eTRAVEL REIMBURSEMENT
TRAVEL AUTHORIZATION GUIDE

University Hall 365
Phone: (818) 677-2945
Fax: (818) 677-4581

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:

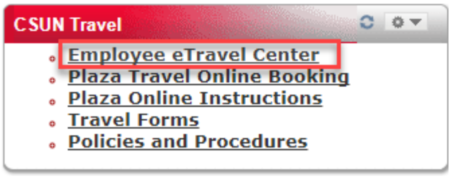
All employees with an active job record in Human Resources will have access as a **Traveler**. No application is required to request access.

WHO DO I CONTACT FOR HELP?

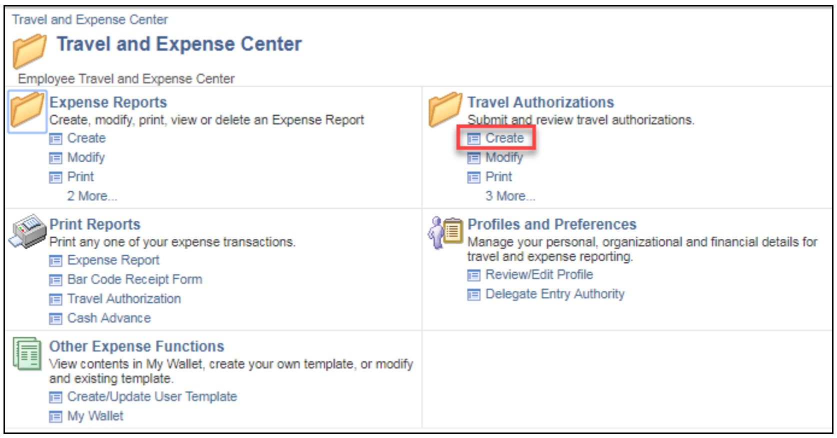
Create a Service Request to Solar Financials or email solarfin@csun.edu. For immediate assistance contact SOLAR Financials by phone (818) 677-6685.

CREATING A TRAVEL AUTHORIZATION

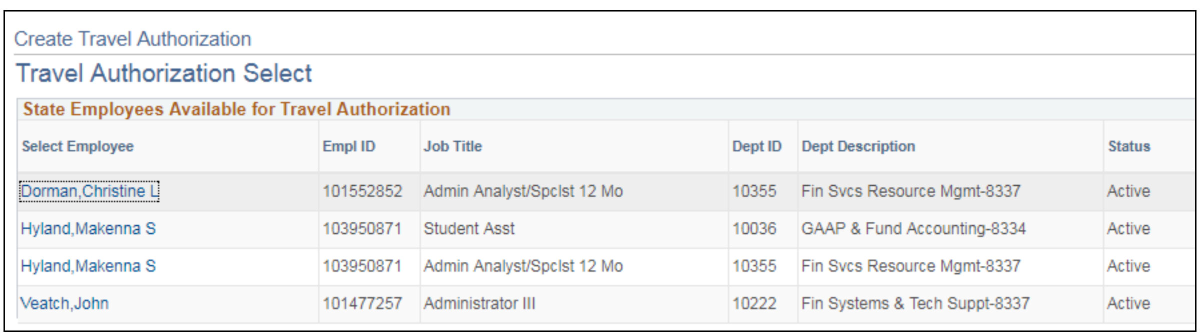
1. From the **CSUN Travel pagelet**, select the **Employee eTravel Center** link.



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



3. If you are the **Traveler with no other job records**, a blank travel authorization will display.
   - **Travelers with multiple job records** must choose the correct job record for the trip.
   - **Delegates** must choose the correct Traveler for the trip.



