the next set of instructions below.
    a. **Select group.** These are all the groups in the other department.
    b. **Select position.** This lets you put the new station in any place along the route. If you do not make a selection, the station will be added onto the end.
    c. **Click "Add" button.** [Add]   This will add the station to your route, and you will remain on this page.
    d. **Repeat steps 1-3** on this page until you have added all the groups from the other department that you need.

e. **Click "Route Details" button,** [Route Details] only when you are finished adding groups from the other department. You will return to the Route Details page, where you were building the route initially.

Change Position of Station
1. **Click up / down arrows.** ⬆ ⬇ Up / down arrows have been provided to make modifications to route order easier. They will move a station one stop in either direction.

Delete Station
1. **Click "Delete" icon.** ✖ This removes the station entirely from the route. You will not be able to delete a stop/station if a document is in someone's inbox on that station.

Add Next Route
1. **Enter 6 digit number** of the next route's owning department. You may add only one route onto this one, but it can be from your department or another.
2. **Click "Go" button.** [Go] This will take you to another page, where you will select the route.
3. **Now you are on the "Route Details: Add Next Route" page**. Please follow the next set of instructions below.
    a. **Select route**. These are all the routes in the department.
    b. **Click "Add" button**. [Add] This will add the selected route (as the final station) to the end of your route, and return you to the main "Route Details" page.

Route Details
Dept: 213100 - Finance Commun and Training
Name: Training Route
Route Type : Normal
Please click here to modify route options

Existing Stations:

		Station	Group	Delete	(switch)	Transfers	Approval Conditions
S	Source: Web Travel Subsystem						
●		1	Test Group			0	0
—	This marks the end of the Route.						

Add Stations:

Select Group: [Select a Station here ... ▾] and/or Position : [Select a Position here ... ▾]
and click button [Add]

Add Stations using Groups from another Department:
Enter other Department # and click button to go to appropriate page.
Enter: [   ] Or Select: [213100 - Finance Commun and Training ▾] [Go]

Add Next Route:
Enter Department # and click button to go to appropriate page.
Enter: [   ] Or Select: [213010 - AVC Finance ▾] [Go]

Add Transfer Overrides
1. **Choose the station** at which you want to create a Transfer Override.
2. **Click quantity** of Transfer Overrides listed in the table for that station already (for example, 0)
3. **Now you are on the "Route Details: Transfer Overrides" page.**

Approval Conditions

"Approval conditions" are used to determine if documents should stop at a station or not. This depends on the rules set on that station. For example, you want Group X to approve documents only when they are for less than $100. So, on Group X's station, you create an Approval Condition with the rule "If FRS dollar amount is less than 100" so that Group X is bypassed unless the rule is true. Then, if a document for $500 came through, Group X would not approve it since the condition was false.

Add Approval Conditions
1. **Choose the station** at which you want to create an Approval Condition
2. **Click quantity** of Approval Conditions listed in the table for that station already (for example, 0)
3. **Now you are on the "Route Details: Approval Conditions" page.**

Create a New Approval Condition
1. **Click "Add condition" button.** **Add Condition**   This will take you to the Route Details: Approval Conditions: Rules" page.

Modify an Approval Condition
1. **Click "Modify" icon.** **Modify**   This will take you to the "Route Details: Approval Conditions: Rules" page, where the Approval Condition was created.

Delete an Approval Condition
1. **Click "Delete" icon.** ⊗ Once you click the button, the Approval Condition and its rules will be removed.

Switch Order
1. **Click up/down arrows.** ⤴ ⤵ These arrows move the Approval Condition one step in either direction.

Route Details   (This button always returns you to the main Route Details page.)

Approval Condition Rules
If you have 2 or more approval conditions under one group, the formula will be Rule 1 AND Rule 2. There is no limit to the number of approval conditions.

Add Rules
1. **Select Override Criteria.**
2. **Select Comparison.**
3. **Enter Value.**
4. **Click "Add Rule" Button.** **Add Rule**

Delete Rules
1. **Click "Delete" icon.** ⊗ This removes the rule from the Approval Condition.

List Overrides   Returns you to the "Route Details: Approval Conditions: page.
Route Details   Return you to the main "Route Details" page.

