

eTRAVEL REIMBURSEMENT APPROVER

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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](#)
- [Assigning a Temporary Backup Approver](#)
- [Approving a Travel Authorization](#)
- [Approving a Cash Advance](#)
- [Approving an Expense Report](#)
- [Adding Attachments](#)

APPROVERS:

Initial Approvers can be any employee designated by the Department or College. An access request form is required.

- ☑ **Department Chair or Management Approver** access will automatically default from HR to the first MPP or Department Chair in the reporting line. A security application is not required.
- ☑ **Financial Approver** requires an [Authorized Signature form](#) on file. A security application is required.
- ☑ **Hotel Approver** for hotel expenses greater than \$☑ a night, excluding taxes and fees, is restricted to the V.P. Offices. A security application is required.
- ☑ **International Approver** is restricted to the V.P. Offices. A security application is required.

APPROVERS RESPONSIBILITY:

It is the responsibility of the approver to ensure that:

- All appropriate documentation is attached
- Justification is provided for Hotels over \$333, excluding taxes and fees.
- Expense, Billing, and Payment Types are appropriate for the expenditure
- All expenditures are in accordance with CSU and CSUN policy.

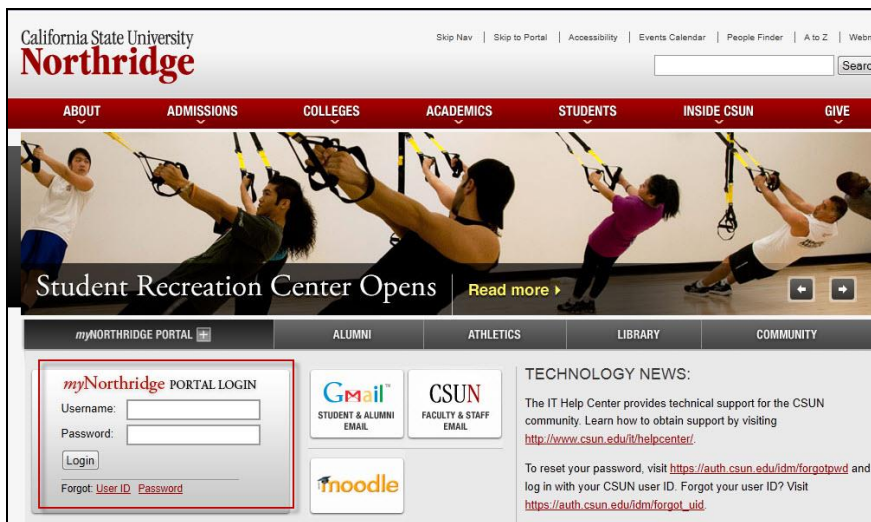
WHO DO I CONTACT FOR HELP?

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.

ACCESSING THE CAMPUS WEB PORTAL

SOLAR applications are housed within the Campus web portal. Follow the instructions below to access the Campus web portal:

1. From an **Internet Browser**, access the **myNorthridge portal login** located on the [CSUN](#) home page.
2. Log in using your CSUN **User ID** and **Password**.
3. Select the **Login** button.



