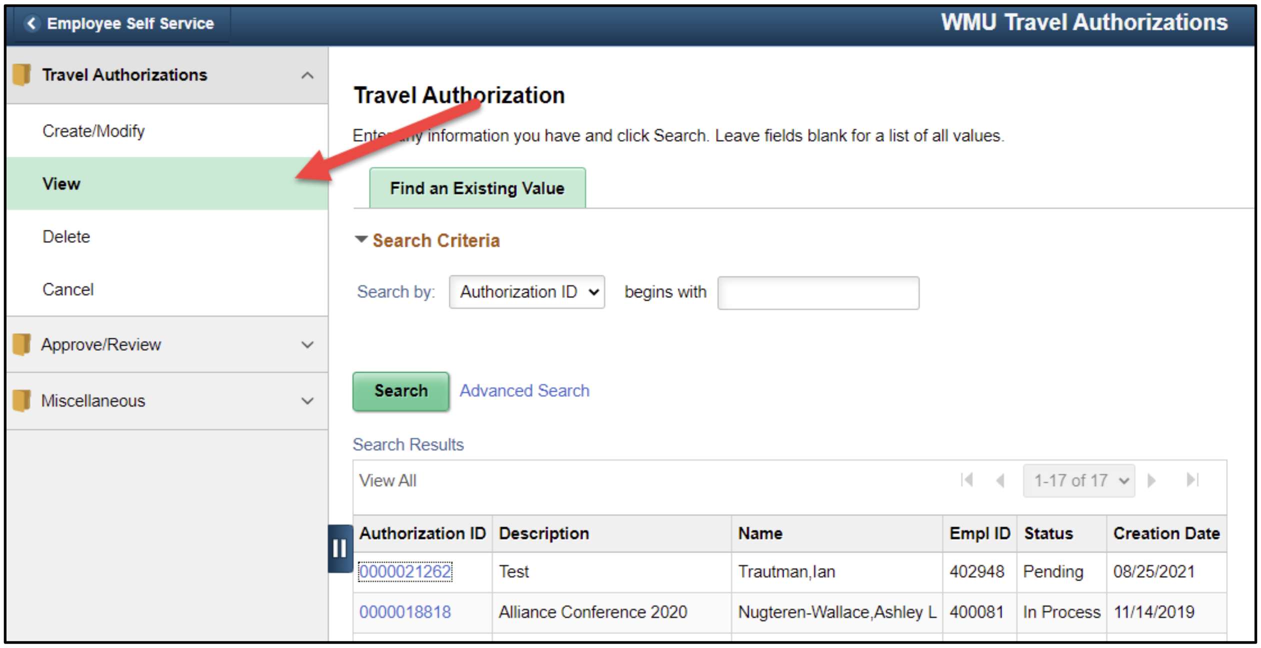
Navigating the Travel & Expense Center

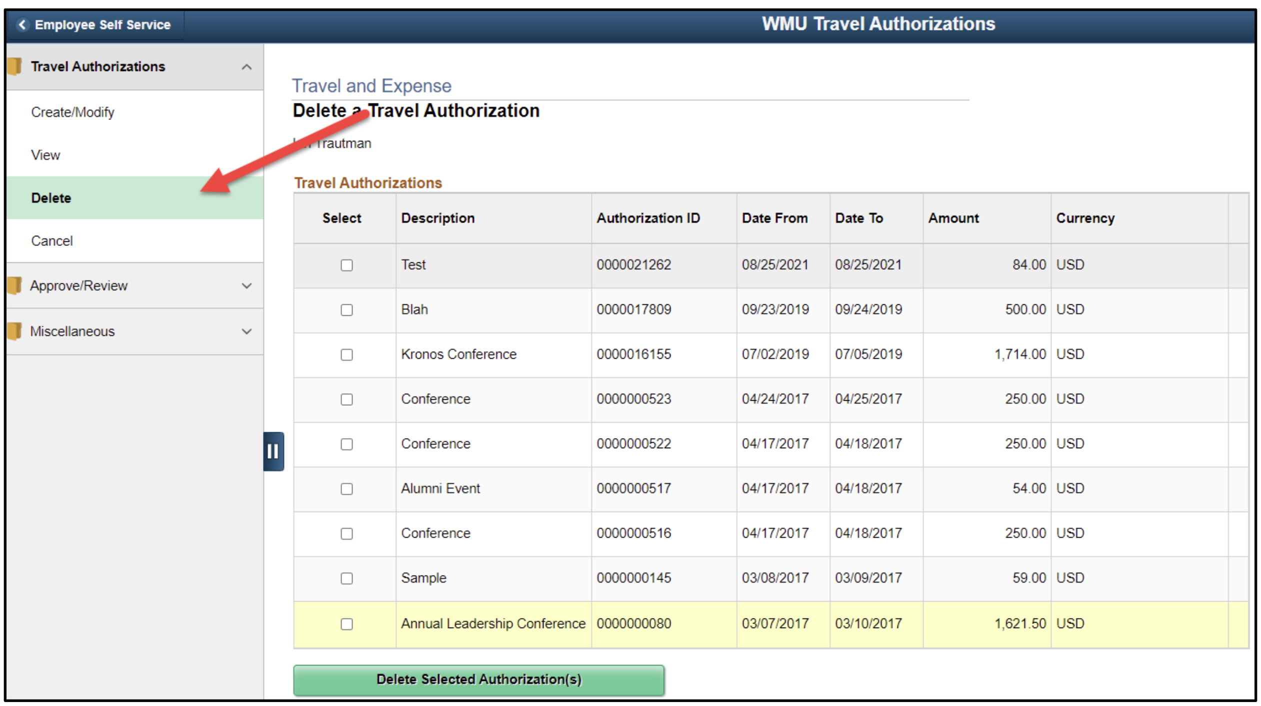
1) When you first log into the Employee Self Service module, you should see a blue home page. Select the "WMU Travel Authorizations" tile

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.

