

PEOPLESOFT 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.

Note: CUNYfirst System Requirements

The PeopleSoft 9.2 upgrade introduces new cookies for your web browser that can affect how CUNYfirst is displayed in terms of fonts, colors or page layout.

Clearing your web browser's **cuny.edu** site cookies and restarting the web browser before logging into CUNYfirst fixes these display issues. See the following web pages for instructions on clearing the cuny.edu cookies from your web browser:

- [Clear cookies and site data in Firefox](#) – follow the instructions to “Clear cookies for any website”
- [Delete cookies in Microsoft Edge](#) – follow the instructions to “Delete cookies from a specific site”
- [Clear, enable and manage cookies in Chrome](#) – follow the instructions to “Delete cookies from a site”
- [Manage cookies and website data in Safari on Mac](#) – follow the instructions to “Remove stored cookies and data.”

Firefox is the recommended browser for CUNYfirst

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PEOPLESOFT 9.2 & CUNYfirst: Travel & Expense

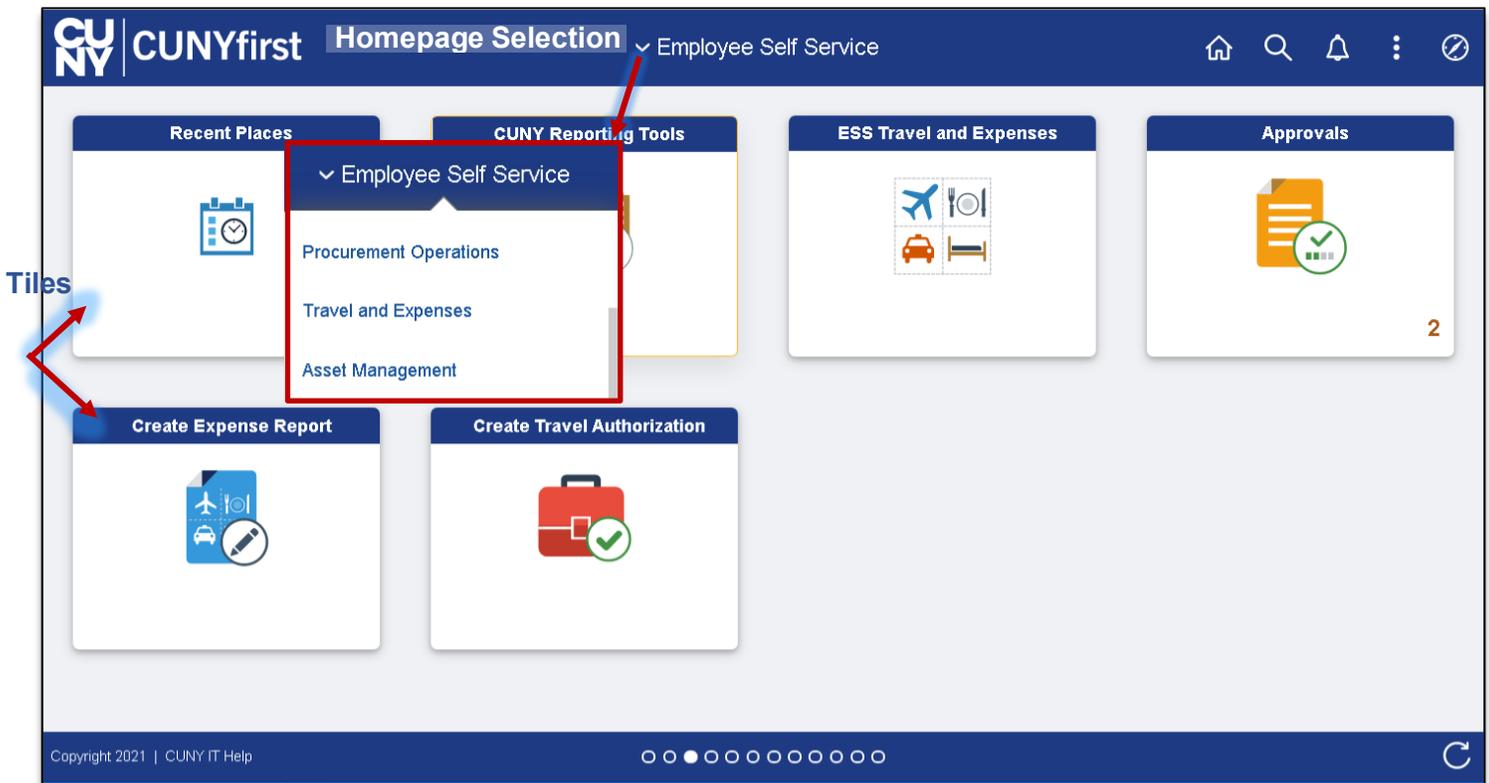
Travel Authorization

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.



