Help for Administration: Move Multiple Users

Updated 12/19/2023 02:06 PM | Answer ID 4729

As an E2 administrator, what do I need to know about the Move Multiple Users feature?

The Move Multiple Users feature allows administrators (with admin access at the major customer level and permission to create/edit all users or a selected user type) the ability to move multiple users from one minor customer to another existing minor customer with one action.

The following steps provide a basic outline of the Move Multiple Users process. Use the links to access more detailed information.

***TIP**: Refer to the* AG10: Administer Users *administrator guide for even further detail, including screen shots.*

1. Click **Administration** on the task bar.
2. Click the **Move Multiple Users** link in the Administer Users section of the Administration Options menu. This displays the Step 1: Move Users From Minor Customer page.
3. Select the minor customer from which users will be moved and click the **Search** button.
4. Select the users to be moved and then click the **Next Step** button to continue.
5. On the Step 2: Move Users To Minor Customer page, select the minor customer to which users will be moved and then click the **Next Step** button to continue.
6. On the Step 3: Move Multiple Users Adjustments page, select one or both of the check boxes, or leave both check boxes blank if they are not applicable to your situation, and then click the **Next Step** button to continue.
7. On the Step 4: Move Multiple Users Review page, review the information displayed on the page and then click the **Move Users** button. This displays a Confirm Action window.
8. Review the information in the window and click the **Confirm** button. The users are moved and the Step 5: Move Multiple Users Summary page displays.
9. Review the summary information and then click the **Done** button at the bottom of the page when you are finished.

RULES AND BEST PRACTICES

When you move users to a new minor customer, the following rules and best practices apply.

Routing

- You can move a user that has open documents. All documents use routing information from the minor customer to which the traveler belonged when the document was created.
- Review approval routing for those users you are planning to move both before and after the move to ensure it is correct and meets your group's travel policies
  - If you are not removing user applied routing, individually applied templates and routing rules will continue to apply to all of the user's documents, regardless of the minor customer for which the document was created.

    - If you are <u>not</u> removing user applied routing, any template applied at the minor customer level and disabled for a user will remain disabled.
- If you choose to remove user applied routing (i.e., the **Remove ALL User Applied Routing from the selected users** check box on the Step 3: Move Multiple Users Adjustments page is selected), any individual routing rules added for a user will be deleted. If trips were already created for the user under the old minor customer, those trips, when sent for approval, will use the default routing for the old minor customer, but will not consider the traveler's individual routing rules as they are now gone.

<u>Reservations</u>

- Differences in E2 online booking tool (OBT) and travel management center (TMC) configurations may require assistance from E2 customer support to complete the move. These differences may also impact the authorization amendment process, and may affect a traveler's ability to modify existing reservations for documents created under the old minor customer.
- Travelers may not be able to book travel for a document created under the old minor customer.
- Travelers may be unable to cancel a trip with an associated reservation if that trip was created under the old minor customer. Travelers may need to contact E2 customer support for assistance in this scenario.

<u>Access Levels</u>

- If you are <u>not</u> reassigning all users to the Traveler user type and document approvers and/or auditors will be included in the move, you should review the approval or audit access level for these users and their other permissions. You may need to remove a user from an approval routing pool or change a user's approval or audit access level.
- If a document is locked to an approver who can no longer approve the document due to insufficient access, an administrator can select another approver from the routing pool to complete the approval step.

<u>Favorite Account Codes</u>

Any favorite account codes saved to the user's profile will still be available in their profile following the move. Any trips started for the traveler in the old minor customer will retain the account codes as entered. The **Select Account Codes** tab in the Account Code Selection window, however, follows the traveler's hierarchy (rather than the hierarchy of the trip document). This means that any favorite account codes saved under the old minor customer will not be available as favorites under the new minor customer. If necessary, you can search for these account codes via the **Search Account Codes** tab (if available).

Glossary: Routing Template

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What is a routing template?

A routing template contains the routing rules that are used to route travel documents for approval in E2. A travel document uses the routing rules that are currently defined for its document type.

ADDITIONAL INFORMATION

Refer to the following answers for more information on working with routing templates.

Basic Functions

- Answer 2233 (*Administration: Delete routing template*)
- Answer 3419 (*Administration: Make changes to routing templates*)
- Answer 4666 (*Administration: Copy routing template*)
- Answer 4673 (*Administration: Create a routing template*)
- Answer 4688 (*Administration: Search for a routing template*)

Routing Rules

- Answer 2231 (*Administration: Delete routing rules from routing template*)
- Answer 2246 (*Administration: Configure a routing rule in a routing template*)
- Answer 4674 (*Administration: Add a routing rule to a routing template*)

Application

- Answer 2562 (*Administration: Add routing template to individual traveler*)
- Answer 4740 (*Administration: Apply a routing template to a minor customer*)

Administration: Apply a routing template to a minor customer

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How do I apply a routing template to a minor customer?

