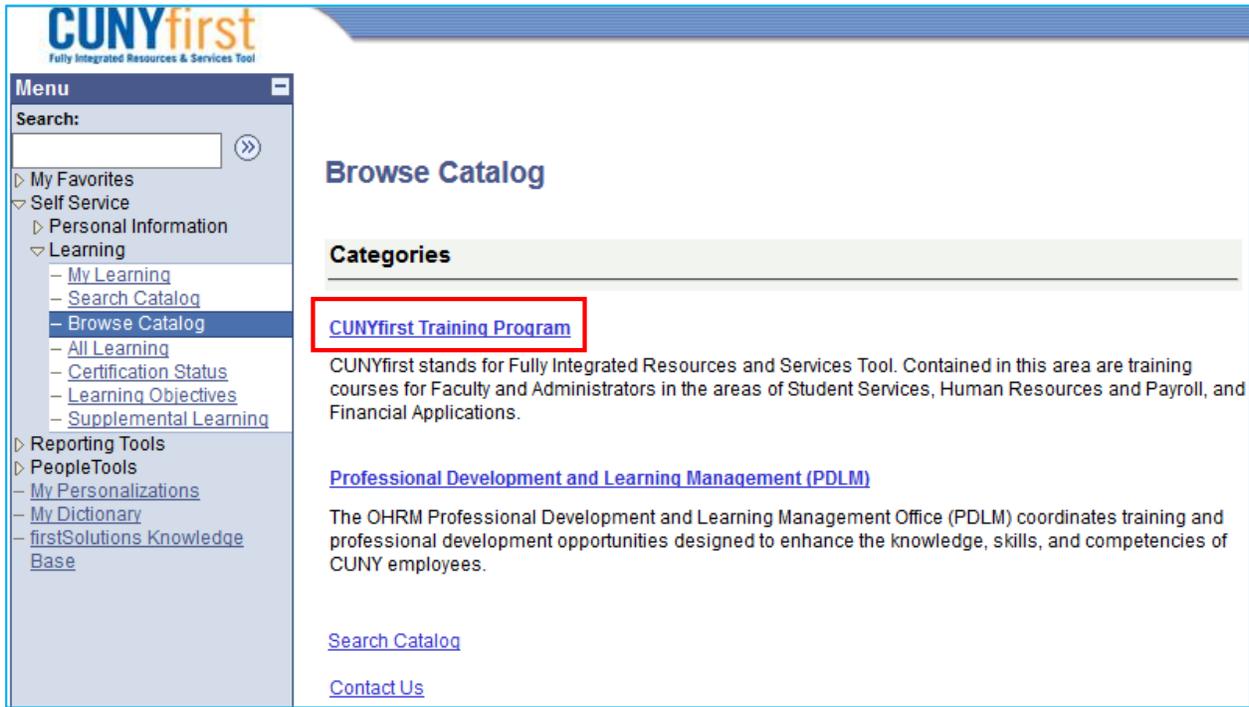


Steps to Enroll for My Wallet Training via CUNYfirst ELM

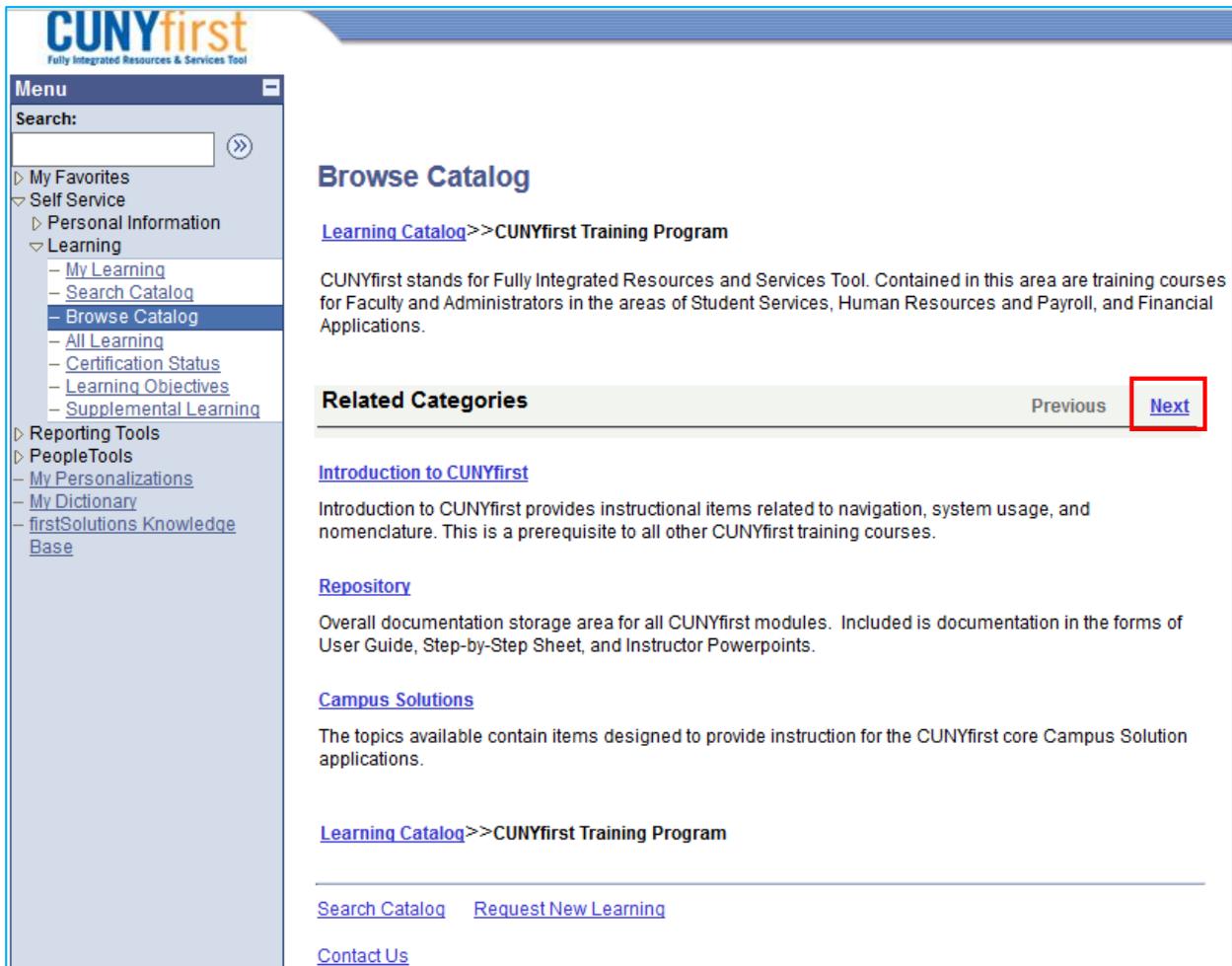
Step#1: Log-in to CUNYfirst (Production) and select Enterprise Learning Management.

Step#2: Navigate to: Self Service > Learning > Browse Catalog; click on **CUNYfirst Training Program**



The screenshot shows the CUNYfirst 'Browse Catalog' page. On the left is a 'Menu' sidebar with a search box and a tree view. Under 'Self Service' > 'Learning', 'Browse Catalog' is selected and highlighted in blue. In the main content area, the 'Categories' section has a link for 'CUNYfirst Training Program' highlighted with a red rectangular box. Below this, there is a paragraph of text about CUNYfirst, a link for 'Professional Development and Learning Management (PDLM)', and another paragraph about the PDLM. At the bottom, there are links for 'Search Catalog' and 'Contact Us'.

Step#3: Click on **Next**



This screenshot shows the CUNYfirst 'Browse Catalog' page after clicking on 'CUNYfirst Training Program'. The 'Learning Catalog' breadcrumb path is now '>>CUNYfirst Training Program'. The 'Related Categories' section has a 'Next' button highlighted with a red rectangular box. Below this, there are three category descriptions: 'Introduction to CUNYfirst', 'Repository', and 'Campus Solutions'. At the bottom, there are links for 'Search Catalog', 'Request New Learning', and 'Contact Us'.

Step#4: Click on Financial Applications

The screenshot shows the CUNYfirst 'Browse Catalog' page. On the left is a 'Menu' sidebar with a search box and a tree view. The 'Learning' section is expanded, and 'Browse Catalog' is selected. The main content area is titled 'Browse Catalog' and contains a breadcrumb trail: [Learning Catalog](#) >> [CUNYfirst Training Program](#). Below this is a paragraph explaining that CUNYfirst stands for Fully Integrated Resources and Services Tool, containing training courses for Faculty and Administrators in Student Services, Human Resources, Payroll, and Financial Applications. A 'Related Categories' section follows, with 'Previous' and 'Next' links. The 'Financial Applications' category is highlighted with a red box; its description states it provides instruction for General Ledger, Planning & Budgeting, and Procurement & Accounts Payable. Other categories shown include 'Human Capital Management Applications' and 'Manager and Employee Self Service'. At the bottom are links for 'Search Catalog', 'Request New Learning', and 'Contact Us'.

