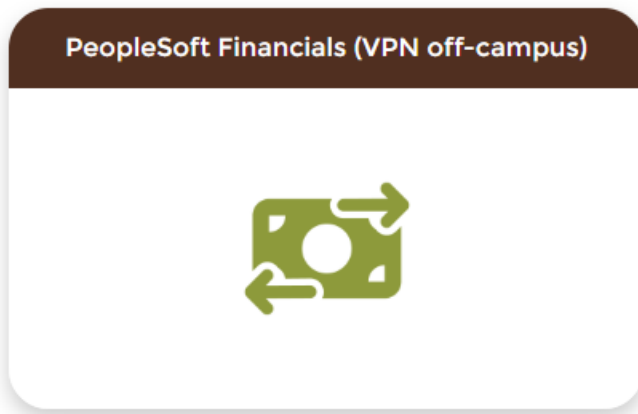


WMU Travel Authorization User Manual

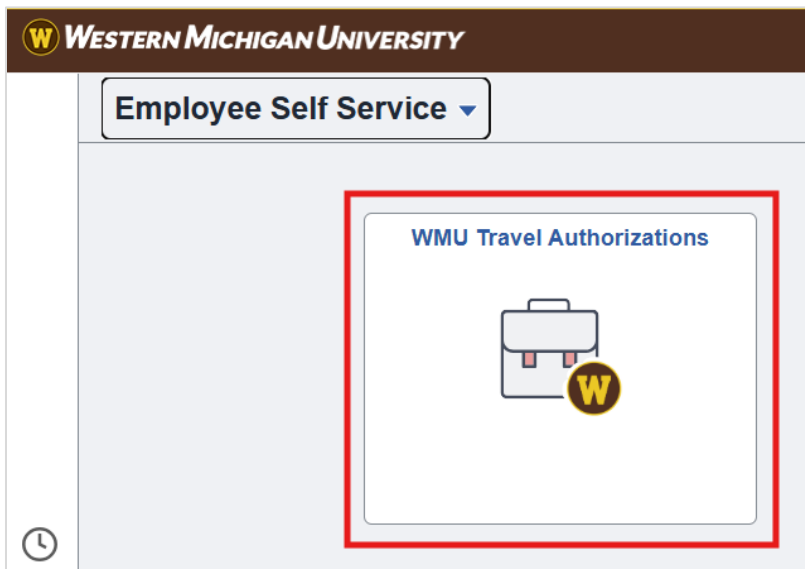
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Accessing the Travel Authorization System

1. Login to GoWMU, go to “**Apps**” and under “**For Faculty and Staff**” select “**PeopleSoft Financials**”



2. On the log in screen, enter your Bronco Net ID and password and select “**Sign In**”.
3. On the home screen that follows, select the “**WMU Travel Authorizations**” tile that has the briefcase pictured. This will take you to the Travel Authorization system.



Navigating the Travel and Expense Center

1. On the navigation bar on the left side of the screen you will see 3 sections
 - a. Travel Authorizations
 - b. Approve/Review
 - c. Miscellaneous
2. Travel Authorizations
 - a. **Create/Modify**- Create or edit a Travel Authorization

