

Duke@Work Security Tab – Travel Initiators

Overview

Using the Duke@Work Security Tab, SAP Security Administrators can take the following actions:

- Grant an employee rights as a travel initiator which allows the initiator to create expense reports on behalf of other Duke employees.
 - Initiators can be given rights to create expense reports for all employees in an organizational unit (org unit access); or
 - Initiators can be given rights to a specific list of employees (Duke Unique ID access).
- Remove an employee's rights as a travel initiator.
- Change an employee's rights from org unit access to Duke Unique ID access.
- Change an employee's rights from Duke Unique ID access to org unit access.
- Add organizational units or specific employees accessible to an initiator.

On the travel tab, color coding is used to better explain the action being taken as outlined below:

- Org unit highlighted in dark blue on the organizational unit tab – Eligible org unit that is being requested (will workflow and requires approval for it to be available to assign to an initiator).
- Org unit highlighted in gold on the organizational unit tab – Ineligible org unit that is being requested (will workflow and requires approval for it to be available to assign to an initiator).
- Org unit/NetID of newly added employee highlighted in light green on the travel tab – org unit/NetID being added to the initiator (will workflow and requires approval for it to be added to the initiator).
- NetID access highlighted in light purple on the travel tab – a person was added as a request and then removed during editing of the current request. If the tab is saved, closed, and reopened, the information and purple highlighting will no longer display.

Duke@Work Security Tab – Travel Initiators

Points to Remember

- All employees (including student employees) have access to create their own expense reports. No action is required by the department.
- Initiators can either have org unit access or Duke Unique ID access. The initiator cannot have both simultaneously.
- If a travel initiator is given org unit access to create expense reports and also has a payroll role assigned to his/her position, the initiator will see payroll data for all employees in all organizational units assigned to them. Be aware of this access to confidential information. If this access creates problems within the department, the initiator will need to be given Duke Unique ID access.
- If an initiator has org unit access, the access applies to all organizational units assigned to the position.
 - Ex. If an initiator has three organizational units assigned, he/she cannot be given rights to create travel expense reports for just one of the organizational units.
- Org Unit access is position based.
- Duke Unique ID access ties to the person. When hires occur new access will need to be established. When transfers occur, access will need to be stopped.

Duke@Work Security Tab – Travel Initiators

Grant Travel Rights – New

Follow the steps outlined below to establish rights for an employee.

1. Log into Duke@Work – work.duke.edu and go to the “Security Admin” tab.
2. Enter in the name of the employee who will be given access as a travel initiator, click “Go”. Once the employee’s name displays, click the hyperlink associated with the employee’s Duke Unique ID.

The screenshot shows the Duke@Work Security Admin interface. The top navigation bar includes tabs like Home, iForms, Grants Management, MyInfo, Universal Worklist, Candidate Selection, Buy@Duke, Finance, MyResearch, Budget, Security Admin, and ECRT. The Security Admin tab is active, and the sub-tab is Non-Employee. The main content area has a left sidebar with a 'Detailed Navigation' pane. The main form is titled 'Security Views: Security Employee Search'. It contains input fields for 'Personnel No.', 'Last Name: brock', and 'First Name: kimberly'. A red circle highlights the 'Go' button, and a red arrow points to it. To the right, a table displays search results. The first row shows 'KIMBERLY C BROCK' with a unique ID '00104206' circled in red. Other columns include Position (0016184), PYA (UM), Personnel Subarea Text (EXEMPT), Org Key (DDGV), Status (A), and My EE (Y). At the bottom right, it says 'Data as of 1/23/2015, 1:00:34 PM' with a 'Refresh' link.

Employee	ID	Position	PYA	Personnel Subarea Text	Org Key	Status	My EE
KIMBERLY C BROCK	00104206	0016184	UM	EXEMPT	DDGV	A	Y

3. Once the security page opens, select “Edit”.

The screenshot shows the Duke@Work Security Admin interface after clicking 'Go'. The top navigation bar is the same. The main content area shows the 'Employee: _____, Position: _____, User ID: _____' and 'Org Info: _____'. Below this, there are three buttons: 'Un Hire', 'Edit', and 'Change History'. The 'Edit' button is circled in red. At the bottom, there are several tabs: Financials, Procurement, HR/Payroll, Organizational Unit, Workflow Approvals, and Special Assignment.