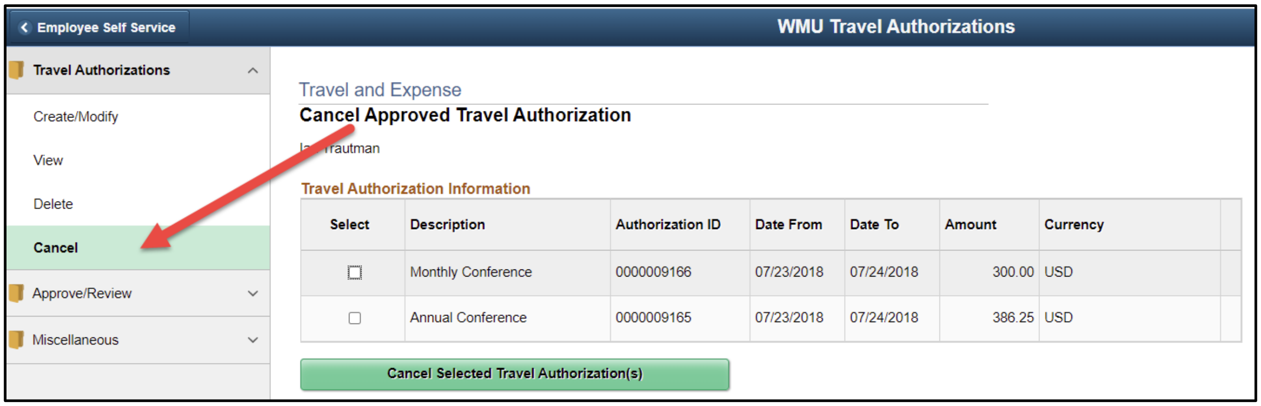
   b. **View** – Hit the "**Search**" button to pull up all TA's created for yourself or those who have delegated access to you. After pulling up the TA you can print a PDF of the TA or withdraw it if you want it sent back to you if it is in process and hasn't been approved by any parties.