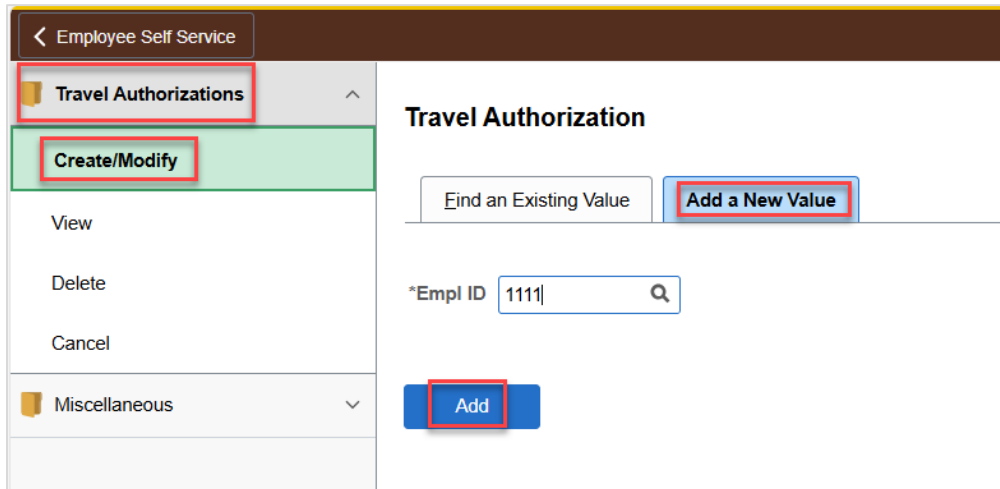
- b. **View**- this section is used to view, print, and see where a Travel Authorization is in the approval workflow
 - c. **Delete**- Delete a Travel Authorization that has been submitted
 - d. **Cancel**- Cancel an existing Travel Authorization that has already been approved
- 3. **Approve/Review**- This section will only appear if you have been designated with “Approver” or “Review” status.
 - a. **Approve Transactions**- All Travel Authorizations in your queue to approve will show up on this screen.
 - b. **Workflow Reassignment**- Reassign Travel Authorization approval to another individual if you know you will be away
- 4. **Miscellaneous**
 - a. **Delegate Entry Authority**- Give access to another individual to create, edit, or view on your behalf
 - b. **Create/Update User Template**- Create a template for Travel Authorizations that can easily be accessed when creating a new Travel Authorization
 - c. **Review/Edit Profile**- Edit what populates by default for several options associated with the Travel Authorization such as payment, billing, and business type
 - d. **Query Viewer**- Run specific travel related queries

Creating a Travel Authorizations

Under “**Travel Authorizations**” select “**Create/Modify**” and click on the “**Add a New Value**” tab. Enter the Employee ID of the individual you are creating an authorization for. Your Employee ID should show by default.

If the Employee ID is not known, select the  icon to search for all users you have the authority to create an authorization for.

Click the **Add** button



The screenshot shows the Employee Self Service interface. On the left, the 'Travel Authorizations' menu is expanded, and the 'Create/Modify' option is selected. The main area displays the 'Travel Authorization' form. The 'Find an Existing Value' tab is selected, and the 'Add a New Value' button is highlighted. The 'Add' button is also highlighted. The form includes a search bar for 'Empl ID' with the value '1111' entered.

1. Business Purpose – Select the purpose of travel from the drop down
2. Description – Enter a brief description of the travel which may include the final destination location. This will be the ‘title’ of your authorization
3. Date From/Date To – Enter or select the travel dates of the travel
4. Quick Start – The default option is “**A Blank Authorization**”, however if you want to create an authorization based off “**A Template**” or “**An Existing Authorization**” you can select those options using the “**Populate From**” drop-down box and select “**GO**”

****NOTE:** you may have to scroll to the right to see the “**Go**” button

5. Populate From – Populate information from a template or existing travel authorization
6. Notes – Enter any additional information you want noted about your travel

The screenshot shows the 'Create Travel Authorization' form. It includes fields for Business Purpose (1), Description (2), Date From (3), Date To (3), Quick Start (4), and a dropdown for Populate From (5) with a GO button. There is also a Notes field (6). At the top right, there are links for 'Save for Later' and 'Summary and Submit'.

Projected Expenses- To add multiple expense lines select the + Icon to the right of the expense or select “**Quick-Fill**” (see pg.6 for details)

The screenshot shows the 'Projected Expenses' table. It has columns for Line#, Date, Expense Type, Payment Type, Amount, and Currency. A 'Quick-Fill' button is highlighted in the 'Add' section. The table currently shows 0 lines.

1. Date – Date expense occurs
2. Expense type – Choose from Airfare, Automobile, Lodging, Meals, or Miscellaneous
3. Payment Type – How the expense is being paid
4. Amount- Total amount of expense
5. Billing Type- Reimbursable or Non-reimbursable
6. Accounting Details- The fund, cost center, and account associated with the expense

The screenshot shows the 'Projected Expenses' table with one line item added. The line item has a date, expense type of 'Airfare_Domestic', payment type, amount of 0.00, and currency of USD. The 'Billing Type' is set to 'REIMBURSE'. The 'Accounting Details' section is also visible.

****Additional information needed per expense type**

- Airfare Expenses-International

- Travel To- Final destination city of travel

Projected Expenses ?
Expand All | Collapse All Add: | ⚡ Quick-Fill

Line# *Date *Expense Type

▼ 2 Airfare_International ▼

*Billing Type REIMBURSE ▼

*Travel To 🔍

▶ Accounting Details ?

