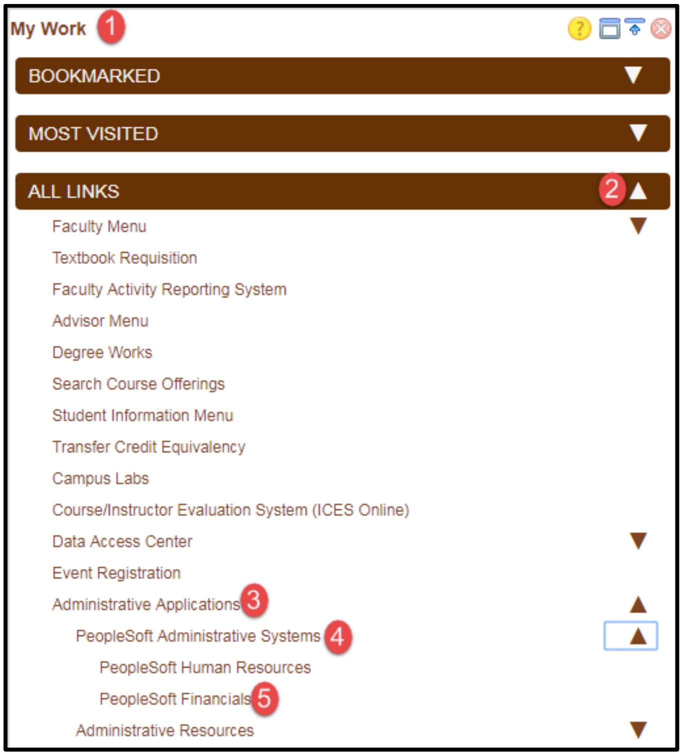
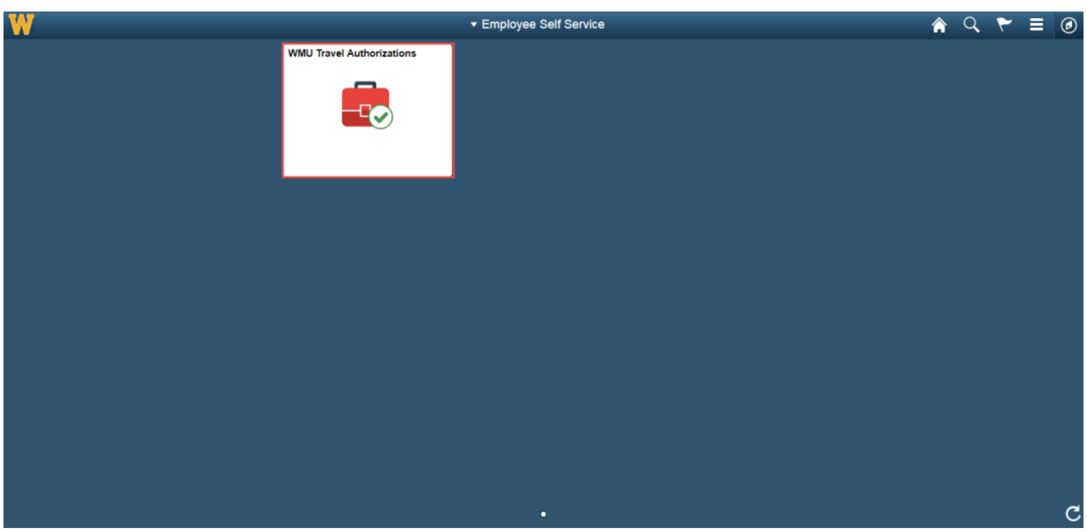
PeopleSoft Financials Self-Service Tile Instructions

1) Log in to the PeopleSoft Financials system through GoWMU. (“My Work” → “All Links” → “Administrative Applications” → “PeopleSoft Administrative Systems” → “PeopleSoft Financials”)