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

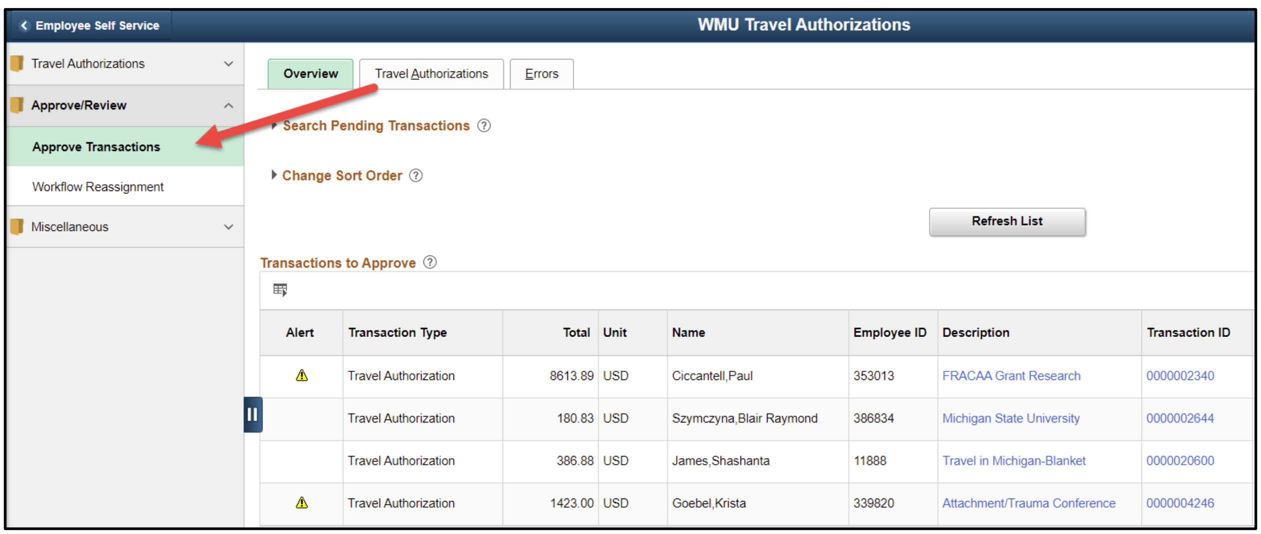


d. **Cancel** – You can choose to cancel any TA's that have **already been fully approved** using this option. (Note: This does not delete the TA, but moves the status of the TA from "Approved" to "Cancelled")

