PeopleSoft Financials
Travel Authorization and Expense System

Workflow Approval

Payroll & Disbursements
Overview

• The workflow approval in many cases for non Academic Departments is the HR Supervisor of the traveler. 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 these email messages instead.

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

• 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: 402548
Employee Name: Trautman, Ian
Submission Date: 2017-06-29
Travel Auth Description: IMC 16
Travel Auth ID: 0000001618
Business Purpose: Conference
Reimbursement Amount: 4036.00 USD

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


The link shown in the email will take you to the Travel Authorization Summary page to approve the authorization.

An email notification will be sent to the approver when it is their turn in the workflow to approve. After clicking on the link, a new tab in your default internet browser will be opened to the “Travel Authorization Summary” page in PeopleSoft Financials.
Travel Authorization Notification

• Alternatively, the approver can log in to the PeopleSoft Financials system through GoWMU and select the flag icon (1) on the toolbar, which will display new pending actions. Select the “View All” button for a comprehensive list (2).
Accessing the Travel Authorization Worklist

• Note that the HR Supervisor, Department Reviewers and VP Managers (if required) will be notified by email of authorizations that require their approval.

• For international air travel on a grant fund 25 through 30, the TA will route to Grants and Contracts.

Click the link of the authorization you wish to review to open the “Travel Authorization Summary” page.
Reviewing the Travel Authorization

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

• The “Pending Actions” reflect the workflow routing and the individuals of whom approval is still needed.

Clicking on the expense type will open the detail screen for that expense. The “Action History” shows the chronological history of approvals.
Reviewing the Travel Authorization

• By selecting the expense type, the approver will be able to review the details of each individual expense and change the information if necessary.

• The “Accounting Detail” link will show the fund, cost center and account that the expense is associated with.
Approving the Travel Authorization

- There are four options of approval located at the bottom of the travel authorization:
  - "Approve" – Forwards the authorization on in the workflow
  - "Send Back" – Sends the authorization back to the traveler to make changes as necessary. The workflow will start over when the traveler resubmits
  - "Deny" – Immediately ends the authorization workflow, however, the authorization is still able to be viewed or printed
  - "Save Changes" – Any changes that the approver makes to the authorization is saved

The "Approve" button may also say "Reviewed". This is determined by whether the individual is considered a "Reviewer" in the workflow. If the individual is an HR Supervisor or Expense Manager this will read "Approve"
Approving the Travel Authorization

• The “Notes” and “Comments” fields can be used to write in any information that the approver wishes to communicate to the traveler or those upcoming in the workflow.

• Please note that these comments will not show on the printed authorization, they are only for reference. Information written in the “Notes” will be seen by all parties on the workflow whereas the “Comments” are only seen by the next approver in the workflow.
Approving the Travel Authorization

• As an approver, please be aware that once the travel date has passed the system will usually not allow you to approve the authorization any longer because the trip has already happened.

• If the travel date passes and you have not approved, “Send Back” the authorization to the traveler stating that the travel date has passed and send an email stating your approval to attach to the travel expense voucher when seeking reimbursement.

Please make sure that travelers are doing their best to submit authorizations as early as possible to prevent authorization approval errors. If you as an approver know that you will not be available to approve authorizations while on leave, please make arrangements to have another individual do so on your behalf.
Approving the Travel Authorization

- If the expense allocation is to a department not associated with the 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.

- Please note: If you deny one or more individual expenses this may cause a system error. If the authorization contains errors, please send the authorization back to the traveler to correct.