PEOPLESOFT 9.2

User Guide: Travel & Expenses

Overview

This guide is intended to:

- Define terminology related to the new user interface
- Explore the new features.
- Provide steps on how to navigate and customize CUNYfirst.

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PEOPLESOFT 9.2 & CUNYfirst: Travel & Expense

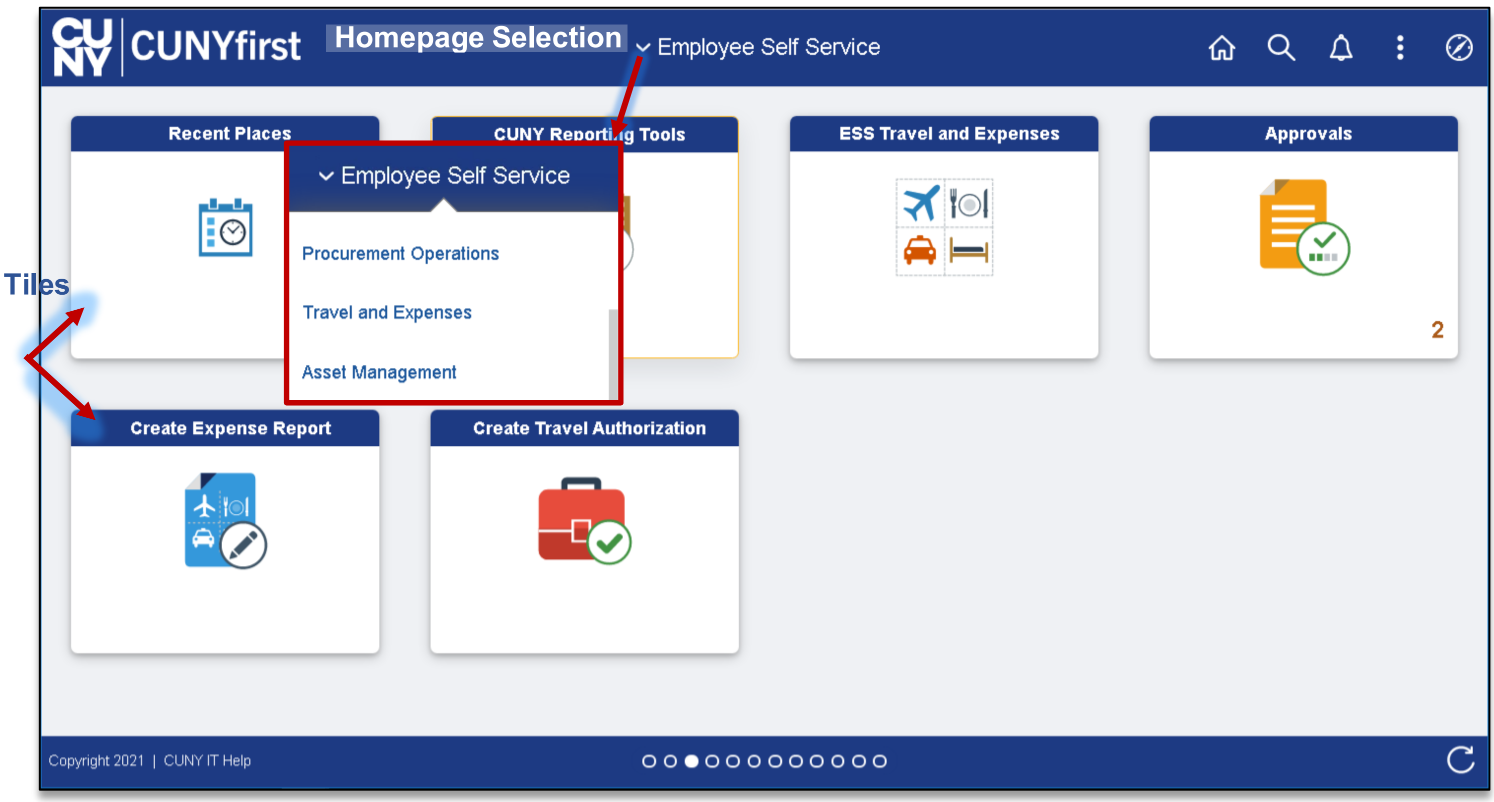
Travel Authorization

With new performance improvements comes new terminology. The definitions below are provided to assist in understanding the PeopleSoft 9.2 upgrade to CUNYfirst.

Fluid – Fluid is a new interface where tiles are added to homepages for navigational ease instead of the Classic cascading pagelets/menus. Fluid is a modern, responsive user interface that provides the flexibility to work seamlessly from desktops, tablets and phones.

Homepage - The landing page for PeopleSoft navigation. A user can have several homepages but only one default (e.g., Employee Self-Service). Homepages can be customized to accommodate your personal interaction with the system. Click on the **Homepage** drop-down arrow to access other component homepages.