- Hotel Expenses

- Number of Nights- Number of nights spent at the location
- Nightly Rate

Projected Expenses ?
Expand All | Collapse All Add: | ⚡ Quick-Fill

Line# *Date *Expense Type

▼ 2 Hotel/Lodging ▼

*Billing Type REIMBURSE ▼

Number of Nights 1

*Nightly Rate 0.00

▶ Accounting Details ?

- Meals/incidental Expenses

- Location- Where you will be traveling to
- Per Diem Range: 0-365 days

Projected Expenses ?
Expand All | Collapse All Add: | ⚡ Quick-Fill

Line# *Date *Expense Type

▼ 2 10/03/2025 Meals/Incidental Expenses ▼

*Billing Type REIMBURSE ▼

*Location Standard US Per Diem 🔍

*Per Diem Range 0 - 365 Days ▼ ↻

▶ Accounting Details ?

- Miscellaneous Expenses
 - Description- Description of the expense

Projected Expenses ?
 Expand All | Collapse All Add: | ⚡ Quick-Fill

Line#	*Date	*Expense Type	Description
2	10/03/2025	Miscellaneous	

*Billing Type: REIMBURSE

▶ Accounting Details ?

Quick-Fill

Use “Quick-Fill” to quickly add multiple expense lines for one or all days of a specified date range.

1. On the “**Quick-Fill**” screen fill in the date range of your planned travel.
2. Add expense lines by selecting “**One Day**” or “**All Days**” next to each expense type you wish to add
3. You will then be brought back to the “**Create Travel Authorization**” page. Complete all of the necessary fields required for each of the expense

Quick-Fill

Enter the date range you want applied to the authorizations you will be adding to the report. Then choose the expense types and whether you want to add one instance of the expense type or have an entry of that expense type for each day within the date range.

Date Range

From 10/01/2025 To 10/03/2025

Add Expense Types:

One Day	All Days	Expense Type
☒	☐	Airfare_Domestic
☐	☐	Airfare_International
☐	☐	Automobile Rental
☐	☒	Hotel/Lodging
☐	☒	Meals/Incidental Expenses
☐	☐	Miscellaneous

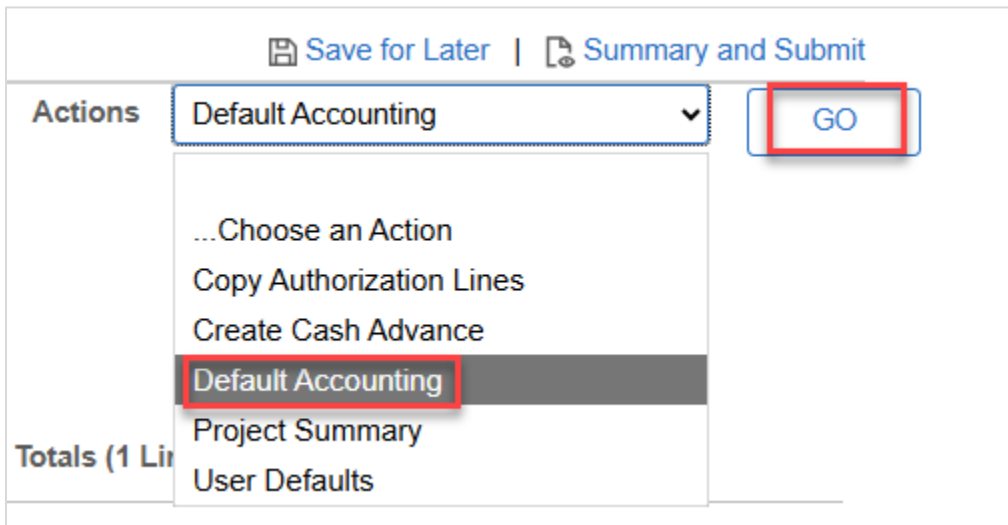
OK Cancel

Splitting or Changing Travel Authorizations Fund and Cost Center

Travel can be split between multiple fund and cost centers. You have the ability to split **ALL** expenses between multiple fund and cost centers or split **ONE** expense line to be charged to multiple fund and cost centers.