Change Route Options
1. **Click existing route options** listed under the title of the page, or scroll down until you see the Route Options table.
2. **Change any of the 4 options** in the Route Options table.
3. **Click "Modify" button.** [Modify] This will save any changes you made to the Route Options.

List Group Members
1. **Click Name** of group in the route table. A small window will open with a list of the members in that group.

Transfer Overrides

This page lists all Transfer Overrides on this station. Each Transfer Override is made up of a set of rules – if the rules apply, documents will be transferred to the overriding route instead of delivered to this station.

Create a New Transfer Override
1. **Click "Add Transfer Override" button.** [Add Transfer] This will take you to the "Route Details: Transfer Overrides: Rules" page, where you will select the overriding route and add rules to create the Transfer Override.

Modify a Transfer Override
1. **Click "Modify" icon.** [Modify] This will take you to the "Route Details: Transfer Overrides: Rules" page, where the Transfer Override was created.

Delete a Transfer Override
1. **Click "Delete" icon.** ⊗ Once you click the button, the Transfer Override and its rules will be removed.

Switch Order
1. **Click up/down arrows.** ↗ ↘ These arrows move the Transfer Override one step in either direction. The Transfer Overrides will be evaluated in this order.

[Route Details] Click Route Details to return to the main Route Details page.

Transfer Overrides: Rules
   A single Transfer Override may have many rules. All of the rules must be true for the transfer to occur.

Select Overriding Route
1. **Select route from dropdown box.** The overriding route is the one this route will transfer to. Since you can only transfer to a route with the same ordering option (i.e. Unordered to Unordered, and Ordered to Ordered), only the routes that are the same will be in the dropdown box.

Selecting Overriding Route from another Department

1. **Find the footnote** at the bottom of the screen.
2. **Enter department number** of the other department that owns route you want to select.
3. **Click "Go" button** [Go] at the bottom of the screen.
4. **The other department's route will fill the original "Overriding Route" dropdown box.**
   Only the routes from that department that are the same ordering option will appear.
5. **Select the route you want.**

Add Rules

1. **Select Override Criteria.**
2. **Select Comparison**
<=	- Less than or equal to
<	- Less than
=	- Equal to
<>	- Not equal to
>=	- Greater than or equal to
>	- Greater than
= (text)	- Equals text data (i.e. a last name)
3. **Enter Value.**
4. **Click "Add Rule" button.** [Add Rule]

Delete Rules

1. **Click "Delete" icon.** 🔵 This removes the rule from the Transfer Override.

[List Overrides] Returns you to the "Route Details: Transfer Overrides" page.
[Route Details] Returns you to the main "Route Details" page.

Order and Procedure

1. Transfer Overrides will take precedence over Approval Conditions that are on the same Station.
2. All Transfer Overrides or Approval Conditions will be applied in the order they are listed here.
3. Stations with Approval Conditions will be skipped unless those Conditions are met.

Modify an Existing Route

Menu

Options:

Introduction
Inbox
Subsystems: Create Modify Add to Dept. Busn Rules
Groups: Create Modify
Routes: Create **Modify**
Add Pers Info
Help

Choose "Modify" from Routes section of the menu.

1. **Select Department.** This is the department that owns the route. Your department number is selected by default, but you can create routes for any department that rolls up to your department on the UNC Organization database.
2. **Please wait**...for the list of subsystems used by the department to load into the next dropdown box.
3. **Select Subsystem**, which will be the source of documents that use this route.
4. **Please wait**...for the Routes used by this department and subsystem to load.
5. **Select Route.**
6. **Click "Modify" button.** Modify

Flexible Routing
of Electronic Documents   THE UNIVERSITY *of* NORTH CAROLINA *at* CHAPEL HILL

Routes

Modify Route:

1.	**Department:**	**Enter:** [ ] **Or Select:**	213100 - Finance Commun and Training ⌄
2.	Please wait for Subsystems to load ...		
3.	Select **Subsystem:**	Web Travel (as User) ⌄	
4.	Please wait for Routes to load ...		
5.	Select **Route:**	Training Route ⌄	
6.	Click button to modify route on Route Details page:	**Modify**	

The System displays the Route Details page, where you can modify the route.