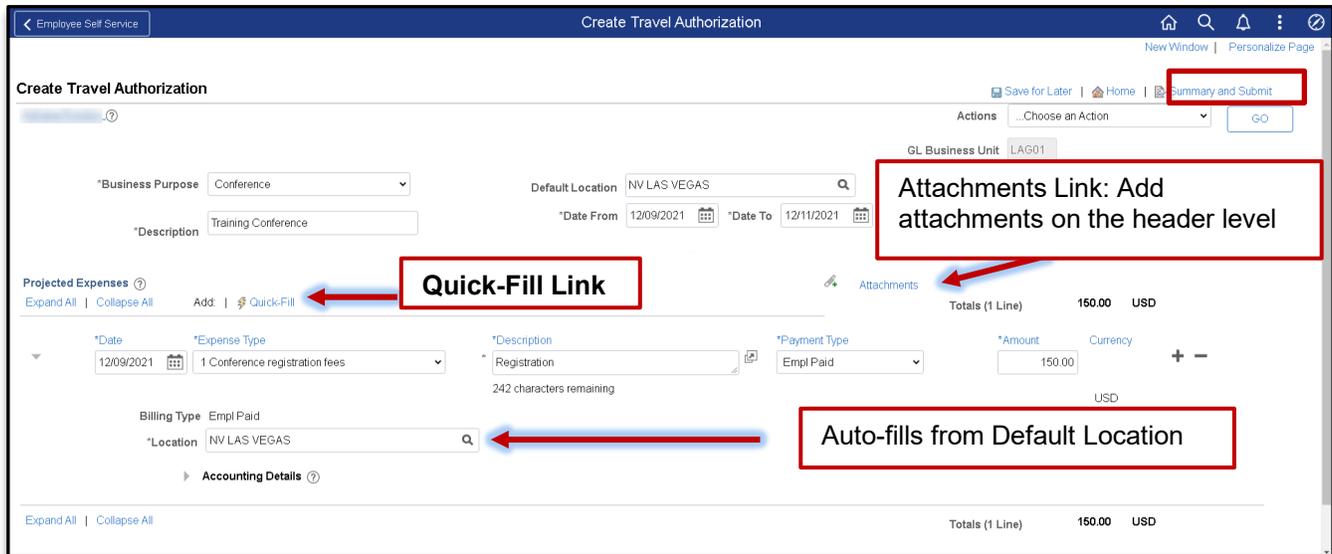
The upgraded CUNYfirst provides access to a fluid and classic navigation interface. The fluid navigation provides a different look and feel but contains the elements CUNYfirst. The classic navigation provides a similar navigation and page style to your current CUNYfirst system.

Note: Please follow the suggested transaction navigation.

Create Travel Authorization

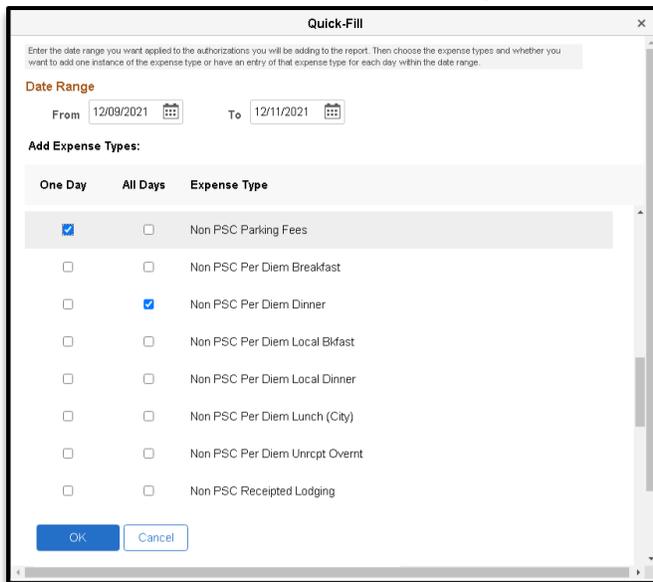
Navigation: **Employee Self-Service > ESS Travel and Expenses > Travel Authorization > Create/Modify**

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. **Note:** The attachment file name must **not** contain special characters (specifically, ; _ <> @ / * \$ % & ? + : ^ + = | () { ' " " # ~ <> , !).
- **(+/-)** – 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. **Note:** The **Certify Expenses** page provides for entering required general comments/justification information for the transaction.

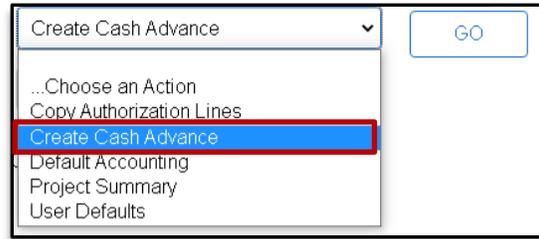
If there are any errors in the travel authorization, a red flag icon displays next to the expense(s) that contains errors. Confirm accounting detail information is correct, the location fields have valid options selected and required fields are completed.

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

Create Cash Advance (Only for NTL)

Navigation: Employee Self-Service > ESS Travel and Expenses > Cash Advances > Create/Modify

Note: A cash advance can also be created at the time of creating a Travel Authorization.



The **Cash Advance** search page displays.

Select **Submit Cash Advance** to begin the workflow approval process. Select **Save for Later** to save the Cash Advance without submitting for approval. The cash advance may be saved with or without invalid or missing information and can be modified later. The **Save Confirmation** page displays to indicate that it successfully saved the Cash Advance and indicates if missing or invalid information exists.