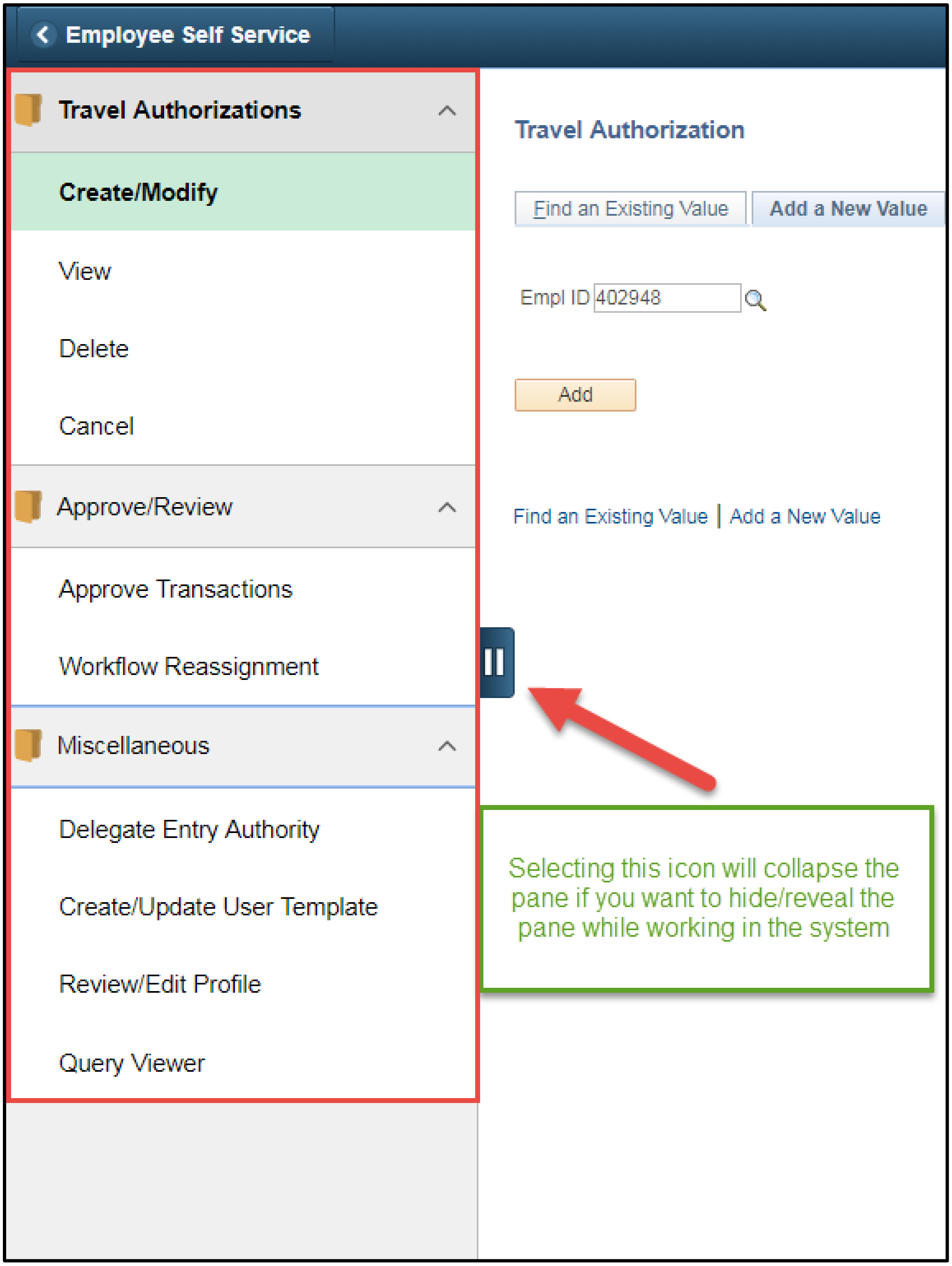


2) On the home screen, you should now see a white tile with the “**WMU Travel Authorizations**” heading. Click on this tile.



3) On the ensuing screen, you should see a navigation pane on the left side of the screen that will take you to several prominent areas within the PeopleSoft Financials system.

- **a. "Travel Authorizations"**
    - **i. "Create/Modify"** – Used to create a new travel authorization ("**Add a New Value**" tab) or to edit a saved authorization that has not yet been submitted (**"Find an Existing Value"** tab)
    - **ii. "View"** – Used to view an authorization from any point after it has been saved. Can also be used to print an authorization or to view where an authorization currently sits in the workflow process.
    - **iii. "Delete" & "Cancel"** – Used to delete or cancel an authorization after it has been fully approved or while still in the "pending" status
- **b. "Approve/Review"**
    - **i. "Approve Transactions"** – If you have the "Approver" or "Reviewer" status and have an authorization that is sitting with you requiring approval, this screen will show you information about the authorizations and allow you to select them to approve. This can also be done by selecting the icon on the top right of the screen.
    - **ii. "Workflow Reassignment"** – If you have the "Approver" or "Reviewer" status and want to have another individual replace you within the workflow you can enter their information into this screen and set a date range to give them authority to do so. This can rather be long term, or if the approver knows they will be on annual or sick leave or away on an assignment for a period of time.
- **c. "Miscellaneous"**
    - **i. "Delegate Entry Authority"** – If you desire to give authority to another individual to create, edit or view authorizations on your behalf, you can enter their information into this screen to give them this authority.
    - **ii. "Create/Update User Template"** – Used to create templates for travel authorizations if desired
    - **iii. "Review/Edit Profile"** – Used to set preferences for defaults while creating travel authorizations
    - **iv. "Query Viewer"** – Used to run miscellaneous reports that provide detailed information about travel authorizations for a specified department


Employee Self Service
Travel Authorizations
Create/Modify
View
Delete
Cancel
Approve/Review
Approve Transactions
Workflow Reassignment
Miscellaneous
Delegate Entry Authority
Create/Update User Template
Review/Edit Profile
Query Viewer
Travel Authorization
Find an Existing Value
Add a New Value
Empl ID 402948
Add
Find an Existing Value | Add a New Value
Selecting this icon will collapse the pane if you want to hide/reveal the pane while working in the system