

Navigating the Travel & Expense Center

- 1) When you first log into the Employee Self Service module, you should see a blue home page. Select the “WMU Travel Authorizations” tile



- 2) On the navigation bar on the left side of the screen, you will see 3 sections: “Travel Authorizations”, “Approve/Review” and “Miscellaneous”.

- 3) **Travel Authorizations**

- a. **Create/Modify** – By default, the system will bring you to this option. To create a new TA select the correct Empl ID for the individual you want to create a TA for and select “Add” to begin. To edit an existing TA **that has not been submitted yet**, select the “Find an Existing Value” tab and hit “Search” to pull up your TA to edit.



- b. **View** – Hit the “Search” button to pull up all TA’s created for yourself or those who have delegated access to you. After pulling up the TA you can print a PDF of the TA or withdraw it if you want it sent back to you if it is in process and hasn’t been approved by any parties.

Travel Authorization

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Search by: Authorization ID begins with

Search [Advanced Search](#)

Search Results

View All 1-17 of 17

Authorization ID	Description	Name	Empl ID	Status	Creation Date
0000021262	Test	Trautman, Ian	402948	Pending	08/25/2021
0000018818	Alliance Conference 2020	Nugteren-Wallace, Ashley L	400081	In Process	11/14/2019

- c. **Delete** – You can choose to delete any TA’s that have **not been submitted** using this option.

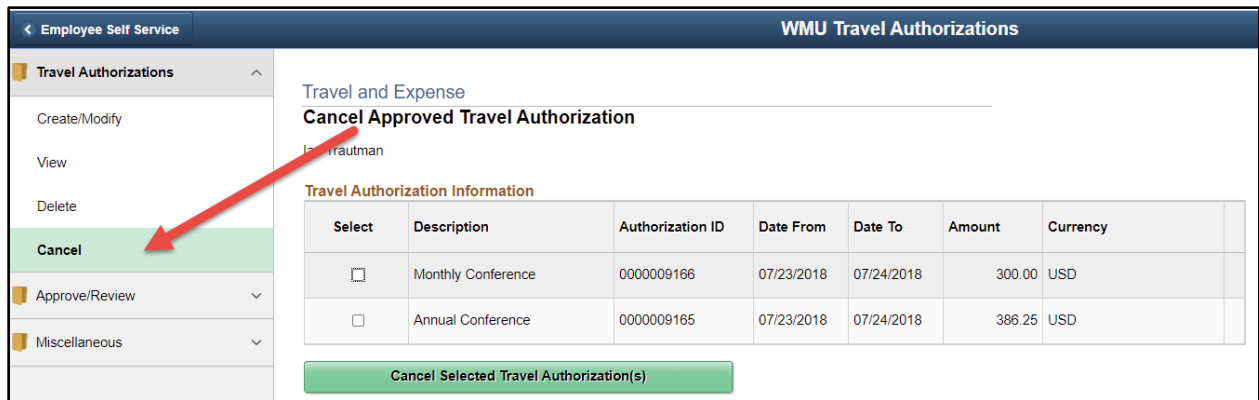
Delete a Travel Authorization

Travel Authorizations

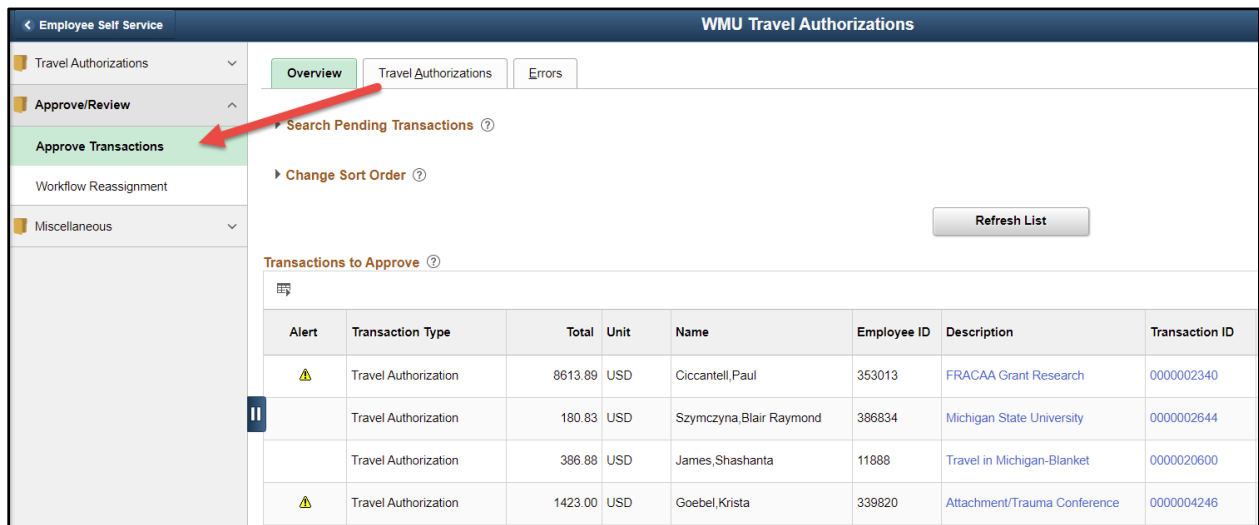
Select	Description	Authorization ID	Date From	Date To	Amount	Currency
<input type="checkbox"/>	Test	0000021262	08/25/2021	08/25/2021	84.00	USD
<input type="checkbox"/>	Blah	0000017809	09/23/2019	09/24/2019	500.00	USD
<input type="checkbox"/>	Kronos Conference	0000016155	07/02/2019	07/05/2019	1,714.00	USD
<input type="checkbox"/>	Conference	0000000523	04/24/2017	04/25/2017	250.00	USD
<input type="checkbox"/>	Conference	0000000522	04/17/2017	04/18/2017	250.00	USD
<input type="checkbox"/>	Alumni Event	0000000517	04/17/2017	04/18/2017	54.00	USD
<input type="checkbox"/>	Conference	0000000516	04/17/2017	04/18/2017	250.00	USD
<input type="checkbox"/>	Sample	0000000145	03/08/2017	03/09/2017	59.00	USD
<input type="checkbox"/>	Annual Leadership Conference	0000000080	03/07/2017	03/10/2017	1,621.50	USD