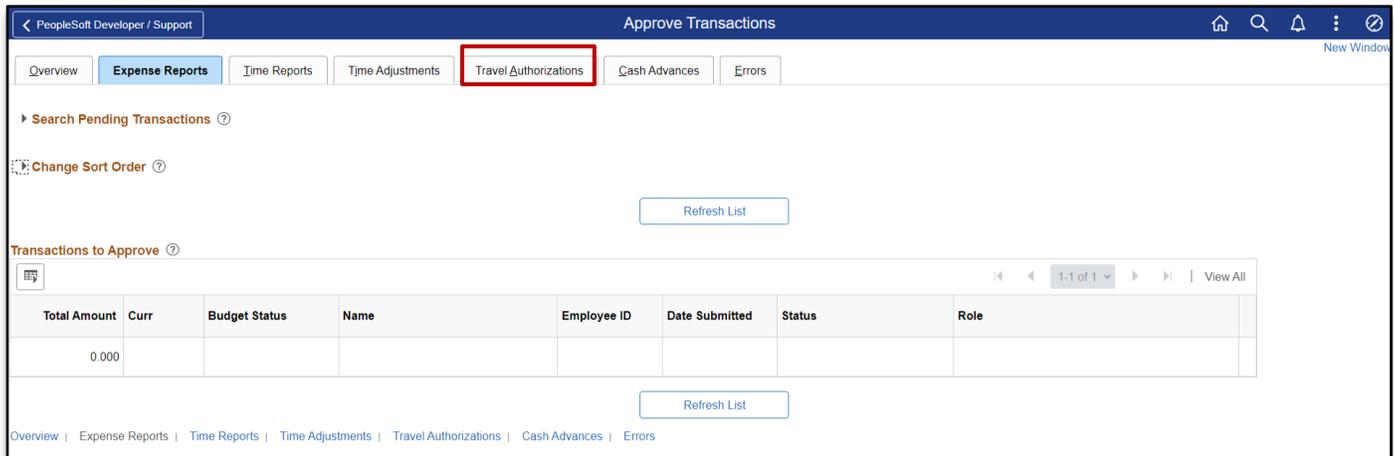
ACH Navigation

Navigation: Navigator > NavBar > ESS Travel and Expenses > Add/Update Bank Account

Approve Travel Authorization

Navigation: **Nav Bar > Navigator > Travel and Expenses > Approve Transactions > Approve Transactions**

Opening the travel authorization provides access to expense type and the details related to the expense. Clicking on the expense type displays the detail screen for that expense. By selecting the expense type, the approver can review the details of each individual expense and change the information, if necessary. The **Accounting Detail** link displays the specific account expense associated with the selected line.



The expense report opens in **Expense Summary View** and most of the information can be reviewed on this page. Use the **Expense Detail View** to review accounting lines. Complete the approval by following the current CUNYfirst process.

Approve Travel Authorization

Travel Authorization Summary

Xoan User Defaults

General Information

Description	I	Authorization ID	0000004064
Business Purpose	User Conference	Reference	8875309
Status	Submitted for Approval	Updated on	03/26/2019 9:10:36AM
Date From	04/01/2019	To	04/05/2019
		By	101007145

Accounting Defaults More Options

You can deny individual expenses and still approve or send back the overall report.

Details

Expense Type	Date	PC Business Unit	Project	Activity	Amount	Currency	Approve
Meal outside of WA Lunch	04/01/2019				18.00	USD	<input checked="" type="checkbox"/>

Totals

Total	18.00 USD
Less Non-Approved	0.00 USD
Total Authorized	18.00 USD

Pending Actions

Role	Name	Action	Date/Time
HR Supervisor	Paul		
Prepay Auditor	(Pooled)		

Action History

Role	Name	Action	Date/Time
Employee	Xoan	Submitted	03/26/2019 9:10:36AM

Comments

Budget Checking is required before the Travel Authorization can be Approved. Please click on the Budget Options hyperlink.

[Budget Options](#) Budget Status Not Budget Checked **Budget Check**

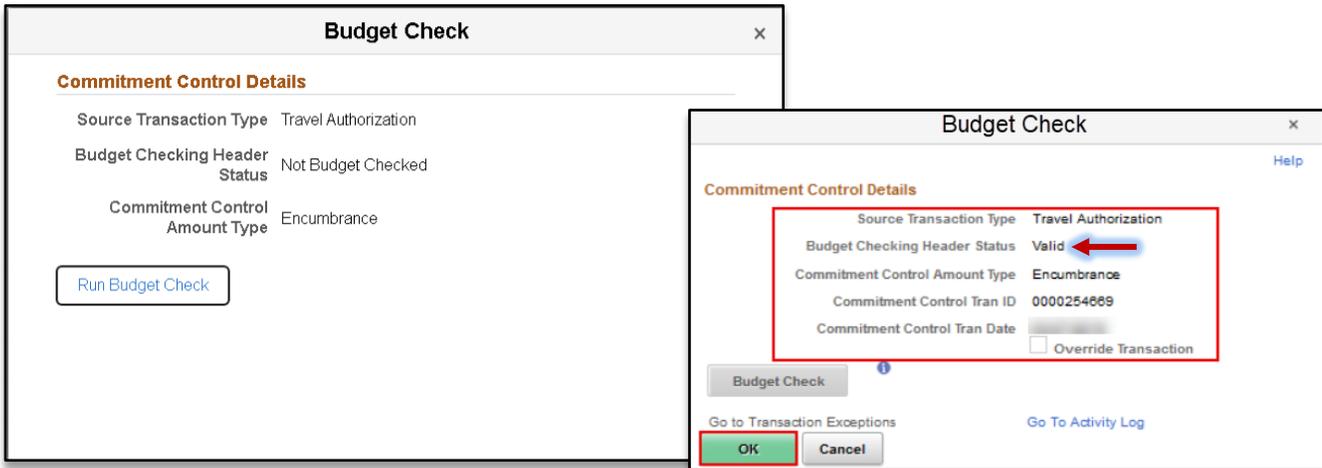
[Return to Approval List](#)

The approver reviews the travel authorization and selects the appropriate action:

- **Approve** – Forwards the authorization on in the workflow and prompts for the budget check
- **Deny** – Immediately ends the authorization workflow, however, the authorization is still able to be viewed or printed



Note: at least one line must be selected to take action.