Step#5: Click on Credit Card Holders, Travel and Expenses, and Supplier Contracts

The screenshot shows the CUNYfirst 'Browse Catalog' page. The 'Menu' sidebar is identical to the previous screenshot. The breadcrumb trail is: [Learning Catalog](#) >> [CUNYfirst Training Program](#) >> [Financial Applications](#). The 'Financial Applications' category is highlighted with a red box. Its description states it provides instruction for Purchasing Cards, Expenses, and Supplier Contracts, with main topics including reconciling card transactions, creating Travel Authorizations and Expense Reports, and managing Supplier Contracts. Other categories shown include 'Planning and Budgeting' and 'Procurement and Accounts Payable'. At the bottom are links for 'Search Catalog', 'Request New Learning', and 'Contact Us'.

Step#6: Click on **Next**

CUNYfirst
Fully Integrated Resources & Services Tool

Menu

Search:

- My Favorites
- Self Service
 - Personal Information
 - Learning
 - My Learning
 - Search Catalog
 - Browse Catalog**
 - All Learning
 - Certification Status
 - Learning Objectives
 - Supplemental Learning
- Reporting Tools
- PeopleTools
 - My Personalizations
 - My Dictionary
 - firstSolutions Knowledge Base

Browse Catalog

[Learning Catalog](#)>>[CUNYfirst Training Program](#)>>[Financial Applications](#)>>**Credit Card Holders, Travel and Expenses, and Supplier Contracts**

This Category contains items that provide instruction for Purchasing Cards, Expenses, and Supplier Contracts. The main topics include reconciling card transactions, creating Travel Authorizations and Expense Reports, and managing Supplier Contracts.

Catalog Items Previous **Next**

[Establish P-Card Employee Details \(FIN-PRO-001\)](#) [Select](#)

For Vendor Management Unit staff Topics include: Associate Employee to Assigned P-Card; Assign Proxies to Act on Behalf of Card Holder; Enter Default ChartFields.

[P-Card, Travel and Expenses for Purchasing and Accounts Payable \(FIN-PRO-002\)](#) [Select](#)

For Purchasing and Accounts Payable Staff Topics include: Create PrePaid Non-PO Voucher for Incoming Statement; Reconcile P-Card Transactions by Buyer; Approve P-Card Transactions and Expense Reports; Add or Update Travel and Expenses Data.

[Self Service: P-Card, Travel Authorizations, Expense Reports, and Approvals \(FIN-PRO-003\)](#) [Select](#)

For Card Holders, Staff who Travel and other Expense Users Topics include: Reconcile P-Card Transactions; Create, Modify, View or Submit Travel Authorization or Expense Report; Approval Roles for P-Card, Travel Authorization and Expense Report

[Manage Supplier Contracts Library and Contracts \(FIN-PRO-004\)](#) [Select](#)

For staff who manage Supplier Contracts Topics include: Create Clause Class; Add and Update Clause Definitions; Add and Update Configurators; Import Clauses into Contract Library; Approve Clauses in Contract Library

[Author Supplier Contracts \(FIN-PRO-005\)](#) [Select](#)

For staff who author Supplier Contracts Topics include: Search for Ad Hoc or Transactional Contract Document; Create Ad Hoc or Transactional Contract Document; Collaborate on Document; Import Document; Approve Document; Execute Document

[Learning Catalog](#)>>[CUNYfirst Training Program](#)>>[Financial Applications](#)>>**Credit Card Holders, Travel and Expenses, and Supplier Contracts**

[Search Catalog](#) [Request New Learning](#)

[Contact Us](#)

Step#7: Click on **Travel Authorizations and Expense Reports with a T-Card (FIN-PRO-008)**

CUNYfirst
Fully Integrated Resources & Services Tool

Menu

Search:

- My Favorites
- Self Service
 - Personal Information
 - Learning
 - My Learning
 - Search Catalog
 - Browse Catalog**
 - All Learning
 - Certification Status
 - Learning Objectives
 - Supplemental Learning
- Reporting Tools
- PeopleTools
 - My Personalizations
 - My Dictionary
 - firstSolutions Knowledge Base

Browse Catalog

[Learning Catalog](#)>>[CUNYfirst Training Program](#)>>[Financial Applications](#)>>**Credit Card Holders, Travel and Expenses, and Supplier Contracts**

This Category contains items that provide instruction for Purchasing Cards, Expenses, and Supplier Contracts. The main topics include reconciling card transactions, creating Travel Authorizations and Expense Reports, and managing Supplier Contracts.

