Create Travel Authorization

The employee or their proxy will create a Travel Authorization in CUNYfirst.

All out-of-town travel requires an approved Travel Authorization in CUNYfirst prior to the first travel date.

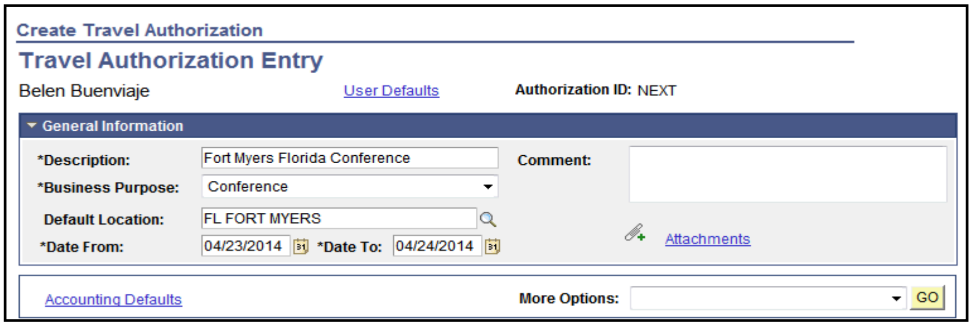
No self-approval of a Travel Authorization is permitted. Travel Authorizations must be approved by the Supervisor of the traveler, as well as, the Department Approvers. The Department Approver/s ensure department budget is encumbered (set aside) for the anticipated travel.

Separate Travel Authorizations are required when a trip is being paid for by more than one Institution.

Step	Action
1.	Enter ***https://home.cunyfirst.cuny.edu*** in your browser's address bar: • Enter your Username and Password and click the **Log In** button. • From the **Enterprise Menu**, select the **Financials Supply Chain** link.
2.	Navigate to: ***Employee Self-Service > Travel and Expense Center > Travel Authorization > Create***.

3.

The **Travel Authorization Entry** page displays. In the **General Information** section, enter the following: **Description**, **Comment**, **Business Purpose**, **Default Location**, **Date From**, and **Date To** fields.



In the **General Information** section **Description** field, enter a brief description of no more than 30 characters to identify this trip.

In the **Comment** field, enter the purpose of the trip in free form text in no more than 10,000 characters.

From the **Business Purpose** dropdown, select the correct list item.

Look up the **Default Location** field which is the destination State and City for your travel.

Note: The Default Location begins with a two digit code for the state.

All Travel Authorizations must be future dated. In the **Date From** field, enter the departure date in the in the mm/dd/yyyy format.

In the **Date To** field, enter the return date in the in the mm/dd/yyyy format.

Click the **Save** button.

Note: Save your work frequently as you enter the projected expenses and attach the required supporting documentation.

4.

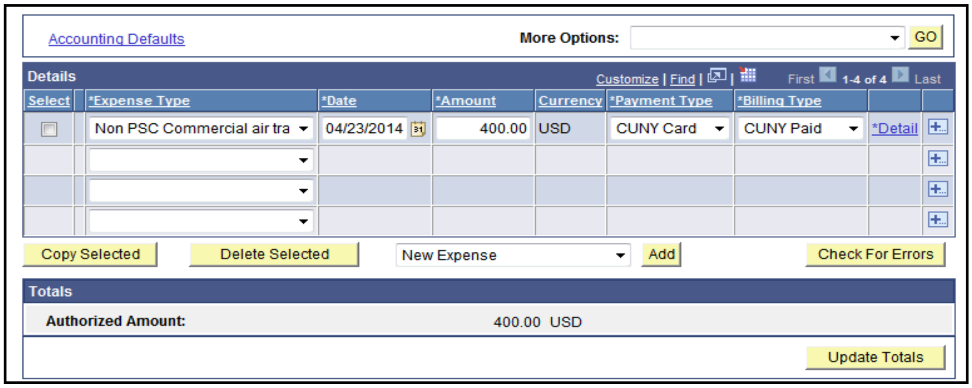
Click the **Accounting Defaults** link to view the ChartField string to be applied to every expense line of the Travel Authorization.