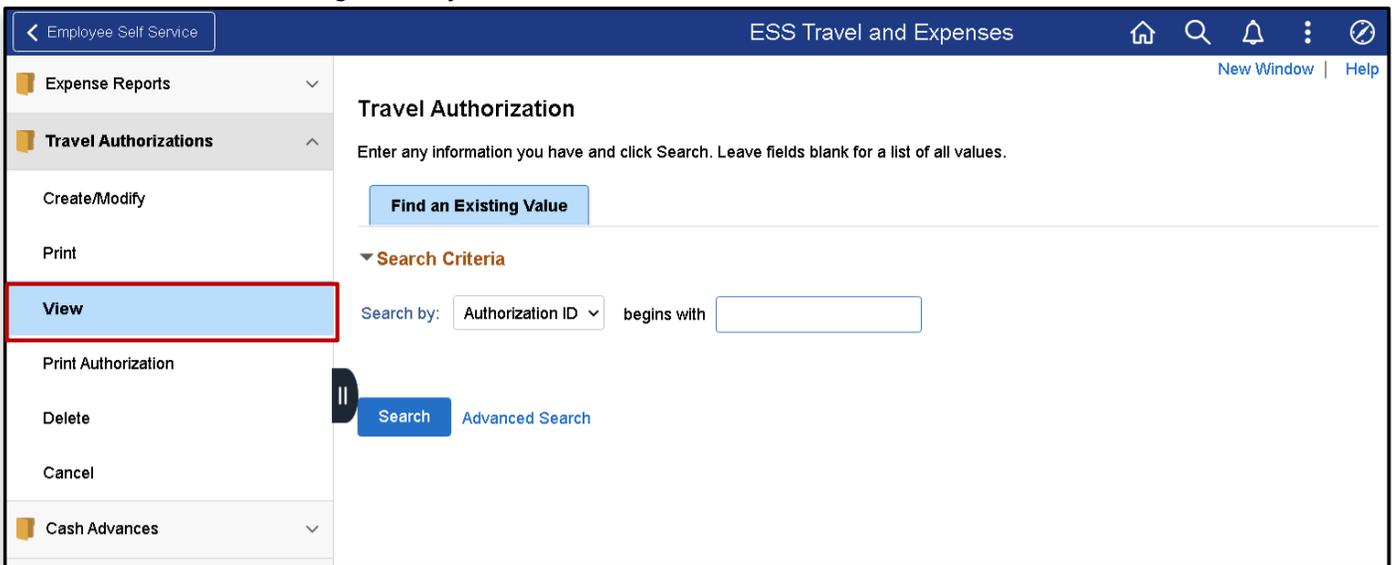
After reviewing the information and you are ready to approve the transaction, click the **Budget Options** button to access the **Commitment Control Details** window. Click the **Budget Check** button to run the budget.

Upon successfully running the budget (i.e., Valid status), click the **OK** button to continue to return to the Travel Authorization window and click the **Approve** button to continue the submission process.

View Travel Authorization

Navigation **NavBar**> **Navigator** > **Employee Self-Service** > **Travel and Expenses Center** > **Travel Authorizations** > **View**

Click the **Search** button to locate the travel authorization. The results include authorizations that you created as well as authorizations delegated to you.



Employee Self Service | ESS Travel and Expenses

Travel Authorization

Business Purpose: Conference
 Description: 2020 NASFAA Conference
 Default Location: NV LAS VEGAS
 Date From: [] Date To: []
 Reference: []

Authorization ID: []
 Created: []
 Last Updated: []

Totals: Projected Expenses (11 Lines) 1,932.10 USD
 Denied Expenses 0.00 USD
 Total Authorized Amount 1,932.10 USD

By checking this box, I certify these costs are reasonable estimates and comply with expense policy.
 Submit Travel Authorization Submitted On []

Approval History

Submitted [] Approver [] Supervisor []

Action	Role	Name	Date/Time
Submitted			01/14/2020 5:05:37PM
Approved	Supervisor		01/15/2020 11:30:30AM

Travel Authorization Details

Projected Expenses (11 Lines) 1,932.10 USD

*Date	*Expense Type	*Description	*Payment Type	*Amount	Currency
06/28/2020	1 Conference registration fees	conference registration	TCard	629.00	USD

Billing Type: TCard
 Location: NV LAS VEGAS

Accounting Details

Amount	GL Unit	Account	Oper Unit	Fund	Dept	Program	MP	Special Initiatives	PC Bus Unit	Project	Activity
629.00			3008	11			300	9999			

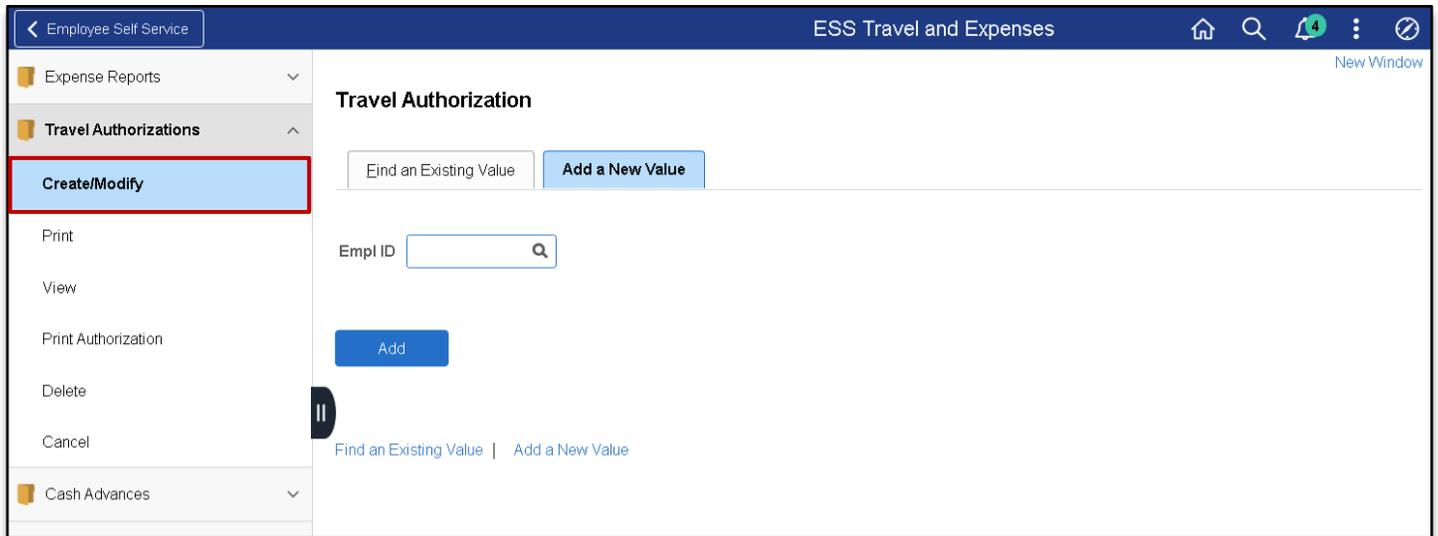
- Travel Authorization Details** – select to see the expense details
- Print** – select this button to print a PDF copy of the authorization
- Approval History** – provides the current status of where the authorization is in the approval workflow