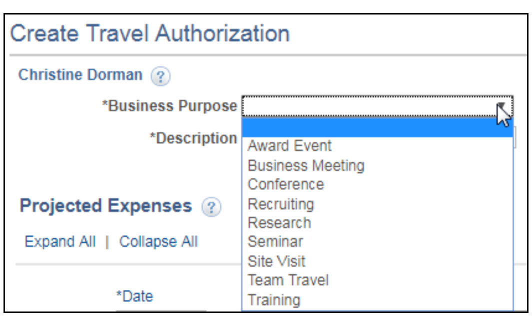
Create Travel Authorization

Travel Authorization Select

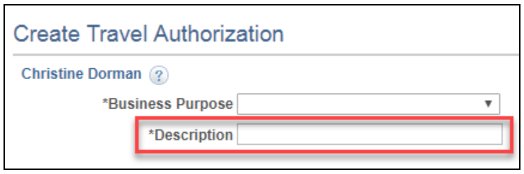
State Employees Available for Travel Authorization

Select Employee	Empl ID	Job Title	Dept ID	Dept Description	Status
Dorman,Christine L	101552852	Admin Analyst/Spclst 12 Mo	10355	Fin Svcs Resource Mgmt-8337	Active
Hyland,Makenna S	103950871	Student Asst	10036	GAAP & Fund Accounting-8334	Active
Hyland,Makenna S	103950871	Admin Analyst/Spclst 12 Mo	10355	Fin Svcs Resource Mgmt-8337	Active
Veatch,John	101477257	Administrator III	10222	Fin Systems & Tech Suppt-8337	Active

4. Begin with the **Business Purpose** dropdown menu. Select the <u>best option</u> for your planned travel.

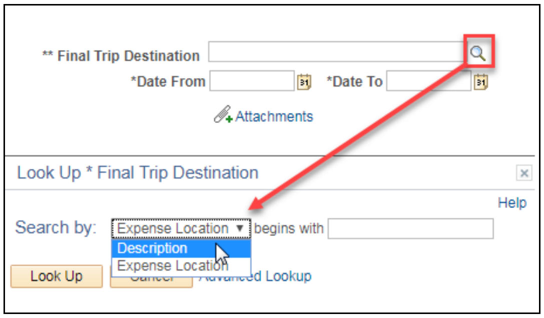


5. Enter a short **Description** of the trip in the **Description** field.



6. To choose your **Final Trip Destination,** select the **magnifying glass** icon. Change the **Search by** dropdown menu to **Description** and enter the **City and State (Domestic) or Country (International)** followed by the **Look Up** button.

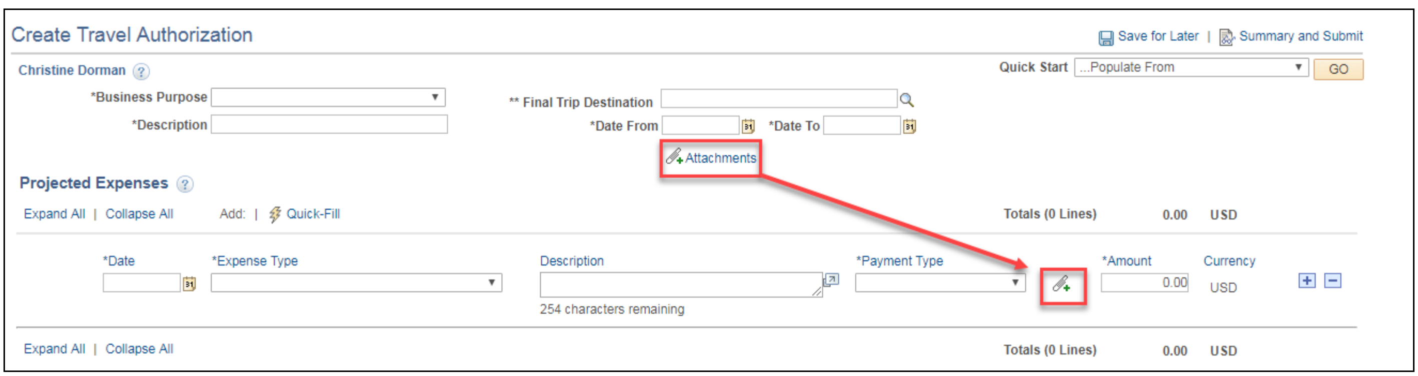
   - Select the appropriate destination.



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

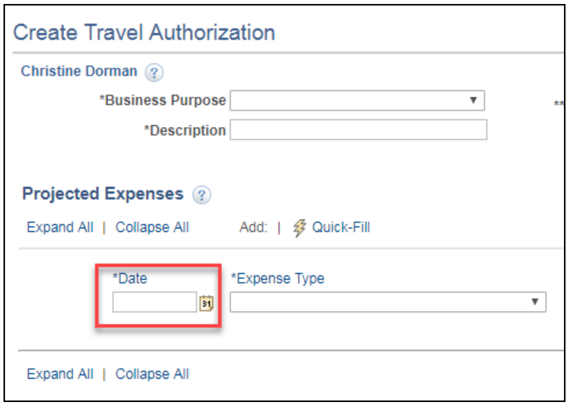
8. **Attachments** can be added at the header or by line item by selecting the paperclip icon for required documents, such as a paid registration or receipts.

