Adding the T&E Module to MyWings

1. Email Financial Systems (banner-finance@unf.edu) to grant you T&E access.
   a. In the email include the following:
      i. N#
      ii. Supervisor- Y or N
      iii. Does someone other than you initiate travel authorizations and travel reimbursements on your behalf? If yes, please include the following information:
         1. Delegate N#
            *Note: Financial Systems will e-mail you once the appropriate roles have been assigned to you.

2. Sign in to MyWings.unf.edu and open the Staff tab.
3. To the top right hand corner, press the ‘Customize’ button.

4. Select the ‘Staff’ tab.
5. Under the ‘Staff’ tab, select ‘New Channel’.
6. Select ‘Other’ from the drop down and then select the ‘Go’ button.
7. Highlight the ‘Travel & Expenses’ channel and select ‘Add Channel’ at the right side of the page.

Adding the Worklist Module to MyWings

1. Repeat steps 2-5 from “Adding the T&E Module to MyWings”
2. Instead of selecting ‘Other’, select ‘Applications’. Then select the ‘Go’ button.
3. Highlight the ‘My Worklist’ channel and select ‘Add Channel’ to the right side of the page.
4. Then select ‘Return to Staff tab’ located at the top of the page.

Setting Up a T&E Profile:

1. Under the ‘Travel and Expense’ section, click the ‘Travel and Expense’ link.
2. Then another window will open.
3. To set up your profile, click on the Profile Tab at the top on the left side.

4. Input your information by clicking the edit buttons on the right side of each field.
**Note:** In the ‘Workflow Login ID’ field, input your N#. The Workflow Login ID field needs to be completed in the profile (for everyone) so the delegate or the traveler can submit the TA.

**Note:** In the ‘Funding Default’ field, just input the ‘Chart’ (U) and the ‘Index’ (2XXXXX). Everything else will be generated in a batch process that is uploaded each night.

**Setting Up a Delegate:**

1. Once you have set up your profile, on the ‘Profile’ tab to the left side, click the ‘Assign Delegate’ link.

2. On the bottom of the screen to the right, click on the ‘Add Delegate’ button.
3. A little pop-up box will open for the addition of a delegate(s). You can search by the First or Last Name or Banner ID of the delegate by clicking ‘Advanced Search’. Once you add the delegate(s), press select and then close the box.

You have now successfully set up your profile!
**TERMS & NOTES:**

**Approvers:** Your current supervisor.

*NOTE:* The approver could be changed at any time by a delegate or traveler, but a person is only allowed one (1) approver at a time.

**Delegates:** The person that you assign to do your TA or TR. You are allowed to have more than one (>1) delegate.

**Profile:** Certain identifiers needed to create a TA or TR.

*NOTE:* All aspects of the profile must be completed in its entirety to submit a TA. These include:
- Address or Direct Deposit
- Email
- Approver
- Workflow Login ID
- Funding Default

**Proxy (ies):** An individual who can approve TAs and TRs on behalf of someone else. To create a proxy, an email must be sent to financial systems, banner-finance@unf.edu. (Read step 1 in ‘Adding the T&E Module to MyWings’)