Modify Travel Authorization

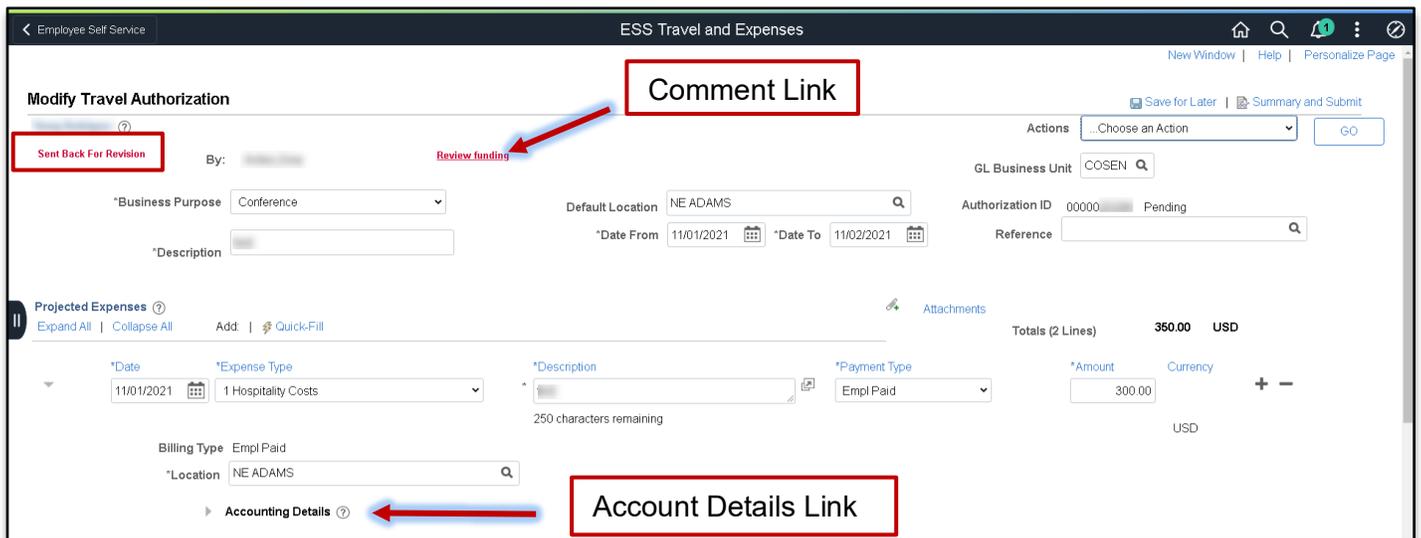
Navigation: **Employee Self-Service Center > ESS Travel and Expenses > Travel Authorizations > Create/Modify**

A travel authorization may be modified:

- Before the authorization has been submitted for approval. If the authorization has been saved (but not submitted).
- After the authorization has been submitted, and then subsequently **sent back** by an approver. If the authorization is sent back, the approver is required to add a comment to provide further instructions on how to change the authorization.



Select the **Find an Existing Authorization** tab and click the **Search** button to display modifiable authorizations.



A travel authorization that has been sent back by an approver, displays a red **Sent Back For Revision** message at the top of the authorization along with the approver's comments (click on the red hyperlink to review the comment).

If the travel authorization has never been submitted, the red text will not display and you can update the authorization (add or delete lines, change amounts, dates, locations, etc.) for submission.

Expense Report

Create Expense Report

Navigation: **Employee Self-Service > ESS Travel and Expenses > Expense Reports > Create/Modify**

When you create an expense report, you can start with a blank expense report or populate one with data from another source. To populate the expense report with an approved travel authorization, enter the date range and select **Search** to find the approved travel authorization. Select a travel authorization from the results and click the **Return** button to continue to the **Expense Report** page.

Copy from Approved Travel Authorization

From Date: 07/31/2021 To: 11/30/2021 **Search**

Travel Auth Description	Authorization ID	GL Business Unit	Date From	Date To	Amount	Currency
					0.000	

Click Return to access a new Expense Report → **Return**

Create Expense Report

*Business Purpose: Non-Travel Expense Default Location: NY ALBANY

*Report Description: NYSTA

Reference: [Search]

Expenses: Add **My Wallet (0)** Quick-Fill

Add attachments and description on header level → Attachments (0)

My Wallet Link - import card entries into the report

*Date: 11/15/2021 *Expense Type: 1 Membership costs *Description: Membership *Payment Type: Empl Paid *Amount: 500.00 *Currency: USD

Billing Type: Empl Paid *Location: NY ALBANY

Accounting Details

Chartfields

Amount	*GL Unit	Monetary Amount	Currency Code	Exchange Rate	Account	Oper Unit	Fund	Dept	Program	MP
500.00	COSEN	500.00	USD	1.00000000		9999			99999	

...Choose an Action

- Adjustment Cash Advance
- Apply/View Cash Advance(s)
- Associate Travel Authorization
- Copy Expense Lines
- Default Accounting For Report
- Expense Report Project Summary
- Export to Excel
- User Defaults

Note: The Quick-fill link may be used to add multiple expenses.