   - The Travel Desk would like the receipts to be attached by line item.

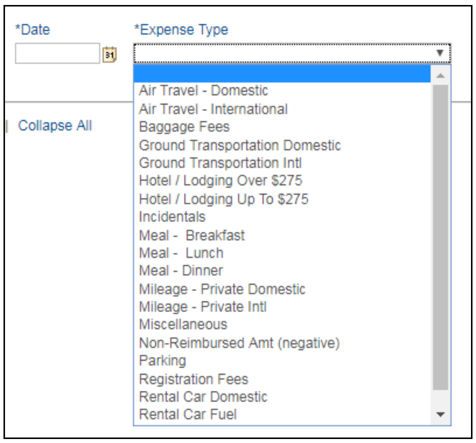


Click here for detailed instructions to add attachments.

9. Under the **Projected Expenses** section, enter the **Date** of the expense.



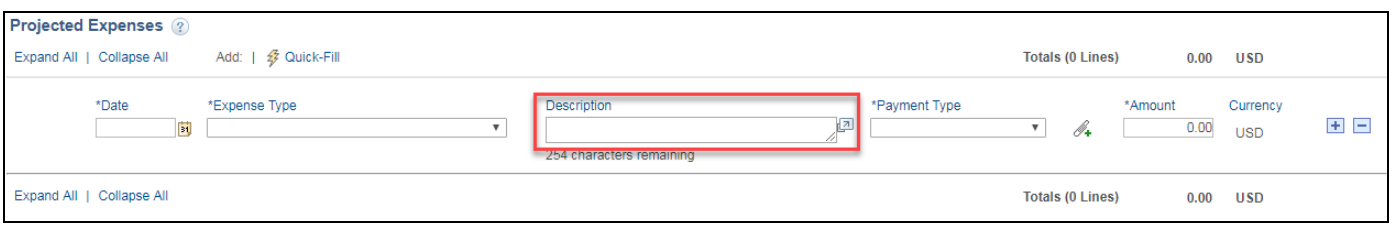
10. Select the **Expense Type** from the dropdown menu.



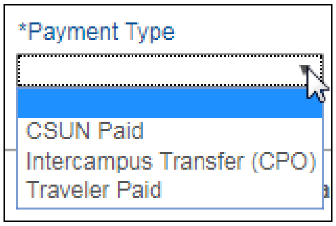
- Please review the [Non-Reimbursed Amt details](), this Expense Type is selected.

11. Enter a **Description** of the expense.

- <u>Hotel/Lodging Over $275 will require a justification</u>. Provide the justification in the description box in addition to the description of the expense.

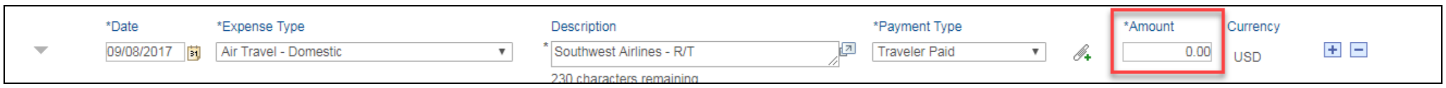


12. After completing the **Description** field, select the **Payment Type** from the dropdown menu.

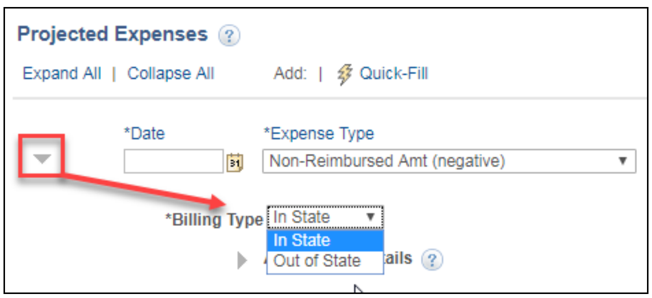


- <u>Do not</u> select **CSUN Paid** if the payment was <u>paid by the traveler</u>. This option should be used <u>only</u> when University pays the Vendor directly.
- When choosing the **CSUN Paid** option, the Vendor information and invoice <u>must</u> be attached to the travel authorization so the Travel Desk can pay the Vendor.

