1. **PART 1: OPENING A NEW TRAVEL AUTHORIZATION**
   a. Log into CUNYfirst
   b. Select “Financials Supply Chain”
   c. Select “Employee Self-Service”
   d. Select “Travel and Expense Center”
   e. Select “Travel Authorization”
   f. Select “Create”
   g. Enter the CUNYfirst/Empl ID for the correct individual
   h. Select “Add”
   i. Under the “Quick Start” menu select “A Blank Authorization”

2. **PART 2: GENERAL INFORMATION**
   a. Description (required): This should be a brief description of the travel
      - Robotics Conference in Las Vegas
      - Literary Fiction Conference in Boston
      - Sustainability Workshop in Houston
   b. Business Purpose (required): select from the drop down menu
   c. Default Location
      i. Select the magnifying glass
      ii. Select “Advanced Look Up”
      iii. Under “Description” change the drop down menu to “contains”
      iv. Enter the city name
      v. Select “Look Up”
      vi. Select appropriate location from the resulting list
   d. Date From (required): first day of travel
   e. Date To (required): last day of travel
   f. Comment: Add any details pertinent to your trip
   g. Attachments
      i. Select the “Attachment” link
      ii. Select “Add Attachment”
      iii. Select “Browse”
      iv. Find the document(s) in the pop up window
      v. Select “Okay”
      vi. Select “Upload”
      vii. If you need to attach additional documents return to Step 2.g.i., above
          • Attachments should be in PDF format.
          • Attachments must include:
EASY STEPS TO...

- A signed PDAC Application
- Your award letter
- A brochure or other detailed information about the conference or workshop including dates and locations
- A signed class coverage form

*Please consider saving your work at this point by selecting “Save for Later;” we found that you may be “timed out” due to the length of this process and you don’t want to have to start over every time.*

3. PART 3: DETAILS Each blank line represents an individual travel expense

   a. Under “Expense Type” (required) select the appropriate description of your expense
      Unless otherwise instructed, faculty should select “PSC” item descriptions when appropriate
   b. Enter the anticipated date of the expense (required)
      If unknown, or it is an expense that encompasses the length of trip (i.e.: meals, lodging), use the first date of travel
   c. Enter the estimated amount (required)
      If the expense will be split between two or more Budget Lines see PART 4: SPLITTING EXPENSES, below
   d. Select the “Payment Type” (required) from the drop down menu
      Unless otherwise instructed, the payment type is always “Empl (Employee) Paid”
   e. Select the “Billing Type” (required) from the drop down menu
      Unless otherwise instructed, the payment type is always “Empl (Employee) Paid”
   f. Select the “Detail” (required) link
      i. In the “Description” (required) field enter a brief description of the expense
      ii. Verify that all other required fields are complete
      iii. Select “Accounting Detail”
          1. This is where you can change the Budget Line so that the appropriate account is used to pay for the travel
          2. Unless otherwise instructed, do not change any fields except “Dept”
          3. Enter the appropriate Budget Line in the “Dept” field
             A. Dean’s Offices: SoAS: 80110
                SoPS: 80116
                SoTD: 10385
             B. Department: Please speak directly to your Department Chair
             C. PDAC, change TWO items
                • Dept: 70010
                • Sp Init: 104
             D. Relocation Expenses, change TWO items:
                • Dept: 80250
                • MP: 355
   iv. Select “OK”
   iv. Select “Check Expense For Errors”; errors will be lit in pink
1. If you have any errors please correct them and return to Step 3.f.iv., above
2. If there are no errors select “Return to Travel Authorization Entry”

*Please consider saving your work at this point by selecting “Save for Later;” we found that you may be “timed out” due to the length of this process and you don’t want to have to start over every time.*

v. If you have further items to enter, return to Step 3.a., above
vi. If you have completed entering expenses, continue to Step 3.g., below


g. Select “Check for Errors”; errors will be noted with a pink flag
   i. If you have any errors please correct them and return to Step 3.g., above
   ii. If you have no errors, please continue to Step 3.h., below

h. Select “Submit”

*NOTE: Once a Travel Authorization has been submitted you cannot modify it. If you absolutely must make changes to a submitted Travel Authorization, you must request that your Supervisor reject (“Send Back”) the Authorization.*

4. PART 4: SPLITTING EXPENSES

a. If an expense will be split between two or more Budget Lines, you must enter a detailed line to correspond to each Budget Line; example:
   - Your total anticipated hotel costs are $300.00 for two nights ($150.00 per night).
   - PDAC per diem rates limit you to $200.00 ($100.00 per night)
   - The Dean’s Office has agreed to pick up the additional $100.00 ($50.00 per night)
   - In this case you will enter two expenses lines in the “Details”; one for the PDAC funded costs and one for the Dean’s Office funded costs.

<table>
<thead>
<tr>
<th>Expense Type</th>
<th>Date</th>
<th>Amount</th>
<th>Currency</th>
<th>Payment Type</th>
<th>Billing Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSC Per Diem Unrct Overnt</td>
<td>12/01/16</td>
<td>200.00</td>
<td>USD</td>
<td>Empl Paid</td>
<td>Empl Paid</td>
</tr>
<tr>
<td>PSC Per Diem Unrct Overnt</td>
<td>12/01/16</td>
<td>100.00</td>
<td>USD</td>
<td>Empl Paid</td>
<td>Empl Paid</td>
</tr>
</tbody>
</table>

b. In order to indicate the Budget Line for each expense, you will select the “Detail” link and follow the instructions starting at Step 3.f.i., above

c. If you are using more than two Budget Lines to cover a single expense, simply add the necessary lines for each Budget.

5. IMPORTANT NOTES

a. The PDAC will only cover up to the per diem rate for your given location. Therefore if your estimated expenses are higher than the per diem, you will need to split total costs between the PDAC and the Dean’s Office.

b. In order to verify the per diem rate for your travel location, please go to: http://www.gsa.gov/portal/category/100120

c. The limit for PDAC funds for the Academic Year is $1,500.00. Requests in excess of this amount will be rejected.

d. The limit for Dean’s Office funds varies within each School. Please contact your Dean’s Office to find out the amount. Requests in excess of this amount will be rejected.

e. As this is a Travel Authorization you will be required to enter your expenses upon return. Please see “10 Easy Steps to… Enter Your Expenses” for instructions.