

Common Travel Authorization Errors & Best Practices

1) My Travel Authorization is still in the “Pending” status even though I submitted it?

- a When the Travel Authorization is in the “Pending” status after the traveler submits, that is an indicator that there is an error on one or more of the expense line items that needs to be corrected for the TA to submit properly. The best way to see where the errors are is to hit the “Save for Later” option at the top right of the screen and look for any fields that are highlighted in red or by clicking on the red flag icon to the left of the expense line item name. Some common errors that may be preventing submission are below:

The screenshot shows the 'Modify Travel Authorization' interface. At the top, there are fields for Business Purpose (Conference), Description (Test TA), Date From (07/11/2022), Date To (07/12/2022), Authorization ID (0000023551), and Reference. Below this is a 'Projected Expenses' section with a table. The table has columns for Date, Expense Type, Description, Payment Type, Amount, and Currency. One row is highlighted in red, indicating an error. Annotations with red arrows point to specific fields: a green box points to the 'Save for Later' button with the text 'Hitting "Save for Later" above will show any fields that have errors highlighted in red like this'; another green box points to the 'Location' field (Michigan) with the text 'Location field requires State for Hotel expense but sometimes requires the city instead'; a third green box points to the 'Preferred' and 'Unknown' radio buttons with the text 'Preferred and Unknown options selected'. The 'Merchant' field is set to 'UNKNOWN'.

b “Non-Preferred” vendor

- i When using the “Airfare” or “Hotel” expenses, the system will require that the traveler select a merchant that they intend to use. When using a vendor that is not one of the common options listed, make sure to choose “Preferred” and “UNKNOWN” as the options to select instead of “Non-Preferred”. For some reason, this option tends to have issues if not filled out exactly right that can cause errors when submitting.

c “Description” field left blank

- i The “Description” field on the TA for expenses can be filled in with whatever pertinent information the traveler desires, but is required to be filled in with something. If left blank, the system will see an error and prevent the TA from being submitted.

d Incorrect city/state entered in the “Location” field

- i For expense line items such as “Meals”, “Hotel” or “Automobile Mileage” that require the city/state of origin be entered, if the wrong option is

entered it can cause errors on the TA. A reference of which option is being requested can be found below:

- 1 **Airfare – City (ex. Kalamazoo)**
- 2 **Automobile Mileage/Rental – State (ex. Michigan)**
- 3 **Hotel – State (ex. Michigan)**
- 4 **Meals/Incidentals – City (ex. Kalamazoo)**

2) **My Travel Authorization is sitting for approval with an individual who is traveling/on leave and won't approve before the travel occurs?**

- a The system has an option available that allows approvers to temporarily reassign their approval role to a designated individual who can approve on their behalf, however, it is the responsibility of the approver to do so before they leave for travel/leave to do so. The process for reassigning approval roles is found below.
- b On the left side of the screen, select "Approve/Review" and then "Workflow Reassignment". Enter the Bronco NetID of the individual you want to give approval rights to and the date range desired and hit "Save" at the bottom.

The screenshot displays the 'Employee Self Service' interface for 'WMU Travel A'. The left sidebar contains a navigation menu with the following items: 'Travel Authorizations', 'Approve/Review', 'Approve Transactions', 'Workflow Reassignment' (highlighted with a red box), and 'Miscellaneous'. The main content area is titled 'General Profile Information' and shows the user 'Ian Trautman'. Under 'Personalizations', there are fields for 'My preferred language for PIA web pages is: English', 'My preferred language for reports and email is: English', 'Currency Code: USD', and 'Default Mobile Page'. A red box highlights the 'Alternate User' section, which includes the instruction: 'If you will be temporarily unavailable, you can select an alternate user to receive your routings.' Below this are three input fields: 'Alternate User ID' with a search icon, 'From Date' with a calendar icon and '(example:12/31/2000)', and 'To Date' with a calendar icon and '(example:12/31/2000)'.

3) **I am unable to access the TA system because my Empl ID doesn't show as an option on the Create/Modify screen?**

- a. The TA system is directly integrated with the PeopleSoft HR system where it looks to see whether the traveler is active in the system to determine whether they should have access to the travel system as well. When an employee is a temporary employee, a student or on extended leave which shows the employee as “inactive” in the system, the TA system will read that they are inactive and subsequently won’t allow the employee to access. In these cases, someone from the department can create a TA on their behalf and indicate in the “Description” of the TA that it is for someone else to keep the travel process running smoothly.

Travel Authorizations ^

Create/Modify

- View
- Delete
- Cancel

Approve/Review v

Miscellaneous v

Travel Authorization

Find an Existing Value | Add a New Value

Empl ID 🔍

Add

Find an Existing Value | Add a New Value