To split **all** expenses between multiple fund and cost centers:

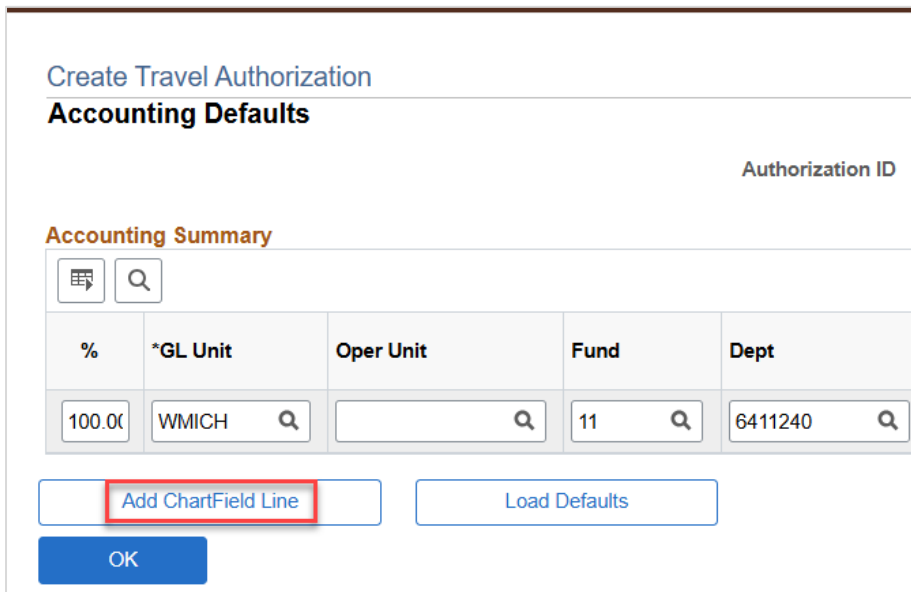
1. On the “**Create Travel Authorization**” screen select “**Default Accounting**” from the “**Actions**” field on the upper right side of the screen and click “**Go**”



The screenshot shows the top right corner of the 'Create Travel Authorization' screen. At the top, there are two links: 'Save for Later' and 'Summary and Submit'. Below these is the 'Actions' field, which is a dropdown menu currently showing 'Default Accounting'. To the right of the dropdown is a 'GO' button. The dropdown menu is open, showing a list of options: '...Choose an Action', 'Copy Authorization Lines', 'Create Cash Advance', 'Default Accounting' (which is highlighted with a red box), 'Project Summary', and 'User Defaults'. The 'GO' button is also highlighted with a red box.

****NOTE:** you may have to scroll to the right to see the “Go” button

2. On the “**Accounting Defaults**” screen, select “**Add ChartField Line**” to create an additional row



The screenshot shows the 'Accounting Defaults' screen. At the top, there is a link 'Create Travel Authorization' and the title 'Accounting Defaults'. Below the title is an 'Authorization ID' field. Underneath is the 'Accounting Summary' section, which includes a table with columns: '%', '*GL Unit', 'Oper Unit', 'Fund', and 'Dept'. The table has one row with the following values: '100.00', 'WMICH', an empty field, '11', and '6411240'. Below the table are two buttons: 'Add ChartField Line' (highlighted with a red box) and 'Load Defaults'. At the bottom left is an 'OK' button.

3. In the “%” column, adjust the percentages to add up to 100% and then change the Fund and Dept. numbers using the to search for them if you need and click “OK”

Accounting Summary

%	*GL Unit	Oper Unit	Fund	Dept	Pr
50.00	WMICH		11	6411240	
50.00	WMICH		56	0000000	

[Add ChartField Line](#)
[Load Defaults](#)

OK

[User Defaults](#)

**** NOTE:** If you need to **delete** a line, navigate to the “**Accounting Defaults**” screen, scroll all the way to the right and click the – icon to remove a row

To split **one** expense line to multiple fund and cost centers:

1. If you only need to split one expense between two fund and cost centers **do not** select “**Default Accounting.**” Instead expand the “**Accounting Details**” scroll all the way to the left and select the + Icon to add a row. You can then adjust the percentages to create a split.