The **Accounting Defaults** page displays. As needed, modify these default accounting ChartFields:

- GL Unit
- Department

Note: Separate expense lines are needed when travel expenses are split among departments.

Click the **OK** button.

5.	The **Travel Authorization Entry** page displays. For each expense line, enter the **Expense Type**, **Date**, **Amount**, **Payment Type**, and **Billing Type** fields.  In the **Details** section from the **Expense Type** dropdown, select the most appropriate list item. ***Note: If the employee is a member of PSC, then select only PSC Expense Types.*** In the **Date** field, enter the future date the expense is expected to be incurred in the mm/dd/yyyy format. In the **Amount** field, enter the total expected expenditure in dollars. On the **Payment Type** and **Billing Type** dropdowns, select matching: • **CUNY Card**/**CUNY Paid** when expenses will be charged to a CUNY issued credit card or • **Empl Paid** when an employee will use their own funds for an expense or • **Non-reimbursable** when an expense is the responsibility of the employee.
6.	Click the **Detail** link to display the **Authorization Detail** page for the **Expense Type**. In the **Description** field, enter a description of no more than 250 characters. For each Expense Type, additional fields may display. If known, enter the related data. ***Note: For example, if the Expense Type is either PSC or Non PSC Mileage, then three additional fields display being: Miles, Originating Location, and Destination Location. After these three fields are entered, click the Calc Mileage button to update the Amount field based on the entered data.***

7.	To change the accounting values for an individual line, click the **Accounting Details** link. On the **Accounting Details** page, as needed, modify these default accounting ChartFields: • **GL Unit** • **Dept** (Department) Click the **OK** button. The **Authorization Detail** page displays. Click the **Return to Travel Authorization Entry** link.
8.	As needed, click the **Add a row** icon to enter more expense lines.
9.	Click the **Attachments** link to upload supporting documentation to justify the expenditure. ***Note: For example, add conference information, anticipated transport (airline, etc.) costs, anticipated hotel rates, and allowed per diem rate.*** The **Travel Auth Attachments** page displays. Click the **Add Attachment** button. The **File Attachment** pop up displays. Click the **Browse** button. Within CUNYfirst, your **Computer** folder displays. Navigate to the documents to be uploaded into CUNYfirst. Click the **Open** button. Click the **Upload** button. ***Note: Documents may be uploaded into a variety of file formats including: .jpg, .pdf, .docx, etc.*** The **Travel Auth Attachments** page displays. In the **Attachment Description** field, enter a brief description of the attachment. Click the **OK** button.
10.	To delete an attachment, on the **Travel Authorization Entry** page, click the **Attachments** link. On the **Travel Auth Attachments** page, identify the row of the attachment to be deleted by **File Name** or **Description**. Click that row's **Delete** button. The **Delete Confirmation** pop up displays this message, "Delete current/selected rows from this page? The delete will occur when the transaction is saved." Click the **OK** button.

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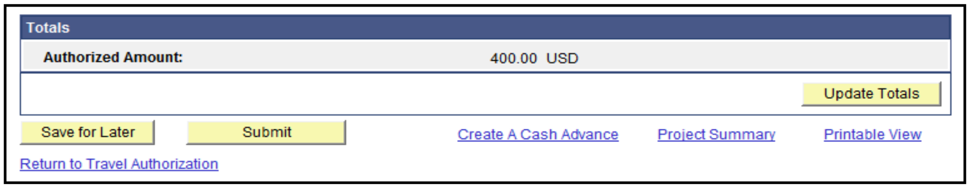

Click the **Save for Later** or **Submit** button.

Note: If all required or major anticipated expenditure is entered and supporting documentation is attached, then click Submit.

Note: In either case, all expense lines will be checked for errors. The Travel Authorization cannot be saved or submitted until all errors are corrected.

If you click the **Submit** button, then the **Submit Confirmation** page displays. Click the **OK** button.
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