Catalog Items [Previous](#) [Next](#)

[Travel Authorizations and Expense Reports with a T-Card \(FIN-PRO-008\)](#) [Select](#)

- Expenses Set-Up - T-Card Travel Authorizations - View T-Card Expenses in My Wallet - T-Card Expense Reports without or with a Travel Authorization

[Learning Catalog](#)>>[CUNYfirst Training Program](#)>>[Financial Applications](#)>>**Credit Card Holders, Travel and Expenses, and Supplier Contracts**

[Search Catalog](#) [Request New Learning](#)

[Contact Us](#)

Step#8: Click on Enroll

CUNYfirst
Fully Integrated Resources & Services Tool

Menu

Search:

- My Favorites
- Self Service
 - Personal Information
 - Learning
 - My Learning
 - Search Catalog
 - Browse Catalog**
 - All Learning
 - Certification Status
 - Learning Objectives
 - Supplemental Learning
- Reporting Tools
- PeopleTools
 - My Personalizations
 - My Dictionary
 - firstSolutions Knowledge Base

Travel Authorizations and Expense Reports with a T-Card

Description:

- Expenses Set-Up - T-Card Travel Authorizations - View T-Card Expenses in My Wallet - T-Card Expense Reports without or with a Travel Authorization

The table below shows the different delivery options and start dates for Travel Authorizations and Expense Reports with a T-Card. You can view the complete activity details by clicking the View Details link. You can enroll in the activity by clicking the Enroll button or bookmark the activity to view later in your Planned Learning page by clicking the Add to Plan button.

Please note that activities without a specified Start Date can be taken at any time.

Activity Code	Type	Start Date	Price		Add to Plan
Procurement My Wallet	Blended		0.00 USD	View Details	Enroll Add to Plan

[Add Item To Plan](#) [Return to Previous Page](#) [Contact Us](#)

Step#9: Click on Submit Enrollment

CUNYfirst
Fully Integrated Resources & Services Tool

Menu

Search:

- My Favorites
- Self Service
 - Personal Information
 - Learning
 - My Learning
 - Search Catalog
 - Browse Catalog**
 - All Learning
 - Certification Status
 - Learning Objectives
 - Supplemental Learning
- Reporting Tools
- PeopleTools
 - My Personalizations
 - My Dictionary
 - firstSolutions Knowledge Base

Enroll In Activity

Review Information

Activity Name: [Travel Authorizations and Expense Reports with a T-Card](#) **Type:** Blended
Activity Code: Procurement My Wallet **Contact:** [Adante Harvey](#)
Price Per Seat: 0.00 USD **Drop Charge:** 0.00 USD

Start Date: 04/15/2016 **End Date:** --
Last Enrollment Date: -- **Last Drop Date:** --
Available Seats: -- **Available Waitlist:** 0