****Please note: prior to selecting “Edit”, data is only being “displayed”; therefore, the “Travel” tab is not displayed since this person is not currently an initiator.

Duke@Work Security Tab – Travel Initiators

Grant Travel Rights – New (continued)

- Select the “Travel Tab”. Notice the first two sections, “Initiator For Org” and “Initiator For Pernr”.

Initiator For Org					Initiator For Pernr				Travel	Department Thresholds		
Org Unit	DESCRIPTION	Abbreviation	Count		Employee	Pers No	Position	Description	ROLES	Begin Date	End Date	Desi
<input type="checkbox"/> 50000276	Provost	V	13,653	▶	<input type="checkbox"/>	00000000	00000000		<input type="checkbox"/> FI - Change Card Transaction Owner	The table does not contain		
<input type="checkbox"/> 50541052	DUKE GLOBAL	14	0	▶					<input type="checkbox"/> FI - OSP Travel Document Display			
<input type="checkbox"/> 50960738	DKU ALLMO - Provost	9108109000	0	▶					<input type="checkbox"/> FI - Travel Department			
<input type="checkbox"/> 50960739	DKU ALLMO - Global Health	9160508528	0	▶					<input type="checkbox"/> FI - Travel Management			
<input type="checkbox"/> 50960740	DKU JULDEC - Provost	9208109000	0	▶					<input type="checkbox"/> FI - Travel Supervisor			
<input type="checkbox"/> 50960741	DKU JULDEC - Medical Physics	9260251000	0	▶					<input type="checkbox"/> FI - Travel End User			
<input type="checkbox"/> 50960742	DKU JULDEC - Fuqua	9232000000	0	▶					<input type="checkbox"/> FI - Traveller			
<input type="checkbox"/> 50960743	DKU JANJUN - Provost	9308109000	0	▶					<input type="checkbox"/> FI - Confidential Travel			
<input type="checkbox"/> 50960744	DKU JANJUN - Medical Physics	9360251000	0	▶					<input type="checkbox"/> FI - Confidential Travel - Display			
<input type="checkbox"/> 50960745	DKU JANJUN - Fuqua	9332000000	0	▶					<input type="checkbox"/> FI - Travel Receipts View			

- If establishing org unit access, “check” the white box beside the first organizational unit listed. This will automatically highlight in green all the organizational units associated with the initiator. Remember: Access must be given to **ALL** the organizational units assigned to the position. If the initiator needs access to additional organizational units, go to the “Organizational Unit” tab and request access to the appropriate organizational units.

Initiator For Org					Initiator For Pernr			
Org Unit	DESCRIPTION	Abbreviation	Count		Employee	Pers No	Position	
<input checked="" type="checkbox"/> 50000276	Provost	V	13,653	▶	<input type="checkbox"/>	00000000	00000000	
<input checked="" type="checkbox"/> 50541052	DUKE GLOBAL	14	0	▶				
<input checked="" type="checkbox"/> 50960738	DKU ALLMO - Provost	9108109000	0	▶				
<input checked="" type="checkbox"/> 50960739	DKU ALLMO - Global Health	9160508528	0	▶				

Duke@Work Security Tab – Travel Initiators

Grant Travel Rights – New (continued)

- If establishing Duke Unique ID access, enter the Duke Unique ID for the employee who should be assigned to this initiator. Once the Duke Unique ID is in the box, select “Enter” on the keyboard and the employee’s name will appear.

****Notice a search box is available when the mouse is placed on the right side of the Pers. No box. If the Duke Unique ID is not available, search for the person by name. Remember that an * is a wildcard for searches in SAP and may be helpful when searching for an employee by name.

The screenshot shows the 'Initiator For Pernr' screen with the following data:

Employee	Pers No	Position	Description
<input type="checkbox"/>	0024129	<input type="checkbox"/> 0000000	

The 'All Values: Personnel Number' dialog is open, showing the search criteria 'Employee/app.name' and a search box. A red arrow points from the 'Position' field in the main screen to the search box in the dialog.