- **Accounting** - enter the accounting details for the expense type selected
- **Details** – enter the line details expense type selected
- **Attachments** – upload line level attachments. **Note:** The attachment file name must **not** contain special characters (specifically, ; _ < > @ / * \$ % & ? + : ^ + = | () { } ' " # ~ < > , !).
- **(+/-)** – add/delete a row
- **Save for Later**– displays the Save Confirmation message and creates Expense Report ID for other actions
- **Summary & Submit** - displays the Submit Confirmation message and begins the approval workflow

If there are any errors in the expense report, 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.

My Wallet (Link)

My Wallet stores credit card and user-entered expense transactions that you can apply to expense reports, thus saving data entry time. Use the **My Wallet** page to select unassigned credit card transactions to add to expense reports. Use the **VISA Transaction** link and change the Expense Type to the correct expenditure (e.g., PSC Parking Fees, PSC Per Diem Dinner, etc). **Note: Modifications to the wallet entry must be completed before adding the wallet entry to the Expense Report.**

Select the wallet transaction(s) and click the **Done** button to add the wallet entry to the Expense Report.

ESS Travel and Expenses

Create Expense Report

My Wallet

Report ID NEXT

Below is a complete list of unassigned wallet transactions. To view all transactions please go to the wallet menu option under "Other Expense Functions".

Select All Deselect All

Select items and select if a Personal Expense. Press 'Done' to add them to the expense report.

Unassigned Wallet Entries

Select	Logo	Date	Expense Type	Merchant	Amount	Currency	Non-Reimbursable
<input type="checkbox"/>			VISA Transactions	RESORT TRAVEL	975.00	USD	<input type="checkbox"/>
<input checked="" type="checkbox"/>			1 Conference registration fees	RESORT TRAVEL	25.00	USD	<input type="checkbox"/>

Done

Add wallet entry to the Expense Report

My Wallet selected transactions are added as expense lines to the expense report. Complete the expense lines as needed. If you copied from a Travel Authorization, delete the duplicate line(s) and click the **Save for Later** or **Summary and Submit** link to continue the approval process.

Save for Later/Summary and Submit

Expense Lines and Chartfields

Amount	*GL Unit	Monetary Amount	Currency Code	Exchange Rate	Account	Oper Unit	Fund	Dept	Program	MP
500.00	COSEN	500.00 USD	1.00000000			9999			99999	

The **Certify Expenses** page provides for reviewing and confirming the information for the transaction. Additionally, the **Notes** field is located on this page and provides for entering required general comments/justification information for the transaction.

Enter the comment information and review the transaction to submit for approval.

Notes Link

Submit Expense Report

Click the checkbox and select the **Submit Expense Report** button to submit the expense report.

View Expense Report

Navigation **NavBar**> **Navigator** > **Employee Self-Service** > **Travel and Expenses Center** > **Expense Report** > **View**

Enter the search criteria and click the **Search** button. Select the applicable Expense Report from the results.

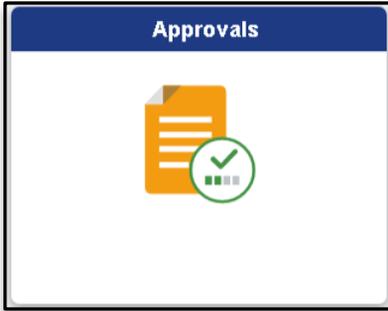
Review the details of the expense report. The report contains the Travel Authorization ID, attachments and accounting detail information.

Note: The file name for all attachments should not contain special characters (e.g., &, \$, #, etc.).

Approvals

Navigation: **Recruiting Homepage > Approvals Tile**

The **Pending Approvals** page provides for acting on all pending approvals and those related to travel and expense activities (e.g., travel authorizations, expense reports, etc.) using fluid approvals.



Employee Self Service Pending Approvals

View By: Type

- All (75)
- Expense Report (7)
- Voucher (68)

Expense Report		7 rows
Expense Report	529.03 USD	Routed 03/20/2019 >
Expense Report	108.00 USD	Routed 01/19/2022 >
Expense Report	95.00 USD	Routed 01/25/2022 >
Expense Report	434.00 USD	Routed 01/25/2022 >
Expense Report	257.08 USD	Routed 01/27/2022 >
Expense Report	95.00 USD	Routed 02/01/2022 >
Expense Report	150.00 USD	Routed 02/01/2022 >

Access Approval Detail

The screenshot shows a list of pending expense reports. A red box highlights the text 'Access Approval Detail' with a red arrow pointing to the right-hand side of the table, specifically towards the 'Routed' status and date column of the highlighted row.

Expense Report

Prior to approving the expense report, approvers must complete a thorough review of the transaction details. Approvers may access attachments, comment information and the travel authorization (e.g., Report ID 0000001234) for travel related expenses.

The screenshot shows the 'Expense Report' interface. At the top, it displays '95.00 USD' and '1 line(s) are pending your approval'. A summary section includes fields for Name, Total Due Employee (95.00 USD), Report Description (conference registration), Business Purpose (Conference), and Location (NY NEW YORK). A 'Report ID' is highlighted with a callout: 'Report ID contains the TA reference information and is required for travel related expenses'. Below the summary, there are sections for 'Attachments and Notes' (with 'View Attachments' and 'View Notes' links) and 'Lines'. A callout points to 'View Attachments' with the text 'Review attachments (e.g., receipts, authorization letter)'. Another callout points to the 'Lines' section with 'Review general comments/justifications'. A table of expense lines is shown with columns: Select, Date/Expense Type, Reimbursement Amount, Receipt Required, and Receipt Attached. The first row shows a date of 05/27/21 for '1 Conference registration fees' with a reimbursement amount of 95.00 USD, receipt required 'N', and receipt attached 'Y'. A callout points to the 'Expense Details' link with 'Displays Expense Summary'. At the bottom, there are fields for 'Approver Comments' and 'Approval Chain'.