Language: English

Job Selection

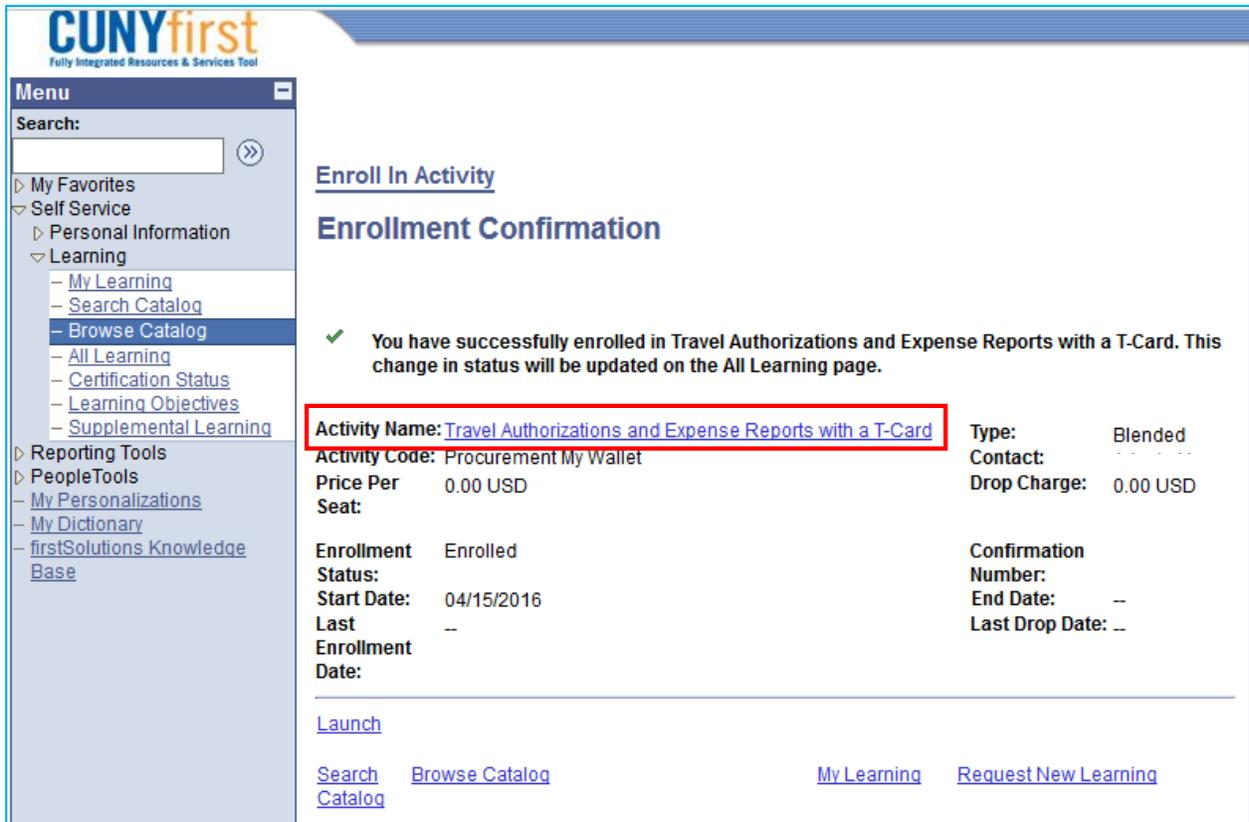
Please select the job that you wish to associate this enrollment to.

*Job Title

* Required Field

Submit Enrollment [Search Catalog](#) [Browse Catalog](#)

Step#10: Click on **Travel Authorizations and Expense Reports with a T-Card** link to access the training



CUNYfirst
Fully Integrated Resources & Services Tool

Menu

Search:

- My Favorites
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 - My Learning
 - Search Catalog
 - Browse Catalog**
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 - Certification Status
 - Learning Objectives
 - Supplemental Learning
- Reporting Tools
- PeopleTools
 - My Personalizations
 - My Dictionary
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Enroll In Activity

Enrollment Confirmation

✓ You have successfully enrolled in Travel Authorizations and Expense Reports with a T-Card. This change in status will be updated on the All Learning page.

Activity Name: Travel Authorizations and Expense Reports with a T-Card **Type:** Blended

Activity Code: Procurement My Wallet **Contact:** ...

Price Per Seat: 0.00 USD **Drop Charge:** 0.00 USD

Enrollment Status: Enrolled **Confirmation Number:** ...