Tile – visual navigation component within the fluid interface.



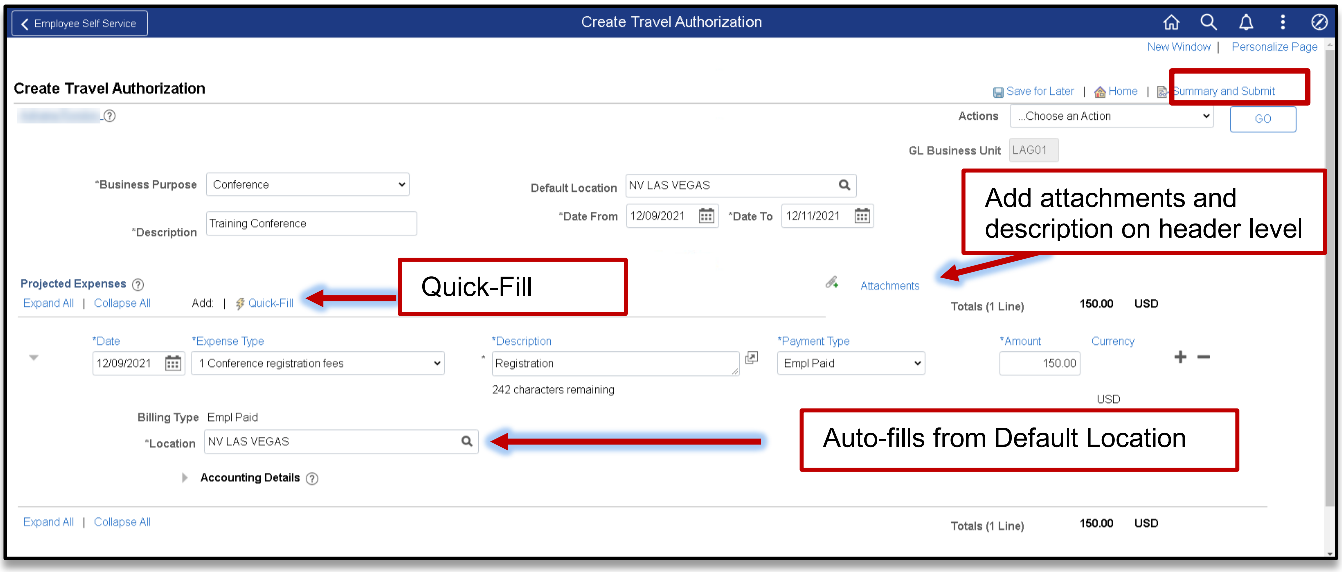
The upgraded CUNYfirst provides access to a fluid and classic navigation interface. The fluid navigation. provides a different look and feel but contains the elements CUNYfirst. The classic navigation provides a similar navigation and page style to your current CUNYfirst system.

Note: Please follow the suggested transaction navigation.

Create Travel Authorization

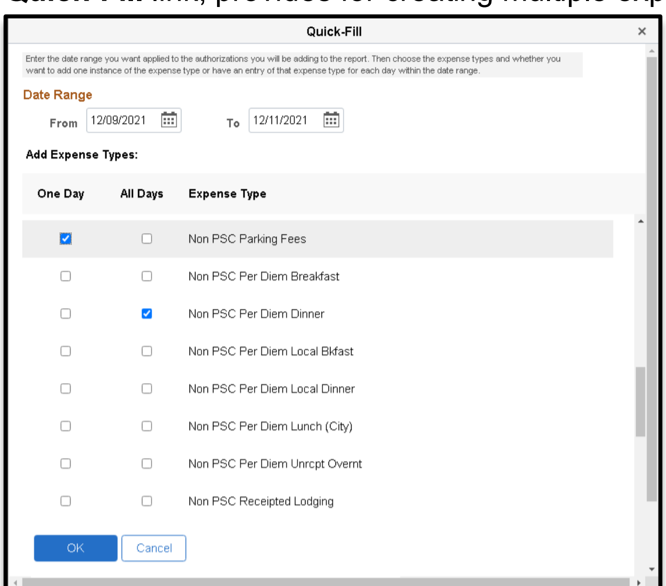
Navigation: **Employee Self-Service** > **ESS Travel and Expenses** > **Travel Authorization** > **Create/Modify**

The **Travel Authorization** search page displays. Depending on your role, the Empl ID will default into the field. If you are authorized to enter a travel authorization on behalf of someone else, enter the Empl ID. Enter the required (Business Purpose, Description and Date From/To) fields to review or create a new Travel Authorization. Use the lookup window to enter the **Default Location**. Once entered, the **Location** field for all Projected Expenses will autofill.



