PEOPLESOF 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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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.

Click the checkbox and select the Submit Travel Authorization button to submit the TA.

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