

Procurement Other CUNY Credit Card and Expenses

Approve Travel Authorization

Once an employee submits a Travel Authorization, the transaction is routed with email notifications to the employee's Supervisor for approval and then two levels of Department Level approvers.

Supervisors ensure that the travel meets a specified business purpose. Department Approvers ensure budget is available for the anticipated travel.

Step	Action
1.	 Enter <u>https://home.cunyfirst.cuny.edu</u> 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.	On the Universal Navigation Header, click the Worklist link. Note: Alternatively, navigate to: <u>Travel and Expense Center > Approvals ></u> <u>Approve Transactions.</u>
3.	In the Worklist section Link column, select the link for the Travel Authorization you wish to review for approval.
4.	The Travel Authorization Summary page displays. At the bottom of the page beneath the Comments section, the Budget Status must be Valid for the Approval button to display.
	Note: The Budget Check batch process is run hourly weekdays. If the Budget Check status is 'Not Chk'd', then either return to the approval item in an hour or run a manual budget check.
	 Note: To manually run the budget check: 1. Click the Budget Options link. 2. The Commitment Control Page displays. Click the Budget Check button. When there is sufficient budget, then the Budget Checking Header Status field displays 'Valid Budget Check'.
	3. Click the OK button.



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5.	Approve Travel A	uthorization					
	Travel Author	Travel Authorization Summary					
	Belen Buenviaje		User De	aults Au	thorization ID: 0000000216		
	General Information						
	Description:	Meeting in Albany	NY	Cor	mment: See attachments		
	Business Purpose:	Meeting			Meeting invitation Amtrak estimated		
	Status:	Submitted for Appr	oval				
	*Date From:	*Date From: 06/16/2014 To: 06/17/2014 Last Updated: 06/16/2014 By: 11199998					
	Attachments (2)						
	Accounting Defaults More Options:						
	You can deny individu	al expenses and stil	Il approve or se		-		
	Details	arexpenses and su		na back the over		Customize Find д	
	Expense Type	Date	PC BU Project	Activity	Amount Currency	Approve	
	Non PSC Train Ticket		<u>BU</u>		158.00 USD		
	Non PSC Taxi/Car	06/16/2014			50.00 USD		
	Service Non PSC Taxi/Car					_	
	Service	06/17/2014			50.00 USD		
	Totals						
	Total:				258.00 USD		
	Less Non-Approved: 0.00 USD						
	Total Authorized: 258.00 USD						
6.					orting documenta he number of att		
7.	The Travel Auth Attachments page displays. In the File Name column, select a link to view the attachment.						
8.	The attachment displays in a new window. After viewing the attachment, click the						
0.	Close 🔤 but				-		
			pper rigi	t comer t	or the window.		
9.	Click the OK b	utton.					
10.	The Travel Authorization page displays. Click the Accounting Defaults link to view the Department Budget for the entire Travel Authorization.						
	Note: As needed, send back the Travel Authorization with a comment indicating changes to be made to the ChartFields.						
	The Travel Authorization page displays. In the Details section Expense Type column, select the link of a line to review.						
11.					n the Details sect	ion Expense Type	
11. 12.	column, select	the link of a tion Detail	a line to r page for	eview. that line	displays. Click th	ion Expense Type le Accounting Detail	
	column, select The Authoriza link to view the	the link of a tion Detail ChartFields ded, send I	a line to r page for s for this back the	that line expense Travel A	displays. Click th line. Authorization wit	e Accounting Detail	
	column, select The Authoriza link to view the Note: As need	the link of a tion Detail ChartFields ded, send l anges to be	a line to r page for s for this back the	that line expense Travel A	displays. Click th line. Authorization wit	e Accounting Detail	
12.	column, selectThe Authorizalink to view theNote: As needindicating chara	the link of a tion Detail ChartFields ded, send l anges to be utton.	a line to r page for s for this back the e made t	eview. that line expense <i>Travel A</i> o the Cha	displays. Click th line. uthorization wit artFields.	e Accounting Detail	



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15.	The Travel Authorization page displays. As needed, in the Comments section, enter free form text.
	Note: Comments are required when a Travel Authorization is sent back by an approver. The employee or their proxy may modify the Travel Authorization and re-submit it for approval.
16.	Click either the Approve or Send Back buttons.
	Note: Both the Expense User and, if applicable, the proxy that submitted the Expense Report on behalf of the Expense User are notified when the Expense Report is sent back for modification.
17.	The Submit Confirmation page displays. To confirm that the Travel Authorization is approved at your level, click the OK button.
	End of Procedure.