Projected Expenses ⓘ

[Expand All](#) | [Collapse All](#) Add: | [Quick-Fill](#)

Totals (1 Line) 300.00 USD

Line#	*Date	*Expense Type	*Payment Type	*Amount	Currency	
1		Airfare_Domestic		300.00	USD	+ -

*Billing Type REIMBURS

Accounting Details ⓘ

[Chartfields](#) ⓘ

Amount	ject	Activity	Source Type	Category	Subcategory	Affiliate	Fund Affil	
300.00								+ -

Saving and Submitting the Travel Authorization

1. On the upper right side of the screen, you will see “**Save for Later.**” Click this button to save your progress and the system will assign an Authorization ID

number which will need be referenced when booking the travel

The screenshot shows a web interface for travel authorization. At the top right, there are two links: 'Save for Later' (with a floppy disk icon) and 'Summary and Submit' (with a document icon). Below these, there is a 'Print' button, an 'Actions' label, a dropdown menu showing '...Choose an Action', and a 'GO' button. In the center, there is a yellow highlighted box containing the text 'Authorization ID 0000035292 Pending'.

2. When the authorization is ready to be submitted, click **“Summary and Submit.”** On the next page select the checkbox to certify that all the costs are reasonable and select **“Submit Travel Authorization”**

The screenshot shows a web interface for travel authorization. At the top, there are two links: 'Save for Later' (with a floppy disk icon) and 'Summary and Submit' (with a document icon). Below these, there is a dropdown menu showing '...Choose an Action' and a 'GO' button. At the bottom, there is a checkbox with a checkmark and the text 'By checking this box, I certify these costs are reasonable estimates and comply with expense policy.' Below this, there is a blue button labeled 'Submit Travel Authorization'.

Blanket Travel Authorizations

Creating a blanket travel authorization for a large period of time from an existing authorization makes it easier for the traveler or their delegate by having preselected expense lines.

****NOTE:** When creating a blanket authorization, you cannot backdate to a previous date. Make sure that you make the **“Date From”** a week in advance of the submit date, **not** the date of submission, to give approvers enough time to approve the authorization.

Copying an existing Travel Authorization

Creating a travel authorization from an existing authorization makes it easier for the traveler or their delegate by having preselected expense lines. This can be a quick tool to utilize for travelers who take common trips throughout the year.

1. Start by creating the travel authorization as normal. On the **“Create Travel Authorization”** screen at the top right of the screen is a drop-down box named “Quick Start.” In this box, select **“An existing Authorization”** and select **“Go”**

****NOTE:** you may have to scroll to the right to see the **“Go”** button

Create Travel Authorization

Marilyn Pelak ?

*Business Purpose

*Date From Attachments

*Date To Notes

Print

Quick Start

Save for Later | Summary and Submit

An Existing Authorization

GO

...Populate From

A Template

An Existing Authorization

Projected Expenses ?

Expand All | Collapse All

Add | Quick-Fill

Totals (0 Lines) 0.00 USD

- On the **"Copy from Existing Travel Authorization"** screen, the default setting is three months prior to the current date or you can input a date range and search for authorizations to copy form. Once you find the authorization you wish to copy click the **"Select"** button next to it.

Copy From an Existing Travel Authorization

From Date 07/07/2025 To 11/07/2025 Search

Travel Authorization Information

Description	Authorization ID	Date From	Date To	Amount	Currency
Select TEST	0000035292	10/27/2025	10/31/2025	268.00	USD

Return

- Back on the **"Create Travel Authorization"** update all pertinent information to be correct for your upcoming travel and save/submit when completed.

Nonemployee Travel Authorizations

Nonemployee Travel Authorizations are for invited guests to the university or part time faculty/students who do not have access to PeopleSoft. Authorization will be created by faculty/staff in their own name on behalf of the nonemployee traveler.

- Start by creating a travel authorization as normal. Once you get to the **"Create Travel Authorization"** screen, select **"A Template"** from the **"Quick Start"** option on the upper right side of your screen and select **"Go"**

****NOTE:** you may have to scroll to the right to see the **"Go"** button

Create Travel Authorization

Marilyn Pelak ?

*Business Purpose

*Date From 10/03/2025 Attachments

*Date To 10/03/2025 Notes

Print

Quick Start

Save for Later | Summary and Submit

A Template

GO

...Populate From

A Template

An Existing Authorization

Projected Expenses ?

