

CREATING A BLANKET TRAVEL AUTHORIZATION

***When creating a blanket authorization, you cannot backdate to a previous date. Please make sure that you make the “Date From” be a date a week in advance of the submit date (NOT the date of submission) to give approvers enough time to approve the authorization.

Creating a blanket travel authorization from an existing authorization makes it easier for the traveler or their delegate by having preselected expense lines. Follow the navigation below to create a new authorization.

(From the PeopleSoft Financials home page)

- 1) Select the “WMU Travel Authorizations” tile
- 2) On the “Create/Modify” screen select the “Add” button

Create a travel authorization using the date range desired for the blanket authorization (see note above for further instruction). Add the expense types that will be commonly used, fill in the necessary details and submit for approval. *** Make sure to add any notes about the blanket travel into the “Notes” link underneath the date range.

ian Trautman ?

*Business Purpose Conference

*Date From 12/01/2017 *Date To 06/30/2018

*Description Bank of America Conference

Notes

Print

Projected Expenses ?

Expand All | Collapse All Add: Quick-Fill

| *Date | *Expense Type | *Description | *Payment Type |
|------------|--------------------|----------------------|----------------------|
| 12/01/2017 | Automobile Mileage | Kalamazoo to Detroit | Personal Credit Card |

*Billing Type REIMBURS

*Originating Location Michigan

*Destination Location Michigan

*Miles 1000 x 0.5350

*Number of Passengers 1

Accounting Details ?

When the traveler knows a trip is coming that falls under that blanket authorization, follow the navigation below to create a new travel authorization and from the “Quick Start” drop down menu at the top left of the authorization select “An Existing Authorization” and select “GO”.

Save for Later | Home | Summary and Submit

Quick Start

...Populate From

...Populate From

A Template

An Existing Authorization

GO

Change the dates to search for a trip if necessary and hit the **“Select”** button on the authorization to use.

- 1) Update the trip dates
- 2) Update any detail information (including the amount if different)
- 3) When travel authorization is complete select the **“Summary and Submit”** button to submit for approval.

The screenshot shows a web-based travel authorization form for user Ian Trautman. At the top, there are fields for Business Purpose (Conference) and Description (Bank of America Conference). A red circle with the number '1' highlights the Date From (12/06/2017) and Date To (12/07/2017) fields. Below this is a section for Projected Expenses, with options to Expand All, Collapse All, Add, and Quick-Fill. A table lists expense details. A red circle with the number '2' highlights the *Originating Location and *Destination Location fields, both set to Michigan. Other fields in the table include *Date (12/06/2017), *Expense Type (Automobile Mileage), *Description (Kalamazoo to Detroit), *Payment Type (Personal Credit Card), *Billing Type (REIMBURS), *Miles (200), and *Number of Passengers (1). An Accounting Details section is partially visible at the bottom.

| *Date | *Expense Type | *Description | *Payment Type |
|------------|--------------------|----------------------|----------------------|
| 12/06/2017 | Automobile Mileage | Kalamazoo to Detroit | Personal Credit Card |