- Continue adding Duke Unique IDs until all appropriate employees have been added to the initiator. The checked box indicates this person is going to be added. If a person is added in error, uncheck the box beside the employee’s name.

The screenshot shows the 'Initiator For Pernr' screen with the following data:

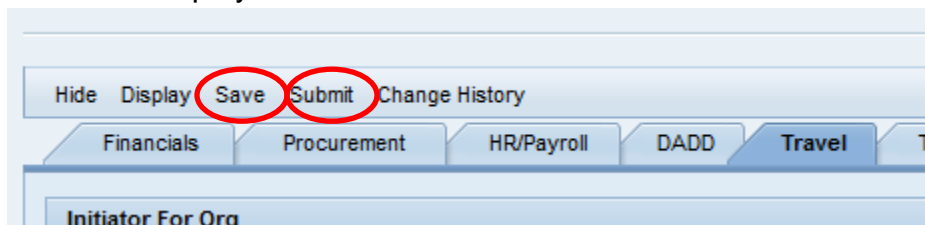
Employee	Pers No	Position	Description
<input checked="" type="checkbox"/> BARBARA R HOLBROOK	00107799	50021177	DIR, EMPLOYEE TRAVEL & RE
<input checked="" type="checkbox"/> GWENDOLYN K HALL-DIFABIO	00024129	50391005	DIR, FINANCIAL TRAINING
<input checked="" type="checkbox"/> KIMBERLY C BROCK	00104206	50016184	SR MGR, IT
<input type="checkbox"/> KRISTIN A BUREL	00622489	50034341	TRAINING REP
<input type="checkbox"/>	00000000	00000000	

A red circle highlights the checkboxes in the 'Employee' column.

Duke@Work Security Tab – Travel Initiators

Grant Travel Rights – New (continued)

8. When the appropriate access has been added to the initiator, either “Save” the information to review and/or submit later or “Submit” the change which will both save and submit the changes into workflow for approval. As with all functions in the Security tool, “Submit” will display the workflow associated with the changes being requested. If you would like additional information on viewing workflow in the Security Tool, please watch the [SAP Security Maintenance – Viewing Workflow Video](#) available in Duke’s [Learning Management System](#). Once workflows have routed and are approved, the initiator will be able to create expense reports for either all employees in the org unit(s) requested or by NetID for all the employees listed.



****Please note: As with all workflow in the Security tool, different workflow objects will be approved at different times; therefore, initiators may get access to some employees more quickly than others. For example: If org unit access is being added for three org units the initiator does not have access to, the approval for each org unit will happen individually; therefore, the initiator will get access to each org unit as the approval occurs. Additionally, changes cannot be made to the same user while a previously initiated change is still moving through workflow approval.

Duke@Work Security Tab – Travel Initiators

Change Current Access

Follow the steps outlined below to make changes to established rights for an employee.

1. Log into Duke@Work – work.duke.edu and go to the “Security Admin” tab.
2. Enter in the name of the employee who will be given access as a travel initiator, click “Go”. Once the employee’s name displays, click the hyperlink associated with the employee’s Duke Unique ID.

The screenshot shows the Duke@Work Security Admin interface. The top navigation bar includes tabs for Home, iForms, Grants Management, MyInfo, Universal Worklist, Candidate Selection, Buy@Duke, Finance, MyResearch, Budget, Security Admin, and ECRT. The Security Admin tab is active, and the sub-tab is Department Reports | Non-Employee. The main content area is titled Security Views and includes a Detailed Navigation pane on the left. The Security Views dropdown is set to Security Employee Search. The form contains fields for Personnel No., Last Name (brock), and First Name (kimberly). A red arrow points to the Go button, which is circled in red. To the right, a table displays the search results for Kimberly C Brock, with the Duke Unique ID 00104206 circled in red. The table has columns for Employee, ID, Position, PYA, Personnel Subarea Text, Org Key, Status, and My EE. The data row shows KIMBERLY C BROCK, 00104206, 50016184, UM, EXEMPT, DDGV, A, and Y. The bottom of the page shows the date and time as 1/23/2015, 1:00:34 PM, and a Refresh link.