Expand All | Collapse All

Add | Quick-Fill

Totals (0 Lines) 0.00 USD

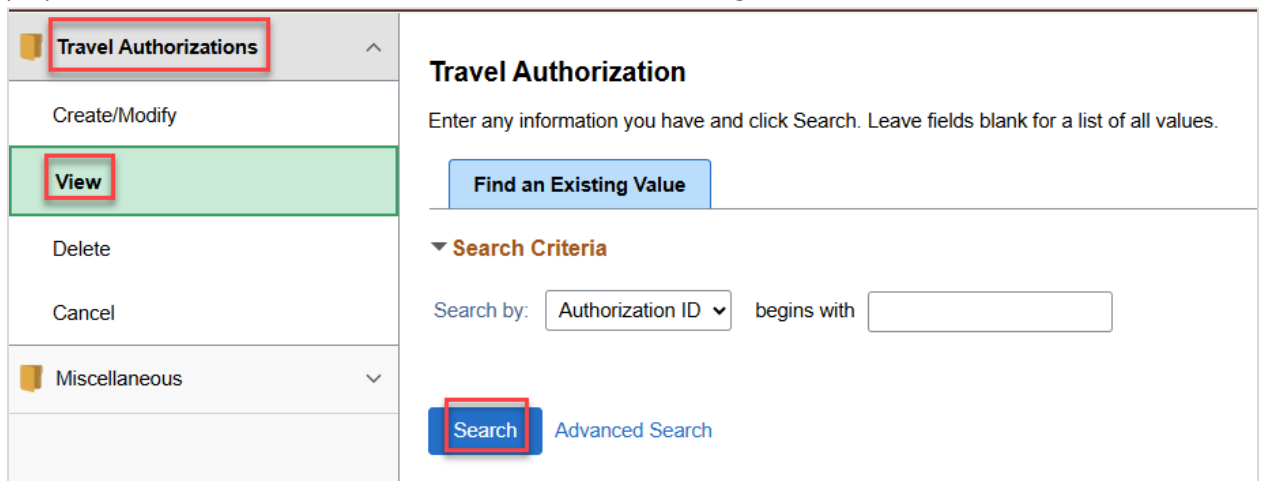
- On the **"Select a Template"** screen select **"NONEMP"**

3. On the next screen, enter the date range the travel is taking place. You then have the option to add nonemployee airfare and expenses for **“One Day”** or **“All Days.”** Select the appropriate boxes and click **“Ok”**
4. Back on the **“Create Travel Authorization”** screen
 - a. Notes- Please leave the name of the guest in the notes section
 - b. Business Purpose- “Non-Employee Expense”
 - c. Description- Include the name of the nonemployee traveler and the purpose of the travel
 - d. Billing Type- must be “non-Reimbursable” to the traveler. The department is going to reimburse the nonemployee for any expense if applicable
 - e. Submit when completed

Viewing a Travel Authorization

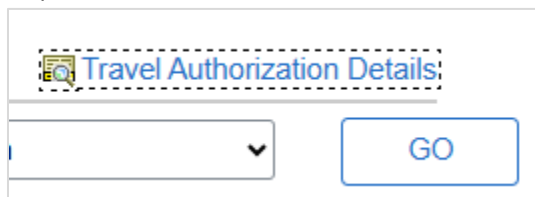
The **“View”** Option is what you will use when you want to see where the authorization currently sits in the workflow or to print an authorization

1. Go to **“WMU Travel Authorizations”**
2. Under **“Travel Authorizations”** select **“View”** followed by **“Search”** to populate a list all of the authorizations that are eligible to be Viewed



The screenshot shows the 'WMU Travel Authorizations' interface. On the left, a sidebar menu has 'Travel Authorizations' selected, and the 'View' option is highlighted in green. The main content area is titled 'Travel Authorization' and includes a search form. The search form has a 'Find an Existing Value' button, a 'Search Criteria' section with a dropdown menu set to 'Authorization ID' and a 'begins with' text input field, and a 'Search' button highlighted with a red box.

3. You can select the **“Travel Authorization Details”** on the top right to view the expense details.



The screenshot shows the 'Travel Authorization Details' section. It features a dashed box around the 'Travel Authorization Details' link, a dropdown menu, and a 'GO' button.