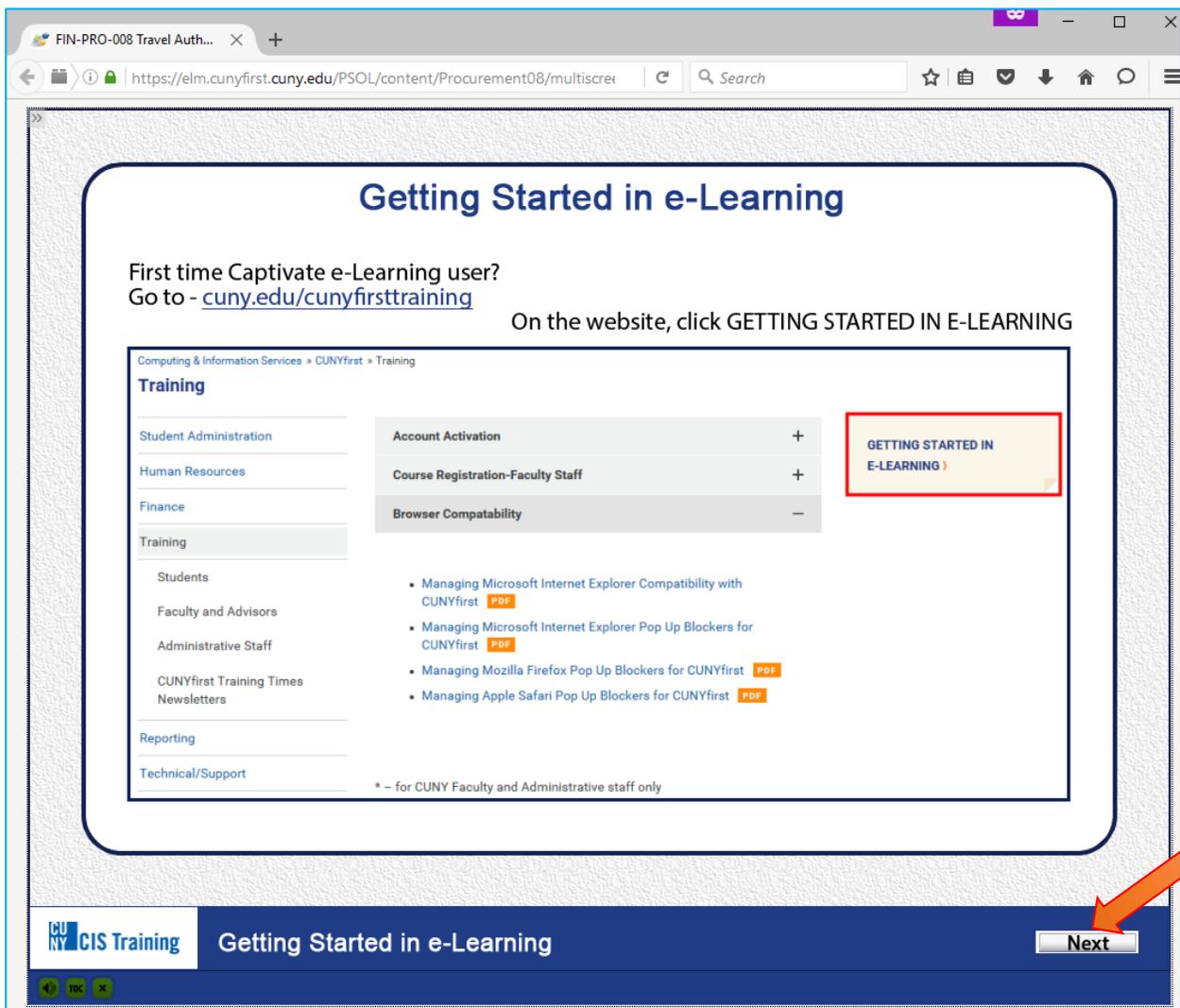
Start Date: 04/15/2016 **End Date:** --

Last Enrollment Date: -- **Last Drop Date:** --

[Launch](#)

[Search Catalog](#) [Browse Catalog](#) [My Learning](#) [Request New Learning](#)

Step#11: Course Launches



FIN-PRO-008 Travel Auth... x +

https://elm.cunyfirst.cuny.edu/PSOL/content/Procurement08/multiscre...

Getting Started in e-Learning

First time Captivate e-Learning user?
Go to - cuny.edu/cunyfirsttraining On the website, click GETTING STARTED IN E-LEARNING

Computing & Information Services > CUNYfirst > Training

Training

- Student Administration
- Human Resources
- Finance
- Training
 - Students
 - Managing Microsoft Internet Explorer Compatibility with CUNYfirst PDF
 - Managing Microsoft Internet Explorer Pop Up Blockers for CUNYfirst PDF
 - Managing Mozilla Firefox Pop Up Blockers for CUNYfirst PDF
 - Managing Apple Safari Pop Up Blockers for CUNYfirst PDF
 - Faculty and Advisors
 - Administrative Staff
 - CUNYfirst Training Times Newsletters
- Reporting
- Technical/Support

* - for CUNY Faculty and Administrative staff only

GETTING STARTED IN E-LEARNING

CU NY CIS Training Getting Started in e-Learning **Next**

Note: Users can always access the course(s) that they have enrolled for via 'My Learning' link within Self Service under CUNYfirst ELM