A routing template can be applied to one or more minor customers on the Edit Routing Rule Template page. Complete the following steps.

1. Click **Administration** on the task bar.
2. Click the **Routing Templates** link in the Administration Options menu. This displays the Routing Rule Template Search page.
3. Enter all or part of the name of the template for which you are searching in the **Template Name** field.
4. Click the **Search** button. A list of templates matching your search criteria displays in the search results.
5. Locate the template you are applying to a minor customer in the list and click the name link in the Templates column. This displays the Edit Routing Rule Template page.
6. Select the *Minor Customers to which this template is not applied* option from the **Minor Customer Views** drop-down list in the Minor Customers section.
7. Click the **Show** button. The page refreshes to display all minor customers to which the template has not been applied in the data grid.

   TIP*: If you have a long list of minor customers, enter a few characters of the name (or the entire name) of the minor customer for which you are searching in the* ***Enter text to search*** *field. The list will be automatically filtered to show only those minor customers with that text string in their name.*

8. Select the check box next to each minor customer to which the template should be applied.
9. Click the **Apply Selections** button below the data grid to apply the routing template to the selected minor customer(s).

TIP*: Refer to the* AG20: Approval Routing *administrator guide for more detailed information, including screen shots.*

Troubleshooting: Open Authorization Accounting Errors and Warning Messages

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What errors and warnings display on the Open Authorization Accounting page?

***NOTE**: Additional answers also exist for the error and warning messages you may encounter on the pages and windows associated with the Open Authorization Accounting page: [Account Code Selection](#).*

OPEN AUTHORIZATION ACCOUNTING MESSAGES

Error Messages

The following error messages may display on the Open Authorization Accounting page.

- ***[AMOUNT ALLOCATED] is not a currency value.*** - This error message displays, when you click **Save** or **Save and Next Step**, if the **Amount Allocated** field contains a non-numeric value. The **Amount Allocated** field is a numeric-only field; you must correct the entry to continue.
- ***[PERCENT ALLOCATED] is not a currency value.*** - This error message displays, when you click **Save** or **Save and Next Step**, if the **Percent Allocated** field contains a non-numeric value. The **Percent Allocated** field is a numeric-only field; you must correct the entry to continue.
- ***Expenses are over allocated. Review before proceeding.*** - This error message displays for final approvers, when you click **Save** or **Save and Next Step**, if the total amount is over-allocated. Review and correct the expense allocations to continue.
- ***Expenses are under allocated. Review before proceeding.*** - This error message displays for final approvers, when you click **Save** or **Save and Next Step**, if the total amount is under-allocated. Review and correct the expense allocations to continue.
- ***Please enter only numeric characters in the Amount Allocated fields.*** - This error message displays in a pop-up window, when you click **Save** or **Save and Next Step**, if a non-numeric character was entered in an **Amount Allocated** field. Click **OK** to close the message window, and then correct the entry to continue.
- ***Please enter only numeric characters in the Percent Allocated fields.*** - This error message displays in a pop-up window, when you click **Save** or **Save and Next Step**, if a non-numeric character was entered in a **Percent Allocated** field. Click **OK** to close the message window, and then correct the entry to continue.
- ***The account code [ACCOUNT CODE] already exists in your profile favorite account codes.*** - This error message displays, when you click **Add and Close** in the Add to Favorites drop-down window, if the account code you are trying to add to your favorites is already a favorite. The name given to the favorite account code displays in the Description column in the Open Authorization Accounting page's data grid.
- ***The following Account Codes are not valid: [ACCOUNT CODE]*** - This error message displays, when you click **Save** or **Save and Next Step**, if a selected account code is invalid. Select a valid account code and delete the invalid code.

Warning Messages

The following warning messages may display on the Open Authorization Accounting page.

- ***Account codes are over allocated.*** - This warning message displays for all users (except final approvers), when you click **Save** or **Save and Next Step**, if the total amount is over-allocated. Review and correct the expense allocations to continue.
- ***Account codes are under allocated.*** - This warning message displays for all users (except final approvers), when you click **Save** or **Save and Next Step**, if the total amount is under-allocated. Review and correct the expense allocations to continue.
- ***No account codes selected. Click the 'Select Account Codes' link below to add an account code.*** - This warning message displays when you access the Open Authorization Accounting step if no accounting has been specified. Account codes are not required to complete an open authorization. Select an account code using the **Select Account Codes** link, or leave the Accounting section blank and click **Save and Next Step** to continue.