4. On the **“Summary”** screen you will be able to
 - a. Print
 - b. See the current authorization workflow

- c. View the “Action History” including who the authorization is currently sitting with
- d. View that Authorization ID number

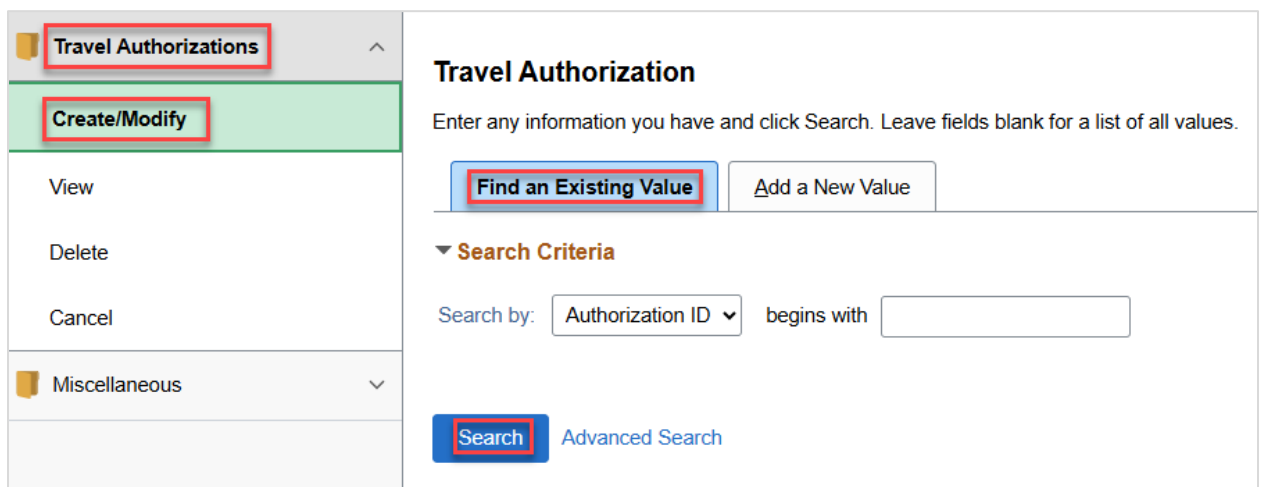
Modifying a Travel Authorization

There are two points at which you can modify an authorization

1. Before the authorization has been submitted for approval. If the authorization has been saved but not submitted you can modify it.
2. After the authorization has been submitted, and then subsequently “sent back” by an approver. If the authorization is sent back the approver is required to add a comment to provide further instructions on how to change the authorization

Travel authorizations that are in the approval workflow process cannot be modified by the employee, but if they have not yet been approved you can withdraw it.

1. Go to “**WMU Travel Authorizations**”
2. Under “**Travel Authorizations**” select “**Create/Modify**” and click on the “**Find an Existing Value**” tab and then hit “**Search**”



The screenshot displays the 'Travel Authorizations' interface. On the left sidebar, the 'Travel Authorizations' menu is expanded, and the 'Create/Modify' option is highlighted. Below it are 'View', 'Delete', and 'Cancel' options. At the bottom of the sidebar is a 'Miscellaneous' section. The main content area is titled 'Travel Authorization' and includes a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two tabs: 'Find an Existing Value' (which is selected and highlighted with a red box) and 'Add a New Value'. Under the 'Search Criteria' section, there is a 'Search by:' dropdown menu set to 'Authorization ID', followed by a 'begins with' text input field. At the bottom, there is a blue 'Search' button (highlighted with a red box) and a link for 'Advanced Search'.

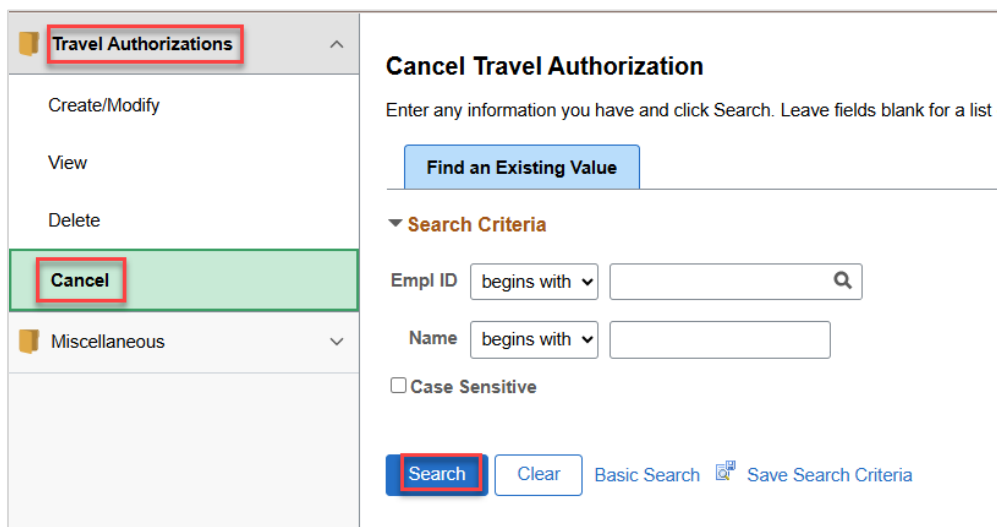
3. All of the authorizations that are eligible to be modified will be listed. If you are the delegate of another traveler, their authorization will be available to modify as well. Select the “**Authorization ID**” of the TA you wish to modify.
4. If you modify a travel authorization that has been sent back by an approver, you will see a red “**Sent back For Revision**” at the top of the authorization along with the approver’s comment.
5. If the travel authorization has never been submitted you can modify the authorization freely.
6. Submit once the appropriate corrections have been made

