TRAVEL ADVANCE CARD
QUICK GUIDE

Getting Started

Accessing Citibank for the First Time

Go to www.globalmanagement.citidirect.com
Enter the preset User ID and password - found in TAC envelope.

You will be prompted to set up three challenge questions and confirm your responses.

Remember your answers to these questions because you will be asked to answer one each time you log in.

Lastly, you will also be prompted to set up a security question and provide an answer.

Click **Submit** when finished.

Viewing Transactions

Log in to Citibank:

Go to www.globalmanagement.citidirect.com

When prompted, enter your user ID and password.

When prompted, respond to your question.

Where to go once you have logged in:

Click on the **Account Activity** tab

Click on **Transaction Summary**

Select the Date Range:
Be sure the "To "date is at least 6 days after the travel end date.

Click on **Search.**

Click **Expand All**

Edit Information

Click on **Edit Accounting Codes.** Note: Not all transactions may be allowed for edits, if the previous billing cycle has closed.

Select the **Acct#,** edit **Cost Center,** and **Expense Description/Business Justification** for each expense listed.

Then click on the *Save* icon:

Explanation of Icons

There are several time saving icons available:

Click on this icon to view the transaction details. Transaction reference number is here. You can use this to dispute transactions when necessary.

Click on this icon to add splits for additional cost centers / accounts. Then enter the number of splits you want to add in the **Splits** box and click **Add.** Additional lines will appear. Select "percent" or "amount" from the drop down menu (depending on whether you want to split % or $). You will enter descriptions for each line and then "save".

Click on this button to button to update cost center information.

Click on this icon to expand only one transaction. Click on the **Edit Accounting Codes** button and select the **Acct#, Cost Center,** and add **Expense Description.** *This is the same as Expand All, but for one transaction at a time.*