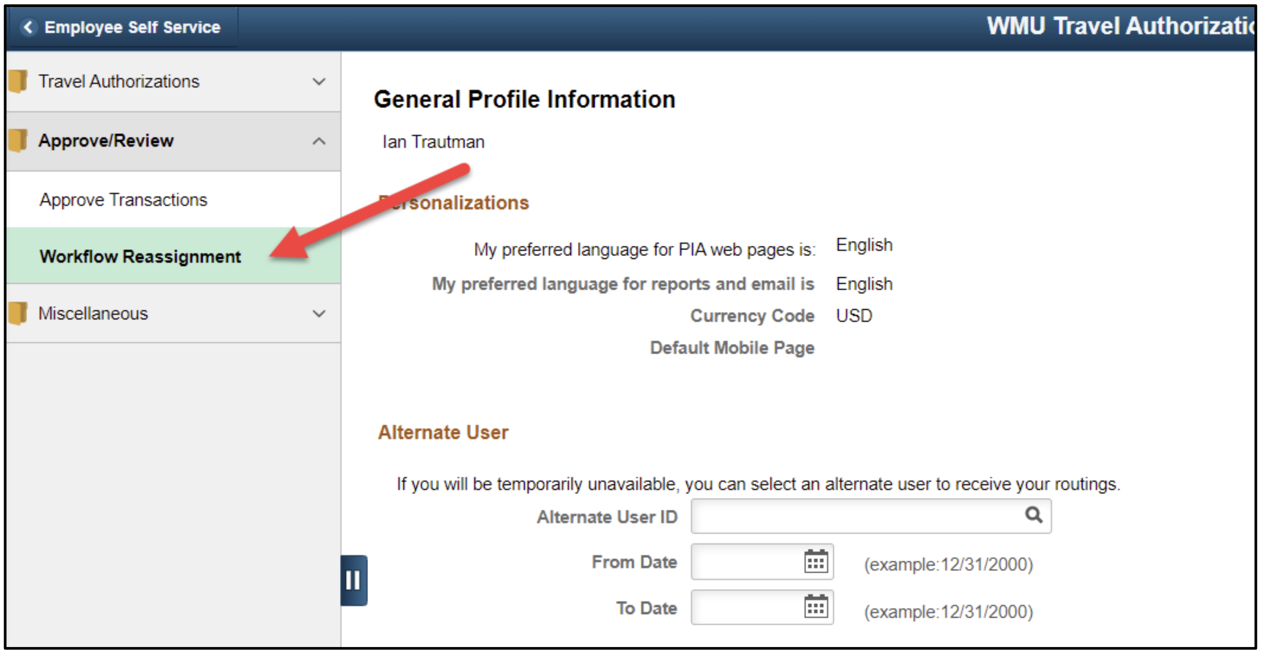


4) **Approve/Review** (Note: This will only appear if you have been designated with the "Approver" or "Reviewer" status in the TA system. If you don't see this but believe you should be in the workflow to approve TA's, please email acnt-travelinquiry@wmich.edu)

   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.

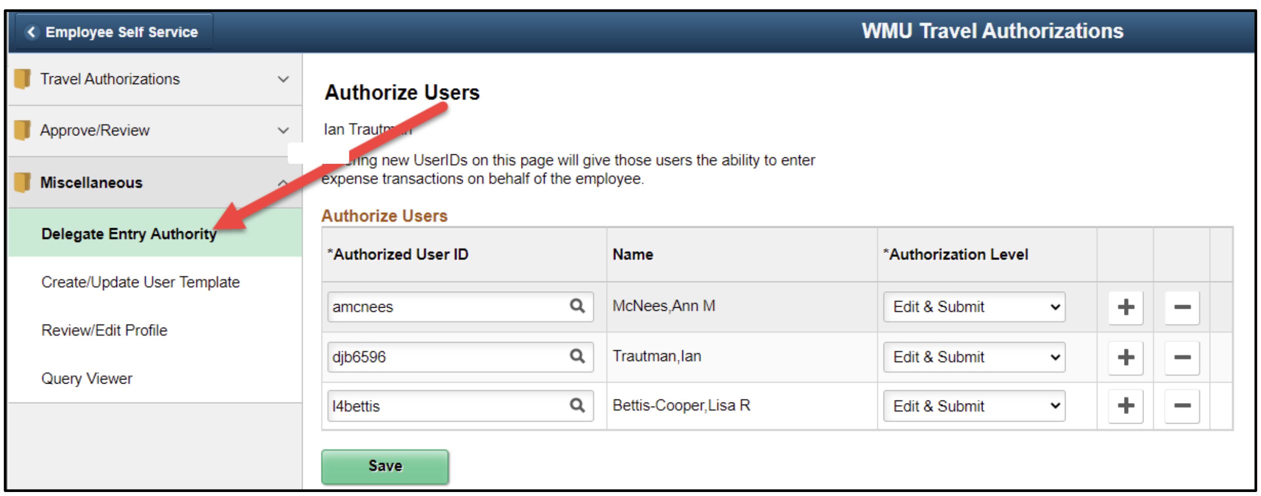


   b. **Workflow Reassignment** – If you know you are going on leave and cannot approve TA's or want to assign your approval rights to another individual permanently, you can select their name and the date range here.