Attachments

The 'Attachments' window displays details for Report ID 00000 and Report Description conference registration. It shows a list of attachments:

Sequence	Attached File	Description	Entered by	Updated on
1	_registration.pdf	registration receipt		05/27/21 4:52PM
2	AssocDeanletter.pdf	Associate Dean letter authorizing expense		05/27/21 4:52PM

Notes

The **Notes** field provides for entering required general comments/justification information for the transaction.

Notes			
Report ID 0000[REDACTED]			
Date/Time	Name	Role	Notes
12/15/2021 2:53 PM	[REDACTED]	HR Supervisor	[REDACTED] e. Thank you.
12/15/2021 12:00 AM	[REDACTED]	[REDACTED]	[REDACTED] annual conference registration (remote)
08/10/2021 1:15 PM	[REDACTED]	HR Supervisor	Please resubmit expense report so it budget checks in the current fiscal year 2022. If you have any further questions, please contact Accounts Payable.
06/14/2021 1:05 PM	[REDACTED]	Prepay Auditor	06/14/2021: Sending back with an email [REDACTED]

Expense Summary

Click on the Expense Detail link displays the expense summary.

Expense Report Summary		Approval Status	
Total (1 Item)	95.00 USD	Report ID 0000[REDACTED]	Approvals in Process
Due to Employee	95.00 USD	Submitted	[REDACTED] 06/03/2021 9:38:52AM
Additional Information		Approved	[REDACTED] 06/07/2021 12:35:41PM
View Analytics	>	Approved	[REDACTED] 06/08/2021 11:50:43AM
Notes	4 >	Sent Back For Revision	[REDACTED] 06/14/2021 1:05:16PM
View Printable Report	>	06/14/2021: Sending back with an email to [REDACTED]	

Note: A Travel Authorization is required for travel related expenses. To review the TA for a travel related expense report use the **View Expense Report** component page (Navigation: **Nav Bar > Navigator > Travel and Expense Center > Expenses > View**).

Approve Expense Report (NavBar/Classic)

Navigation: **Nav Bar > Navigator > Travel and Expenses > Approve Transactions > Approve Transactions**

OR

Navigation: **Nav Bar > Navigator > Manager Self-Service > Travel & Expense Center > Approvals > Approve Transactions**

After using the above navigation, select the **Expense Report** tab and click the **Transaction ID** link to select a pending expense report.

Total Amount	Curr	Budget Status	Name	Employee ID	Description	GL Business Unit	Transaction ID	Date Submitted	Status	Role
623.06	USD	Budget Check	[Redacted]	[Redacted]	UFS Conference	HTR01	00000	11/22/2021	Submitted for Approval	Supervisor
131.89	USD	Budget Check	[Redacted]	[Redacted]	UFS Senate	HTR01	00000	11/22/2021	Approvals in Process	Supervisor

The expense report opens in **Expense Summary View** and most of the information can be reviewed on this page.

Note: All attachments associated to the expense report approval are not viewable from this component page. Use the Approvals tile to view attachments for the approval.

Approve Transactions

Approve Expense Report

User Defaults Expense Report Detail

General Information

Report Description	UFS Senate	Report ID	0000	GL Business Unit	HTR01
Business Purpose	Conference	Reference		Employee Base	
Report Status		Budget Date	11/22/2021	Created On	11/22/2021
Accounting Date	11/22/2021	Updated on		By	
Accounting Template				By	

Accounting Defaults More Options Choose an Action GO

You can deny individual expenses and still approve or send back the overall report.

Expense Line Items

Expense Type	Date	PC Business Unit	Project	Activity	Reimburse Amt	Currency	Approve	Description
PSC Taxi/Car Service	02/08/2020				124.89	USD	<input checked="" type="checkbox"/>	
PSC Per Diem Breakfast	02/08/2020				5.00	USD	<input type="checkbox"/>	
PSC Per Diem Breakfast	02/08/2020				1.00	USD	<input type="checkbox"/>	
PSC Per Diem Breakfast	02/10/2020				1.00	USD	<input type="checkbox"/>	

Expense Report Totals

Employee Expenses (4 Lines)	131.89 USD	Due Employee	0.00 USD
Non-Reimbursable Expenses	0.00 USD	Due Supplier	124.89 USD
Prepaid Expenses	7.00 USD	Definition of Totals	
Employee Credits	0.00 USD		
Supplier Credits	0.00 USD		
Cash Advances Applied	0.00 USD		

Pending Actions

Role	Name	Action	Date/Time
Supervisor			
Department Approver 2			
Prepay Auditor	(Pooled)		

Action History

Role	Name	Action	Date/Time
Employee		Submitted	11/22/2021 2:08:08PM

Comments

Expense Detail Lines

Expense Lines

Approval Workflow

Expense Detail

Use the **Expense Detail View** to review accounting lines. Complete the approval by following the current CUNYfirst process.

Return to Expense Report View

*Date	*Expense Type	*Description	*Payment Type	*Amount	*Currency
02/08/2020	PSC Taxi/Car Service	Taxi	TCard	124.89	USD
02/08/2020	PSC Per Diem Breakfast	Breakfast	Non-reimbursable	5.00	USD

Accounting Details

Amount	GL Unit	Monetary Amount	Currency Code	Exchange Rate	Account	Oper Unit	Fund	Dept	Program	MP
5.00	HTR01		USD	1.00000000		9999				

Approval

Commitment Control Details

Source Transaction Type: Expense Sheet
 Budget Checking Header Status: Not Budget Checked
 Commitment Control Amount Type: Encumbrance
 Commitment Control Tran ID: [redacted]
 Commitment Control Tran Date: 11/22/2021
 Override Transaction

Budget Check

Go To Transaction Exceptions | Go To Activity Log

Commitment Control

Commitment Control Details

Source Transaction Type: Expense Sheet
 Budget Checking Header Status: **Valid**
 Commitment Control Amount Type: Encumbrance
 Commitment Control Tran ID: 000661
 Commitment Control Tran Date: 11/22/2021
 Override Transaction

Budget Check

Go To Transaction Exceptions | Go To Activity Log

OK | **Cancel**

After reviewing the information and you are ready to approve the transaction, click the **Budget Options** button to access the **Commitment Control Details** window. Click the **Budget Check** button to run the budget.