Delete Selected Authorization(s)

- d. **Cancel** – You can choose to cancel any TA’s that have **already been fully approved** using this option. (Note: This does not delete the TA, but moves the status of the TA from “Approved” to “Cancelled”)



- 4) **Approve/Review** (Note: This will only appear if you have been designated with the “Approver” or “Reviewer” status in the TA system. If you don’t see this but believe you should be in the workflow to approve TA’s, please email acnt-travelinquiry@wmich.edu)
- a. **Approve Transactions** – All TA’s that are in your queue to approve will show up on this screen. You can select the TA by hitting the “Transaction ID” number of the TA to pull it up.



- b. **Workflow Reassignment** – If you know you are going on leave and cannot approve TA’s or want to assign your approval rights to another individual permanently, you can select their name and the date range here.

Employee Self Service **WMU Travel Authorizations**

General Profile Information

Ian Trautman

Personalizations

My preferred language for PIA web pages is: English

My preferred language for reports and email is: English

Currency Code: USD

Default Mobile Page

Alternate User

If you will be temporarily unavailable, you can select an alternate user to receive your routings.

Alternate User ID:

From Date: (example: 12/31/2000)

To Date: (example: 12/31/2000)

5) Miscellaneous

- a. **Delegate Entry Authority** - can be used to give access to another individual to create, edit or view authorizations on your behalf.

Employee Self Service **WMU Travel Authorizations**

Authorize Users

Ian Trautman

Using new UserIDs on this page will give those users the ability to enter expense transactions on behalf of the employee.

Authorize Users

*Authorized User ID	Name	*Authorization Level		
<input type="text" value="amcnees"/>	McNees, Ann M	Edit & Submit	+	-
<input type="text" value="djb6596"/>	Trautman, Ian	Edit & Submit	+	-
<input type="text" value="l4bettis"/>	Bettis-Cooper, Lisa R	Edit & Submit	+	-

- b. **Create/Update User Template** – If you want to create a template for TA's that can be easily accessed when creating a new TA you can do so here.

User Template
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Search by: Document Template | begins with

Search | Advanced Search

Search Results

View All | 1-3 of 3

Document Template	Template Type	Description
CONFERCE	Trav Auth	Conference
CONFRNCE	Trav Auth	Conference
MEALS	Trav Auth	Default

- c. **Review/Edit Profile** – You can edit what shows up by default for several options associated with the Travel Authorization here such as the payment type or billing type of a specific expense when it’s added into the TA or the default business type among other things.

User Defaults
Ian Trautman

Default Creation Method

*Expense Report: Open a Blank Report

*Time Report: Open a Blank Report

*Travel Authorization: Open a Blank Authorization

Expense Defaults

Report Description: | Business Purpose: | Per Diem Range: -365 Days

Originating Location: | Billing Type: | Payment Type: | Credit Card: | Number of Nights: |

Expense Location: | Transportation ID: | Accounting Detail Default View: Collapsed

Expense Type Defaults

Expense Type	Payment Type	Billing Type		
Airfare_Domestic	Prepaid Expenditures	NON-REIMBURSABLE	+	-
Automobile Rental	Personal Credit Card	REIMBURSABLE	+	-

- d. **Query Viewer** – If needed you can run specific travel related queries by hitting the “Search” button.

Employee Self Service WMU Travel Authorizations

Travel Authorizations
Approve/Review
Miscellaneous
Delegate Entry Authority
Create/Update User Template
Review/Edit Profile
Query Viewer

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

Query

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel
WMU_EX_TAUTH_IAN	Test	Private		HTML	Excel
WMU_EX_TAUTH_AP_AIRFARE	AP Airfare Traveler Report	Public		HTML	Excel