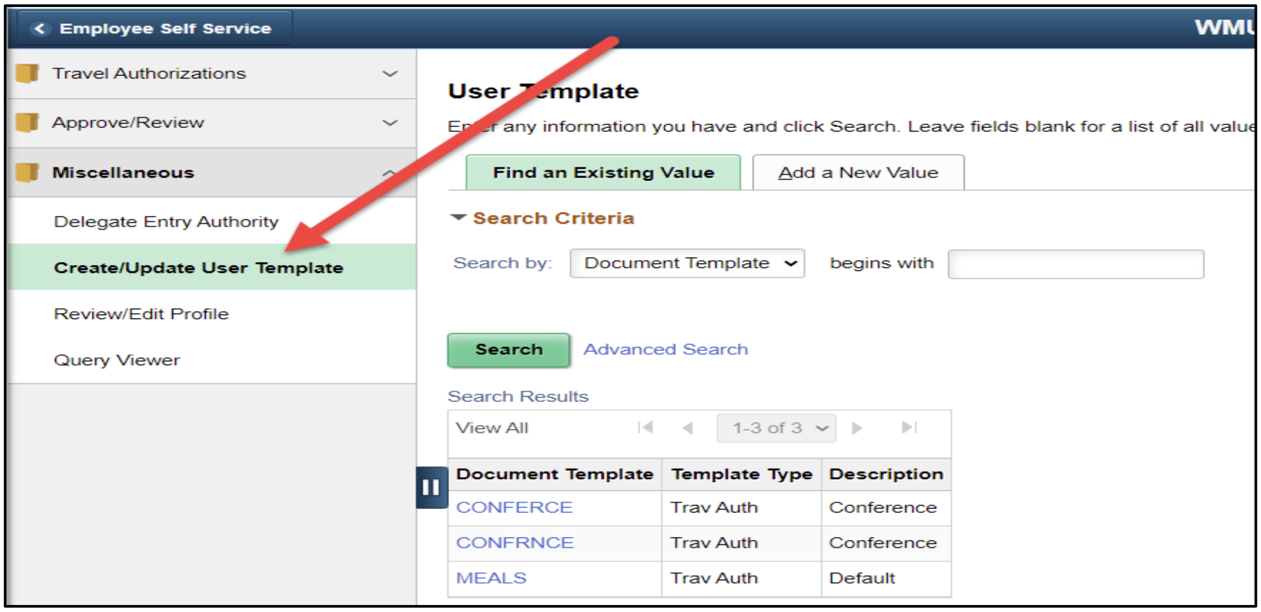


5) **Miscellaneous**

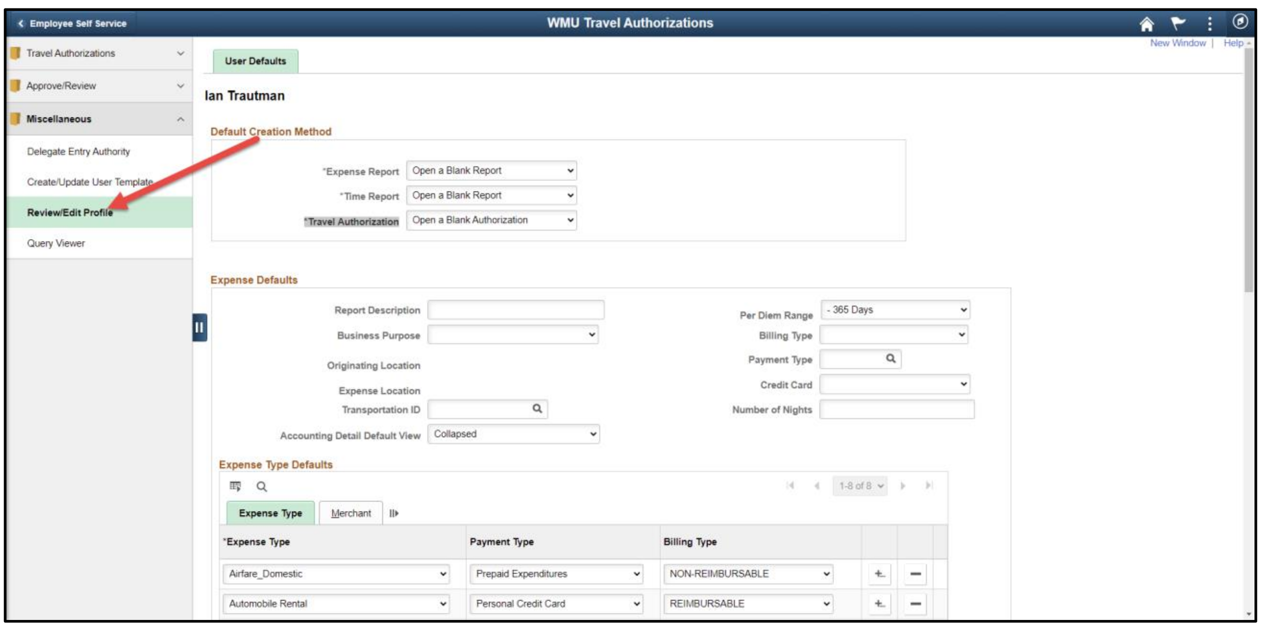
a. **Delegate Entry Authority** - can be used to give access to another individual to create, edit or view authorizations on your behalf.