Employee	ID	Position	PYA	Personnel Subarea Text	Org Key	Status	My EE
KIMBERLY C BROCK	00104206	50016184	UM	EXEMPT	DDGV	A	Y

3. Once the security page opens, select “Edit”.

The screenshot shows the Duke@Work Security Admin interface. The top navigation bar includes tabs for Home, iForms, Grants Management, MyInfo, Universal Worklist, Candidate Selection, Buy@Duke, Finance, MyResearch, Budget, Security Admin, and ECRT. The Security Admin tab is active, and the sub-tab is Department Reports | Non-Employee. The main content area is titled Security Views and includes a Detailed Navigation pane on the left. The Security Views dropdown is set to Security Employee Search. The form contains fields for Personnel No., Last Name (brock), and First Name (kimberly). A red arrow points to the Go button, which is circled in red. To the right, a table displays the search results for Kimberly C Brock, with the Duke Unique ID 00104206 circled in red. The table has columns for Employee, ID, Position, PYA, Personnel Subarea Text, Org Key, Status, and My EE. The data row shows KIMBERLY C BROCK, 00104206, 50016184, UM, EXEMPT, DDGV, A, and Y. The bottom of the page shows the date and time as 1/23/2015, 1:00:34 PM, and a Refresh link.

Employee	ID	Position	PYA	Personnel Subarea Text	Org Key	Status	My EE
KIMBERLY C BROCK	00104206	50016184	UM	EXEMPT	DDGV	A	Y

Duke@Work Security Tab – Travel Initiators

Change Current Access (continued)

- Select the “Travel Tab”. Notice the first two sections, “Initiator for Org” and “Initiator for Pernr”. The current initiator access can be determined by looking at the checkbox display. A checked box beside an org unit in the “Initiator for Org” section or a checked box beside a person in the “Initiator for Pernr” section indicates whether the initiator has org unit or NetID access.

Initiator For Org					Initiator For Pernr	
Org Unit	DESCRIPTION	Abbreviation	Count		Employee	Pers No
<input type="checkbox"/> 50233626	PAS Adm - Global Education Office	6008103500	23	▶	<input checked="" type="checkbox"/> KAREN PRICE	00002843
<input type="checkbox"/> 50383434	Duke Engage	6008550000	48	▶	<input checked="" type="checkbox"/> JOHN G CACCAVALE	00008912
<input type="checkbox"/> 50633284	PAS Adm - DOCE	6008108500	6	▶	<input checked="" type="checkbox"/> KIMBERLY J JENKINS	00020223
					<input checked="" type="checkbox"/> CHRISTOPHER GERGEN	00023094

- To change from UniqueID access to org unit access, select the white check box that corresponds to the first org unit listed. Selecting this check box will automatically “uncheck” all the names listed under the “Initiator for Pernr” section.

****Please note: Once the boxes beside a list of employees is “unchecked” the box beside each employee has to be “checked” one at a time in order to reestablish UniqueID access.

Initiator For Org					Initiator For Pernr			
Org Unit	DESCRIPTION	Abbreviation	Count		Employee	Pers No	Position	Description
<input checked="" type="checkbox"/> 50233626	PAS Adm - Global Education Office	6008103500	23	▶	<input type="checkbox"/> KAREN PRICE	00002843	50635046	INSTRUCTOR, (P-T)/UNIV
<input checked="" type="checkbox"/> 50383434	Duke Engage	6008550000	48	▶	<input type="checkbox"/> JOHN G CACCAVALE	00008912	50607667	EXECUTIVE IN RESIDENCE
<input checked="" type="checkbox"/> 50633284	PAS Adm - DOCE	6008108500	6	▶	<input type="checkbox"/> KIMBERLY J JENKINS	00020223	50009303	VISITING INSTRUCTOR
					<input type="checkbox"/> CHRISTOPHER GERGEN	00023094	50926526	VISITING ASSOCIATE PROF
					<input type="checkbox"/> BETTY B COWAN	00026138	50340740	STAFF SPECIALIST

OR

Duke@Work Security Tab – Travel Initiators

Change Current Access (continued)

To remove initiator access for specific employees, “uncheck” the box beside the names of the employees whom the initiator should no longer access in the online expense report tool.