Upon successfully running the budget (i.e., **Valid** status), click the **OK** button to return to the **Approve Expense Report** window and click the **Approve** button to continue the submission process.

Budget Status Valid

Budget Checking is required before the Expense Report can be Approved. Please click on the Budget Options hyperlink.

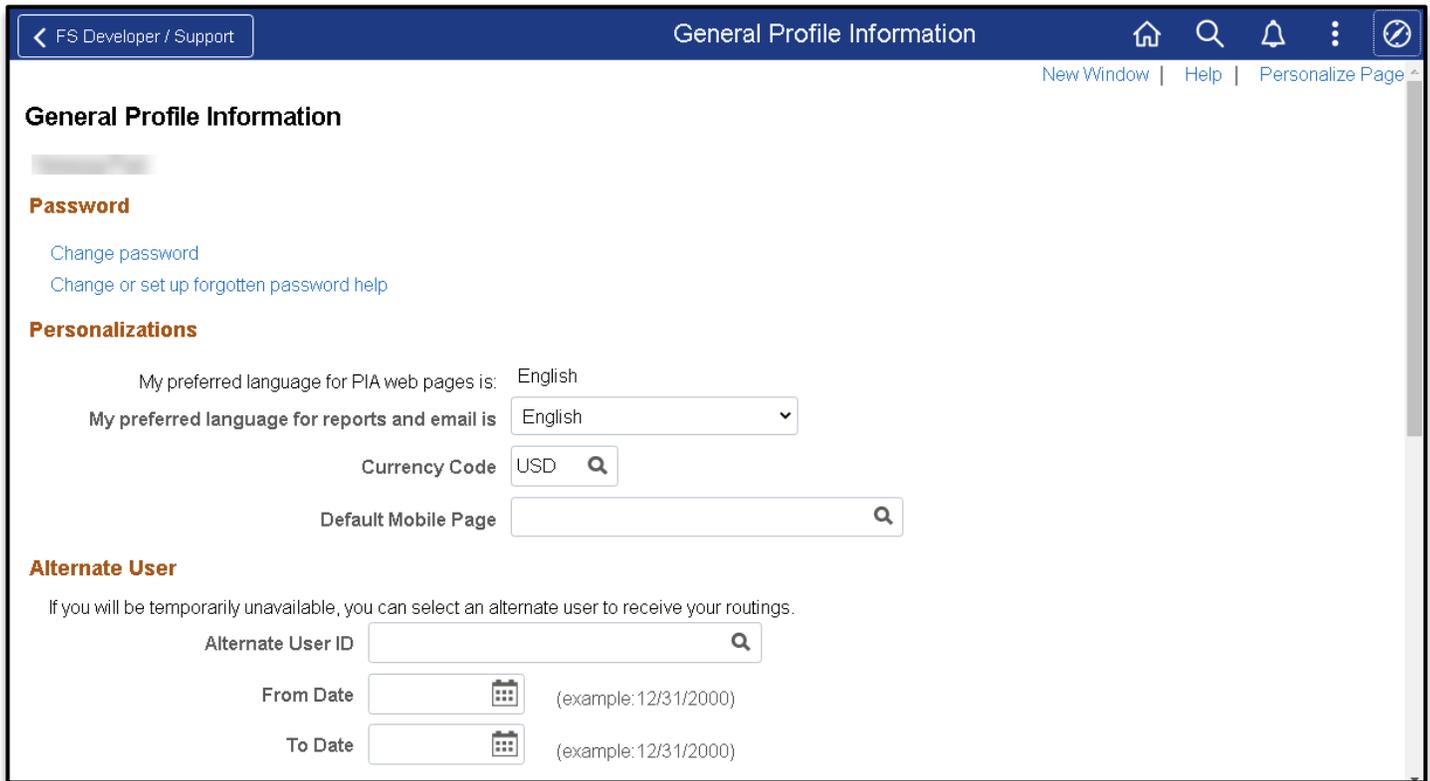
Budget Options

Approve | Send Back | Save Changes

Alternate User Set-up

Navigation: **NavBar > Navigator > My Special Profile**

Assigning an alternate user is the act of giving someone authority or responsibility for oneself. An alternate user/proxy is someone to represent your transactions/processes and/or approvals during an absence (e.g., vacation or medical leave). This process should be used when approvers are out of the office and unable to complete approvals.



The screenshot shows a web browser window with the following content:

- Header:** "General Profile Information" with navigation links for "New Window", "Help", and "Personalize Page".
- Section: General Profile Information**
 - Password:** Includes links for "Change password" and "Change or set up forgotten password help".
 - Personalizations:**
 - "My preferred language for PIA web pages is: English"
 - "My preferred language for reports and email is: English" (dropdown menu)
 - "Currency Code: USD" (input field with search icon)
 - "Default Mobile Page" (input field with search icon)
 - Alternate User:**
 - Text: "If you will be temporarily unavailable, you can select an alternate user to receive your routings."
 - "Alternate User ID" (input field with search icon)
 - "From Date" (calendar icon) with example "(example: 12/31/2000)"
 - "To Date" (calendar icon) with example "(example: 12/31/2000)"

Enter the alternate's/proxy's Empl ID in the Alternate User ID field. Enter the **From Date** (start date of alternate user's responsibilities). Enter the **To Date** (end date of alternate user's responsibilities) or leave blank for open ended assignment.

Click the **Save** button to save your changes.