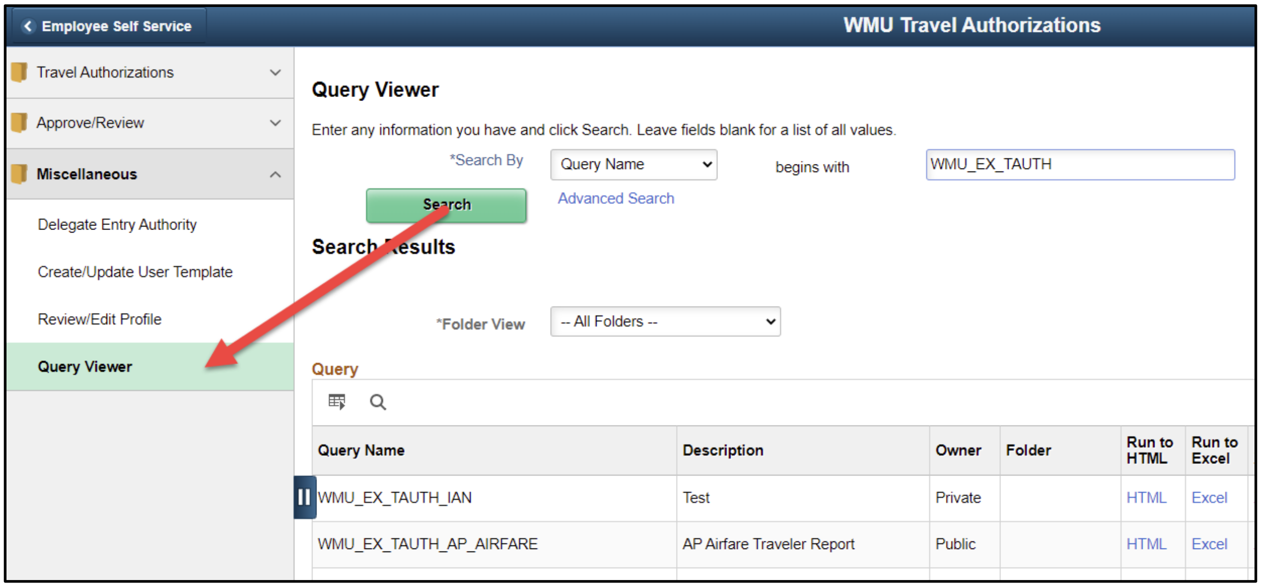
b. **Create/Update User Template** – If you want to create a template for TA's that can be easily accessed when creating a new TA you can do so here.



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.



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
Query Name
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WMU_EX_TAUTH
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Advanced Search
Search Results
*Folder View
-- All Folders --
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Test
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AP Airfare Traveler Report
Public
HTML
Excel