Initiator For Pernr			
Employee	Pers No	Position	Description
<input type="checkbox"/> KAREN PRICE	00002843	50635046	INSTRUCTOR, (P-TY)UNIV
<input type="checkbox"/> JOHN G CACCAVALE	00008912	50607667	EXECUTIVE IN RESIDENCE
<input checked="" type="checkbox"/> KIMBERLY J JENKINS	00020223	50009303	VISITING INSTRUCTOR
<input checked="" type="checkbox"/> CHRISTOPHER GERGEN	00023094	50926526	VISITING ASSOCIATE PROF
<input checked="" type="checkbox"/> BETTY B COWAN	00026138	50340740	STAFF SPECIALIST
<input checked="" type="checkbox"/> KATHERINE MCKINNEY	00027891	99999999	Integration: default posi

OR

To change from org unit access to NetID Access, enter in the Duke Unique ID of an employee whom the initiator will access.

Initiator For Org			
Org Unit	DESCRIPTION	Abbreviation	Count
<input checked="" type="checkbox"/> 50000845	Medicine - General	6860201510	41
<input checked="" type="checkbox"/> 50000846	Medicine - CME Program	6860201513	0
<input checked="" type="checkbox"/> 50000847	Medicine - Cardiology	6860201515	352
<input checked="" type="checkbox"/> 50000848	Medicine-Cardiology Data Bank	6860201517	0
<input checked="" type="checkbox"/> 50000850	Medicine-Endocrinology and Metabolism	6860201525	84

Initiator For Pernr			
Employee	Pers No	Position	Description
<input type="checkbox"/>	0024128	00000000	

All Values: Personnel Number

Search Criteria

Employee/app.name:

☒ Restrict Number of Value List Entries To

Duke@Work Security Tab – Travel Initiators

Change Current Access (continued)

Once the employee's Duke Unique ID is in the box, select "Enter" on the keyboard. The employee's name will appear and the box beside the name will be "checked". The box beside the org units listed will be automatically "uncheck" changing the initiators access from org unit to Duke Unique ID. Continue adding DUIDs until all appropriate employees have been added to the initiator.

Initiator For Org				Initiator For Pernr					
Org Unit	DESCRIPTION	Abbreviation	Count	Employee	Pers No	Position	Description		
<input type="checkbox"/>	50000845	Medicine - General	6860201510	41	<input checked="" type="checkbox"/>	GWENDOLYN K HALL-DIFABIO	00024129	50391005	DIR, FINANCIAL TRAINING
<input type="checkbox"/>	50000846	Medicine - CME Program	6860201513	0	<input type="checkbox"/>		00000000	00000000	
<input type="checkbox"/>	50000847	Medicine - Cardiology	6860201515	352					
<input type="checkbox"/>	50000848	Medicine-Cardiology Data Bank	6860201517	0					
<input type="checkbox"/>	50000850	Medicine-Endocrinology and Metabolism	6860201525	84					
<input type="checkbox"/>	50000851	Medicine - Bone & Mineral Disorders	6860201529	0					
<input type="checkbox"/>	50000852	General Internal Medicine	6860201530	153					

- When the appropriate access has been added to the initiator, either "Save" the information to review and/or submit later or "Submit" the change which will both save and submit the changes into workflow for approval. As with all functions in the Security tool, "Submit" will display the workflow associated with the changes being requested. If you would like additional information on viewing workflow in the Security Tool, please watch the [SAP Security Maintenance – Viewing Workflow Video](#) available in Duke's [Learning Management System](#). Once workflows have routed and are approved, the initiator will be able to create expense reports for either all employees in the org unit (s) requested or by NetID for all the employees listed.

Hide Display **Save** **Submit** Change History

Financials Procurement HR/Payroll DADD **Travel** T

Initiator For Org

Duke@Work Security Tab – Travel Initiators

Change Current Access (continued)

****Please note: As with all workflow in the Security tool, different workflow objects will be approved at different times; therefore, initiators may get access to some employees more quickly than others. For example: If org unit access is being added for three org units the initiator does not have access to, the approval for each org unit will happen individually; therefore, the initiator will get access to each org unit as the approval occurs. Additionally, changes cannot be made to the same user while a previously initiated change is still moving through workflow approval.