Quick-Fill

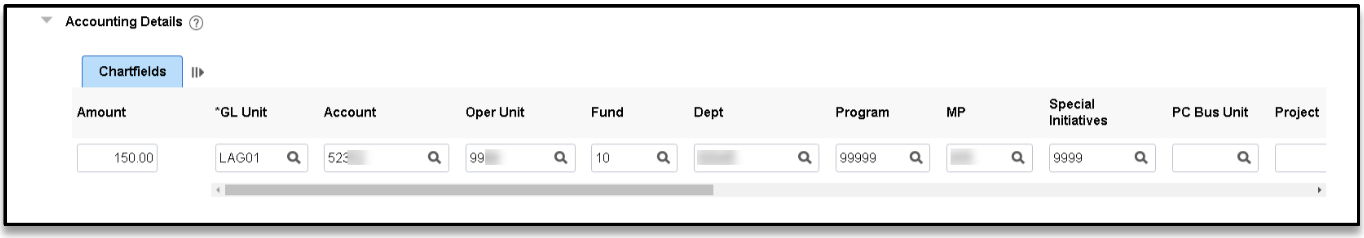
The **Quick-Fill** link, provides for creating multiple expense line at one time.



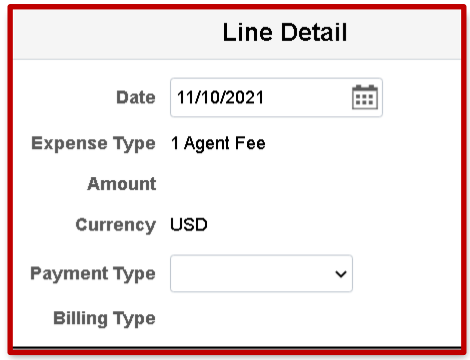
1. Enter the date range.
2. Select the **One Day** checkbox for an Expense Type occurring once. Select the **All Days** check box for Expense Types occurring multiple times.
3. Click **OK** to add lines to the Travel Authorization

Accounting Details

Enter or update the Chartfield information.

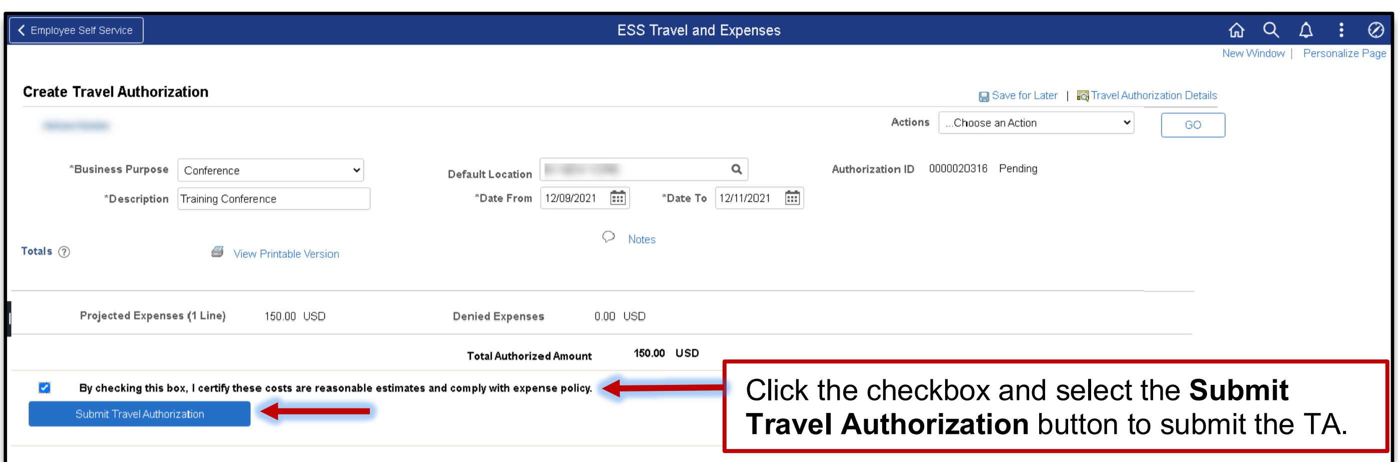


- **Accounting** - enter the accounting details for the expense type selected
- **Details** – enter the line details expense type selected
- **Attachments** – upload line level attachments
- **(+/-**) – add/delete a row



- **Save for Later**– displays the Save Confirmation message and creates Travel Authorization ID for other actions (i.e. Create Cash Advance)
- **Summary & Submit** - displays the Certify Expenses message and begins the approval workflow upon submission

If there are any errors in the travel authorization, a red flag icon displays next to the expense(s) that contains errors. Confirm accounting detail information is correct, the location fields have valid options selected and required fields are completed.



Note: After you submit the travel authorization, you cannot modify it unless an approver returns it to you.