INTRODUCTION
The eTravel Reimbursement module has been designed to enhance sustainability by moving paper processes and approvals online, reduce time for reimbursement and provide notifications & online status of travel authorizations and expense claims. The eTravel service will also allow users to scan and upload receipts from their mobile devices.

This guide is designed to provide information to successfully use the eTravel Reimbursement module, including the following topics:

- Accessing the Campus Web Portal
- Adding or Deleting a Delegate
- Creating a Travel Authorization
- Modifying a Travel Authorization
- Checking the Status of a Travel Authorization
- Cancelling or Deleting a Travel Authorization
- Creating a new Travel Authorization from an existing Travel Authorization

All employees with an active job record in Human Resources will have access as a Traveler. No application is required to request access.

WHO DO I CONTACT FOR HELP?
Create a Service Request to Solar Financials or email solarfin@csun.edu. For immediate assistance contact SOLAR Financials by phone (818) 677-1000, option #2 – option #1.
CREATING A TRAVEL AUTHORIZATION

1. From the Travel and Expense Center, select the Create link under Travel Authorizations section.

2. If you are a delegate, choose the appropriate employee under Select Employee. A blank authorization page will display.

3. If you are the traveler, a blank authorization will display.

4. Begin with the General Information section and enter a short Description of your planned travel.

5. In the Business Purpose dropdown menu, select the best option for your planned travel.
6. Do not use the Default Location. This option is currently not supported.

7. Enter the Date From and Date To information that is inclusive of your trip. The date must be equal to or after the current date.

8. Attachments can be added at the header under General Information by selecting the Attachments link or by line item by selecting the paperclip icon in the appropriate line.
   
   Click here for detailed instructions to add attachments.

9. Do not use the More Options dropdown links. These options are currently not supported.
10. Select the **Expense Type** from the dropdown menu. Review the details before using **Non-Reimbursement Amt**.

11. Once the **Expense Type** is selected, enter the **Date** and the **Amount** of the expense.

12. Select **CSUN Paid, Intercampus Transfer (CPO)**, or **Traveler Paid** from the **Payment Type** dropdown menu.

**Do not** select **CSUN Paid** if the payment was made by the traveler. This option should be used only when the payment needs to be made by the University directly to the Vendor.

When choosing the **CSUN Paid** option, the name of the vendor to be paid must be entered in the **Comment** field, attach the invoice to the travel authorization.
13. From the **Billing Type** dropdown, select **In State** or **Out of State**. If the travel **destination** is **In State** or **Out of State**, the billing type **must** be the same for all line expenses.

14. *Detail links with an asterisk require additional information. The details required vary by **Expense Type**.*

15. Additional rows can be added by selecting the + sign at the end of each expense row. Enter the **number of rows** to add, followed by the **OK** button.

Once rows are added and an expense type is selected, it will **default** to **In State**. If travelling **Out of State**, make sure the **Billing Type** is **Out of State** for all expenses.

16. There are **two** ways to copy an expense line:

1. Selecting the appropriate expense to copy, followed the Copy Selected button.
2. Selecting Multiple Expenses from the drop down menu, followed by the Add button.
3. Selecting New Expense adds a blank expense line.

Go the **Copy Function page** for detailed instructions.
17. Once the travel authorization is completed, select the **Check for Errors** button. A **red flag** will display next to the Expense Type missing required information or that have invalid data will be **highlighted in red**. Select the **Red Flag** icon next to the Expense Type to view and edit the errors.

18. The **Totals** section displays the **Authorized Amount** for the travel authorization.

19. To save the travel authorization for later, select the **Save for Later** button.

20. To submit the travel authorization, select the **Submit** button. A **Save Confirmation** message will display, select the **OK** button.

21. The **status** will change to **Submission in Process**. Make a note of the **Travel Authorization ID number** for your records.
22. Once the Travel Authorization has been approved at all levels, an email notification will be sent.

```
From: solarfin@csun.edu
Sent: Thursday, April 24, 2014 2:39 PM
To: Doe, John
Subject: Travel authorization request for 110.00 USD has been approved.

The following travel authorization request has been approved:

Employee ID: 000123456
Employee Name: Doe, John
Submission Date: 2014-04-24
Travel Auth Description: Orlando, FL Conference
Travel Auth ID: 8000000114
Business Purpose: Conference
Total Amount: 1100.00 USD
Reimbursement Amount: 1100.00 USD
```

CREATING A NEW TRAVEL AUTHORIZATION FROM AN EXISTING TRAVEL AUTHORIZATION

1. To quickly generate a new travel authorization from an existing travel authorization, select the Quick Start dropdown menu and choose An Existing Authorization, followed by the Go button.

Information from an existing authorization will populate, allowing edits from the existing information.