13. Enter the **estimated amount** of the expense. A zero dollar expense can never be entered.



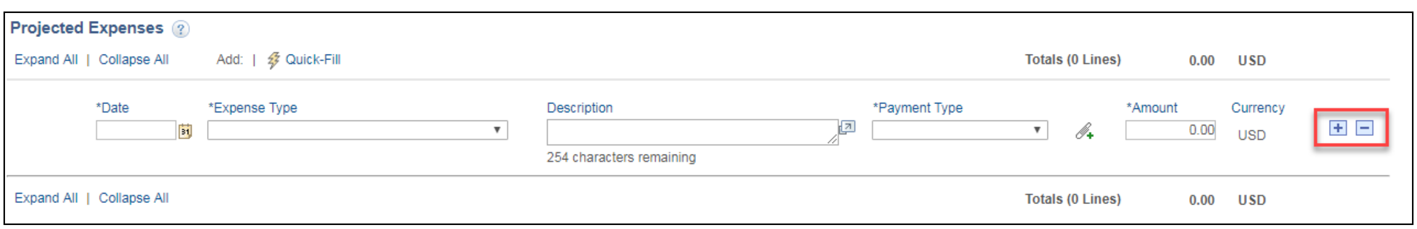
14. Select the **Expand** icon to open the details of the expense. Choose the **Billing Type** from the dropdown menu.



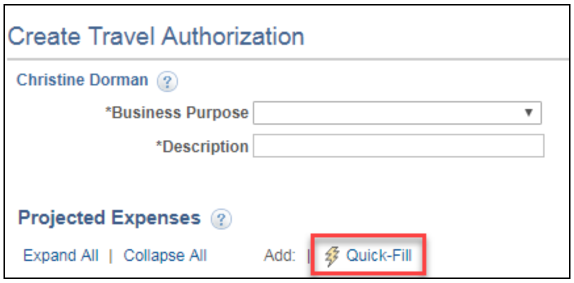
- If the <u>travel destination</u> is **In State**, all line expenses must have a Billing Type of **In State**.
- If the <u>travel destination</u> is **Out of State**, all line expenses must have a Billing Type of **Out of State**.

15. To **add or delete rows** for an expense, select the **+ or – sign** next to an expense line.

- Newly added rows will <u>default</u> to a **Billing Type** of **In State**.

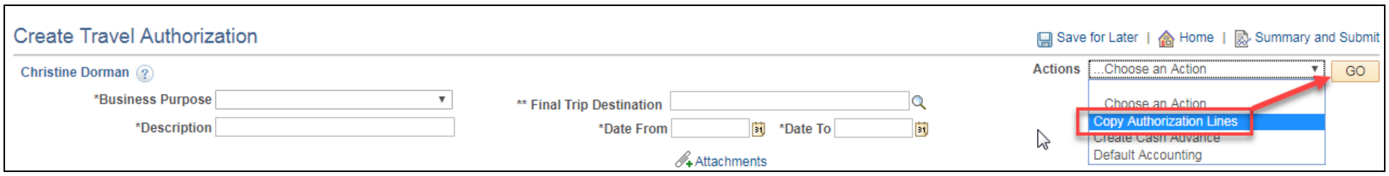


16. The **Quick-Fill** link allows the traveler to quickly add multiple expense types for all travel days

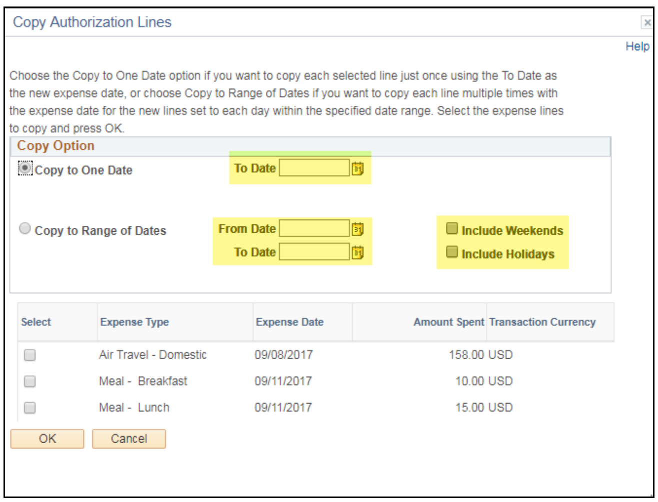


17. To copy full expense lines:

- Go to the **Actions** drop down menu, select **Copy Authorization Lines**, followed by the **GO** button.