Canceling a Travel Authorization

A Travel Authorization can only be cancelled if it has already been fully approved and provided it is not associated with an expense report.

****NOTE:** the cancel action is permanent and **cannot be undone** if done in error

1. Go to “**WMU Travel Authorizations**”
2. Under “**Travel Authorizations**” select “**Cancel**” followed by “**Search**” to populate a list all of the authorizations that are eligible to be canceled



The screenshot displays the 'WMU Travel Authorizations' interface. On the left sidebar, the 'Travel Authorizations' section is expanded, and the 'Cancel' option is highlighted with a green background and a red border. Below it, the 'Miscellaneous' section is also visible. The main content area is titled 'Cancel Travel Authorization' and includes a search form. The form has a 'Find an Existing Value' button at the top. Below this, there are search criteria fields: 'Empl ID' with a dropdown set to 'begins with' and a search icon, and 'Name' with a dropdown set to 'begins with' and a search icon. There is also a checkbox for 'Case Sensitive'. At the bottom of the form, there are buttons for 'Search' (highlighted with a red border), 'Clear', 'Basic Search', and 'Save Search Criteria'.

3. Select the Travel Authorization you wish to cancel and click “**Cancel Selected Travel Authorization**”
4. After an authorization has been cancelled, it will appear with the “Closed” status

Deleting a Travel Authorization

A Travel Authorization can only be deleted if it has already been fully approved and provided it is not associated with an expense report.

****NOTE:** the delete action is permanent and **cannot be undone** if done in error

1. Go to “**WMU Travel Authorizations**”

- Under **“Travel Authorizations”** select **“Delete”** followed by **“Search”** to populate a list all of the authorizations that are eligible to be canceled

- Select the travel authorization you wish to delete and click **“Delete Selected Authorization”**

Select	Description	Authorization ID	Date From	Date To	Amount	Currency
☒	TEST	0000035292	10/27/2025	10/31/2025	268.00	USD

- After the authorization has been deleted, it will no longer appear in any search or be available to print

Setting up a Delegate

An entry delegate is someone who the traveler authorizes to create, modify, and view travel authorizations on their behalf.

- Navigate to the WMU Travel Authorizations page.
- On the left side of the screen select **“Miscellaneous”** and **“Delegate Entry Authority”**

Travel Authorizations ▾

Approve/Review ▾

Miscellaneous ▴

Delegate Entry Authority

Create/Update User Template

Review/Edit Profile

Query Viewer

- To add a delegate, select the “+” icon

*Authorized User ID	Name	*Authorization Level		
mwd5723	Pelak, Madilyn K	Edit & Submit	+	-

- **NOTE:** Do not delete the row containing your information by clicking the “-” next to your name
- On the new row click the magnifying glass to search for a user and select them from the list

*Authorized User ID	Name	*Authorization Level		
mwd5723	Pelak, Madilyn K	Edit & Submit	+	-
		Edit & Submit	+	-

- After you select your delegate, you can select if you would like the delegate to have “**View**”, “**Edit and Submit**”, or “**Edit**” access

Authorize Users

Madilyn Pelak

Entering 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		
mwd5723 Q	Pelak,Madilyn K	Edit & Submit ▼	+	-
WMU_TAUTH_LBC Q	Bettis-Cooper,Lisa	Edit & Submit ▼ Edit Edit & Submit View	+	-

7. When you are finished select **“Save”**

8. **“Expense Reports”** click **“Create/Modify”**