PeopleSoft
Travel Authorization and Expense System – Workflow Approval

Informational Forum
Overview

• The workflow approval in many cases for non Academic Departments is the HR Supervisor. The Academic areas as noted by the Provost Office may include not only the HR Supervisor, but also the Dean’s office and a Budget Reviewer.

• In the case of international travel on a grant fund, the TA will be routed to Grants and Contracts.

• Supervisors can reassign their Workflow approval to a delegate.

• Notifications of travel requests that require your attention will be sent to you via an email. Note, if you reassign your workflow authority to a delegate, the delegate will receive the email messages.

• You have the option to approve or deny a request as well as to send the request back or place the TA on hold.

• The workflow will route to AAA when the TA requires airfare.
Travel Authorization Notification

A travel authorization request has been submitted that requires your attention:

- **Employee ID:** 390389
- **Employee Name:** Halseth, Jennifer A.
- **Submission Date:** 2015-11-08
- **Travel Auth Description:** Bank of America conference
- **Travel Auth ID:** 000000000001
- **Business Purpose:** Conference
- **Amount Requested:** $8000.00

You can navigate directly to the page for more information by clicking the link below:

https://example.com/travelapproval?ID=123456789

If you are already signed into the database, the link will take you to the Travel Authorization Summary.

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**Travel Authorization Summary**

- **Description:** Bank of America conference
- **Comment:** Calendar Finance
- **Status:** Submitted for Approval
- **Date From:** 12/01/2016
- **To:** 12/07/2016
- **Last Updated:** 12/02/2016
- **By:** [Name]

**Expenses:**

- **Automobile Rental:** $150.00
- **Airfare:** $3000.00
- **Hotel:** $900.00 USD

**Total:** $4050.00 USD

**Last Non Approved:** [Details]
All employees have access to PeopleSoft Financials as they do for PeopleSoft Human Resources. The Travel and Expense application resides in PeopleSoft Financials.
Accessing the Travel Authorization Worklist

Click on the Worklist to review pending travel authorizations that require approval.

Note that the HR Supervisor, Department Reviewers and VP Managers (if required) will be notified of the TA and required to approve the authorization.

For international travel on a grant fund 25 through 30, the TA will route to Grants and Contracts.
Reviewing Your Worklist to Approve Travel Authorizations

Your Worklist will reflect the information noted in the email

Click the link to open the TA
Reviewing the Travel Authorization

Once the TA has been opened, you will be able to review each expense type and details related to each expense type.

The pending actions reflect the workflow routing.
Reviewing the Travel Authorization

**Authorize Travel Authorization**

**Authorization Detail for Airfare_Round Trip (Line 2)**

- Jennifer Halseth
- Authorization ID: 0000000181
- Date From: 11/28/2015 To: 11/30/2016
- About This Expense:
  - Date: 11/28/2016
  - Billing Type: Prepaid Expenditures
  - Ticket Number:
  - Originating Location: Detroit, MI
  - Merchant (Choose One):
    - Preferred: Delta
    - Non-preferred:  
  - Travel To: Orlando, FL
  - Description: conference
  - Amount: 750.00 USD
- Exception Comments
- Location Amount: 
- Accounting Detail
- Approved Authorization
- Return to Travel Authorization Details

**Accounting Detail**

Jennifer Halseth
Authorization ID: 0000000181

This is the accounting detail for expense type Airfare_Round Trip with a transaction date of 2016-11-28 in the amount of 750 USD.

**Accounting Summary**

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<th>Amount</th>
<th>GL Unit</th>
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<td>11</td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

OK
Approving the Travel Authorization

Please note the options available for the Manager or Department Reviewer to approve, send back, place the TA on hold or deny.

Select the appropriate action.
Approving the Travel Authorization

For international air travel allocated to funds 25 to 30, the travel request automatically be routed to Grants and Contracts.

If travel is requested using a grant fund that will expire prior to the date of the travel as noted on the TA, an error message will be reflected indicating the expiration of the project.
Approving the Travel Authorization

If the expense allocation is to a department not associated with traveler’s home cost center, the TA will be routed to the expense manager of the department specified on the TA.

As noted previously, the traveler will be notified that the TA is approved once all approvals have been obtained.
Approving the Travel Authorization