HOW TO SET UP YOUR PROFILE

You can change, confirm and update your user settings in your profile settings. To access this section of E-Travel, go to Profile > Profile Settings.

We recommend that you go through each element on the left of your Profile Options in order to validate the information. You will find here some of the information that is important for you to update in your profile.
Your information

Personal information
Verify that all the information already filled out (in grey) is correct. You cannot change this information, so contact your e-travel@uottawa.ca if something is incorrect.

Note: It is not mandatory to provide personal information such as your home number or information of your travel passport. You will notice that we have entered the university phone number in the Home Phone field since this field is mandatory.

Email Address
Ensure that you validate at least one email address. To do this, press the Verify button. An email will be sent with a code that you can then enter in the appropriate box.

If you validate more than one email address, you can decide which one you prefer to receive emails notification.

Request settings
Add a FOAP in your profile
Review the information in Request Information. This is where you can enter a default fund, organization and program (FOAP). You can always change your FOAP when you are creating a new request.

Add the BANNER ID
It is imperative that you select a Banner ID that matches your faculty or Service Compliance Officer’s Banner ID. This information is necessary in order for your request or your expense claim to be automatically entered in the Financial System to issue a payment.
Add a delegate

In the Request Delegate section, you can assign a person as your delegate. This person will be able to act on your behalf to prepare and submit requests. The user can be assigned only to tasks that they are allowed to perform.

NOTE: Delegates can’t submit a document, they can only prepare them, once the documents ready to be submit, they will notify you that you can now go in the system and submit your document.

The Delegate For tab lets you see who you are a delegate for and the permissions you have been given.

**Note:** Expenses and requests share delegates. By assigning permissions to a delegate, you are assigning permissions for both expenses and requests.

- Click the **Add** button.
- Use the search field to find the person you wish to assign as your delegate.
- When their name appears, click on it. Their name will now appear in the box.
- Check the boxes that describe the permissions you are giving to the delegate. These are the activities they can do on your behalf.
- Click **Save**.

**Note:** You can assign multiple delegates, each with different responsibilities.

**Email notification preferences**

**Email notifications for Request**

Request Preferences is where you can select when to receive email notifications. Under Prompt..., you can check “For an approver when a request is submitted” to be prompted to choose the appropriate approver when submitting a request.
Email notification for Expenses Claims

Expense Preferences is where you can select when to receive email notifications. Under Prompt..., you can check “For an approver when an expense report is submitted” to be prompted to choose the appropriate approver when submitting an expense report.

Approvers’ settings

Approvers for request and for expenses claims
If your documents will always go to the same approver, you can set up a Default Approver (See letter A). Begin typing the name of your supervisor in the blank field and you will see their email address. Click on it to create your default approver.

Approbateur 2 par défaut (voir lettre B ci-dessous) : Nous avons également ajouté un espace pour entrer un deuxième approbateur par défaut. Cette option peut être utilisée dans le cas où une autre personne que vous ou votre superviseur est le gestionnaire des fonds utilisés.
**Note:** Under the Expense Approvers section, you must put your immediate supervisor as Default approver, your fund manager as Default approver 2 and it is not necessary to add a cash advance approver because all cash advance will be automatically sent to your compliance agent once your request is approved.