Duke@Work Security Tab – Travel Initiators

Delete Initiator Access

Follow the steps outlined below to remove rights for an employee.

1. Log into Duke@Work – work.duke.edu and go to the “Security Admin” tab.
2. Enter in the name of the employee who will be given access as a travel initiator, click “Go”. Once the employee’s name displays, click the hyperlink associated with the employee’s Duke Unique ID.

The screenshot shows the Duke@Work Security Admin interface. The top navigation bar includes tabs for Home, iForms, Grants Management, MyInfo, Universal Worklist, Candidate Selection, Buy@Duke, Finance, MyResearch, Budget, Security Admin, and ECRT. The Security Admin tab is active, and the sub-tab is Department Reports | Non-Employee. The main content area is titled Security Views and contains a search form. The search form has fields for Last Name (brock) and First Name (kimberly), and a Go button. A red arrow points to the Go button. Below the search form is a table with columns: Employee, ID, Position, PYA, Personnel Subarea Text, Org Key, Status, and My EE. The table contains one row for KIMBERLY C BROCK with ID 00104206. The ID 00104206 is circled in red. The bottom of the page shows the date and time: Data as of 1/23/2015, 1:00:34 PM, and a Refresh link.

Employee	ID	Position	PYA	Personnel Subarea Text	Org Key	Status	My EE
KIMBERLY C BROCK	00104206	0016184	UM	EXEMPT	DDGV	A	Y

3. Once the security page opens, select “Edit”.

The screenshot shows the Duke@Work Security Admin interface. The top navigation bar includes tabs for Home, iForms, Grants Management, MyInfo, Universal Worklist, Candidate Selection, Buy@Duke, Finance, MyResearch, Budget, Security Admin, and ECRT. The Security Admin tab is active, and the sub-tab is Department Reports | Non-Employee. The main content area is titled Security Views and contains a search form. The search form has fields for Last Name (brock) and First Name (kimberly), and a Go button. A red arrow points to the Go button. Below the search form is a table with columns: Employee, ID, Position, PYA, Personnel Subarea Text, Org Key, Status, and My EE. The table contains one row for KIMBERLY C BROCK with ID 00104206. The ID 00104206 is circled in red. The bottom of the page shows the date and time: Data as of 1/23/2015, 1:00:34 PM, and a Refresh link.

Employee	ID	Position	PYA	Personnel Subarea Text	Org Key	Status	My EE
KIMBERLY C BROCK	00104206	0016184	UM	EXEMPT	DDGV	A	Y

Duke@Work Security Tab – Travel Initiators

Delete Initiator Access (continued)

4. Select the “Travel Tab”. Notice the first two sections, “Initiator for Org” and “Initiator for Pernr”. “Uncheck” the boxes under either the “Initiator for Org” or the “Initiator for Pernr” section determined by the initiator’s access. All initiator access has been removed when no boxes are checked in either the “Initiator for Org” or the “Initiator for Pernr” sections.

Initiator For Org				Initiator For Pernr			
Org Unit	DESCRIPTION	Abbreviation	Count	Employee	Pers No	Position	Description
<input type="checkbox"/> 5000845	Medicine - General	6860201510	41	<input type="checkbox"/> GWENDOLYN K HALL-DIFABIO	00024129	50391005	DIR, FINANCIAL TRAINING
<input type="checkbox"/> 5000846	Medicine - CME Program	6860201513	0	<input type="checkbox"/>	00000000	00000000	
<input type="checkbox"/> 5000847	Medicine - Cardiolnov	6860201515	352				

5. When the appropriate access has been deleted from the initiator, either “Save” the information to review and/or submit later or “Submit” the change which will both save and submit the changes into workflow for approval. As with all functions in the Security tool, “Submit” will display the workflow associated with the changes being requested. If you would like additional information on viewing workflow in the Security Tool, please watch the [SAP Security Maintenance – Viewing Workflow Video](#) available in Duke’s [Learning Management System](#). Once workflows have routed and are approved, the initiator will no longer be able to create expense reports for other Duke employees.

Hide Display **Save** **Submit** Change History

Financials Procurement HR/Payroll DADD **Travel** Te

Initiator For Org