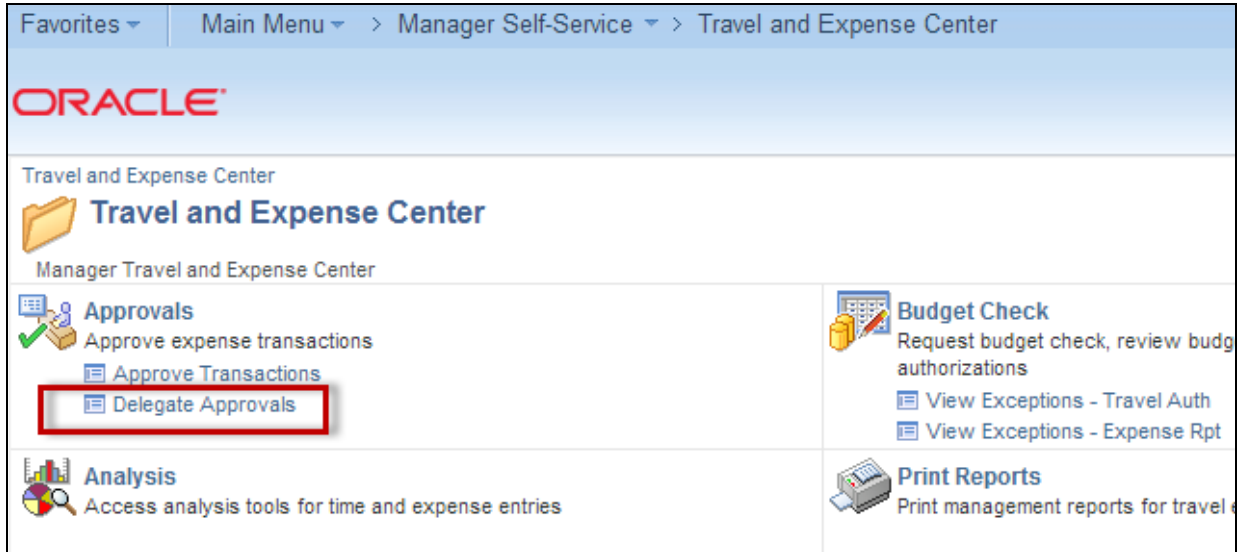
4. From the **Staff** tab, select the **Manager eTravel Center** link in the **CSUN Travel** pagelet.



ASSIGNING A TEMPORARY BACKUP APPROVER

Temporary Backup Approvers can be requested for the Departments/Colleges to approve requests on behalf of the primary approvers by submitting an [eTravel Approver Request Form](#). The Primary Approver will have the ability to delegate approvals to qualifying backups.

1. From the Manager Travel and Expense Center select **Delegate Approvals**.



2. Select the magnifying glass to choose the appropriate **Delegate User ID**.

The screenshot shows the 'Authorized User' form. The title is 'Authorized User'. Below the title is the instruction: 'Enter or select an approver to temporarily approve travel transactions on your behalf.' There are three input fields: '* Delegate User ID' (with a magnifying glass icon highlighted by a red box), '* Effective Begin Date', and '* Effective End Date'. There are also two buttons: 'Save' and 'Remove Alternate Approver'.

3. The delegate selected must be at the same or higher Approver level as the Primary Approver.

The screenshot shows the 'Look Up * Delegate User ID' dialog box. The title is 'Look Up * Delegate User ID'. There is a 'Search by:' dropdown menu set to 'Alternate User ID' and a 'begins with' text box. There are three buttons: 'Look Up', 'Cancel', and 'Advanced Lookup'. Below the buttons is a 'Search Results' section. It shows 'View 100' and 'First' and 'Last' navigation buttons. The search results are displayed in a table:

Alternate User ID	Name
E0010299	Xanthos, Janice M
E0013256	Lumowa, Paula L

4. Input the temporary **begin and end date**.

Authorized User

Enter or select an approver to temporarily approve travel transactions on your behalf.

* Delegate User ID Name Xanthos,Janice M

* Effective Begin Date

* Effective End Date

5. Select **Save**.

NAVIGATION FOR APPROVING TRAVEL

1. From the Manager Travel and Expense Center select **Approve Transactions**.

Favorites ▾ Main Menu ▾ > Manager Self-Service ▾ > Travel and Expense Center

ORACLE

Travel and Expense Center

Travel and Expense Center

Manager Travel and Expense Center

Approvals
Approve expense transactions

Budget Check
Request budget check authorizations

Analysis
Access analysis tools for time and expense entries

Print Reports
Print management reports

2. Select the appropriate guide to approve:

- [Approving a Travel Authorization](#)
- [Approving a Cash Advance](#)
- [Approving an Expense Report](#)