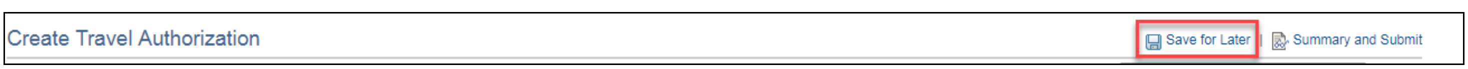
- Copy expenses for <u>one date</u> or a <u>range of dates</u> as indicated below:



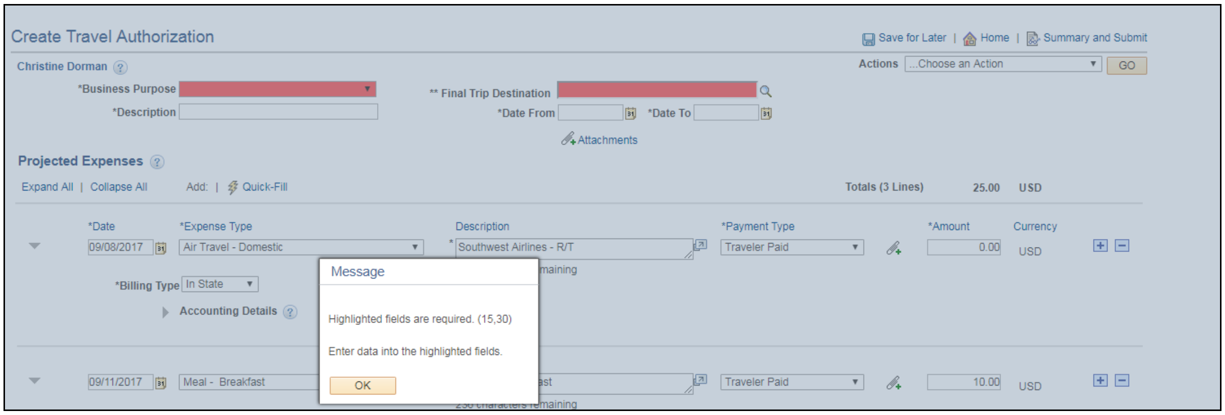
- After entering the dates, select the Expense Type(s) you would like to copy for the dates entered, followed by the **OK** button.

18. Once the Travel Authorization is completed, select the **Save for Later** button to check for errors.

- If no errors, the status will change to **Pending** and an **Authorization ID** will be generated.



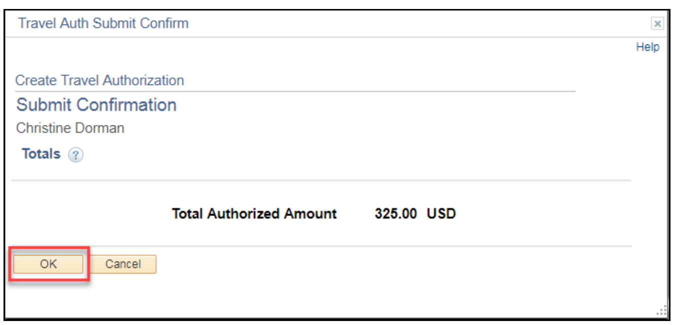
19. If there are errors, a **pop-up message** will display. Select the **OK** button. The errors will be highlighted in red.



20. To submit the request for approval, select **Summary and Submit** link.

21. The traveler or delegate must **check the box** to certify that the costs are reasonable estimates and comply with expense policy, followed by the **Submit Travel Authorization** button.

22. A **Submit Confirmation** message will display, select the **OK** button.



23. The status will change from **Pending** to **Submission in Process**. Make a note of the Travel Authorization number for your records.