

eTRAVEL REIMBURSEMENT TRAVEL AUTHORIZATION GUIDE

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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:

- [Access the Campus Web Portal](#)
- [Add or Delete a Delegate](#)
- [Create a Travel Authorization](#)
- [Modify a Travel Authorization](#)
- [Check the Status of a Travel Authorization](#)
- [Send Backs](#)
- [Withdraw a Travel Authorization](#)
- [Cancel or Delete a Travel Authorization](#)
- [Troubleshooting Queries](#)

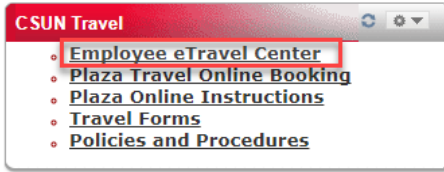
All employees with an active job record in Human Resources will have access as a **Traveler**. No application is required to request access.

WHO DO I CONTACT FOR HELP?

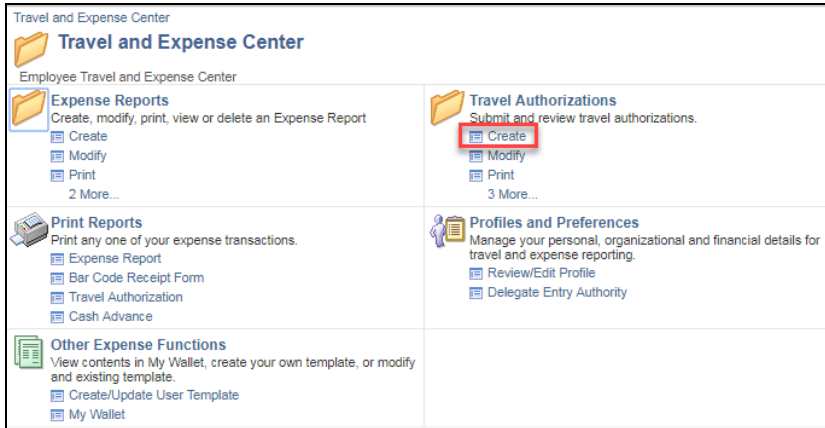
Create a [Service Request](#) to Solar Financials or email solarfin@csun.edu. For immediate assistance contact SOLAR Financials by phone (818) 677-6685.

CREATING A TRAVEL AUTHORIZATION

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



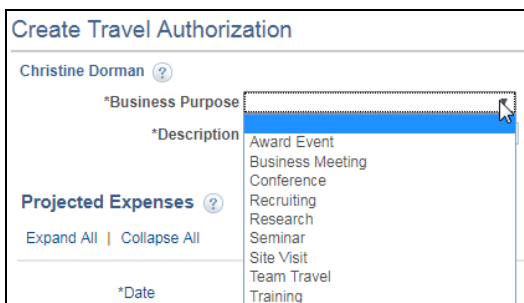
2. From the **Travel and Expense Center**, select the **Create** link under the **Travel Authorizations** section.



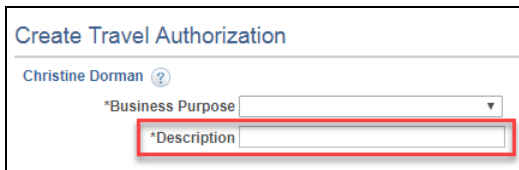
3. If you are the **Traveler with no other job records**, a blank travel authorization will display.
 - **Travelers with multiple job records** must choose the correct job record for the trip.
 - **Delegates** must choose the correct Traveler for the trip.

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 best option for your planned travel.



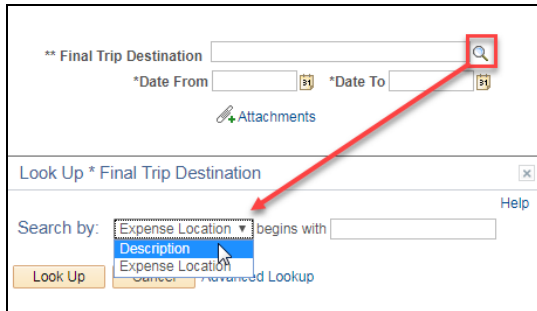
5. Enter a short **Description** of the trip in the **Description** field.



The screenshot shows the 'Create Travel Authorization' form for user Christine Dorman. The '*Business Purpose' dropdown menu is open, and the '*Description' text input field is highlighted with a red rectangular box.

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.



The screenshot shows the 'Final Trip Destination' search interface. A red arrow points from the magnifying glass icon in the search field to the 'Description' option in the 'Search by' dropdown menu. The dropdown menu also shows 'Expense Location' and 'Expense Location' as other search options.

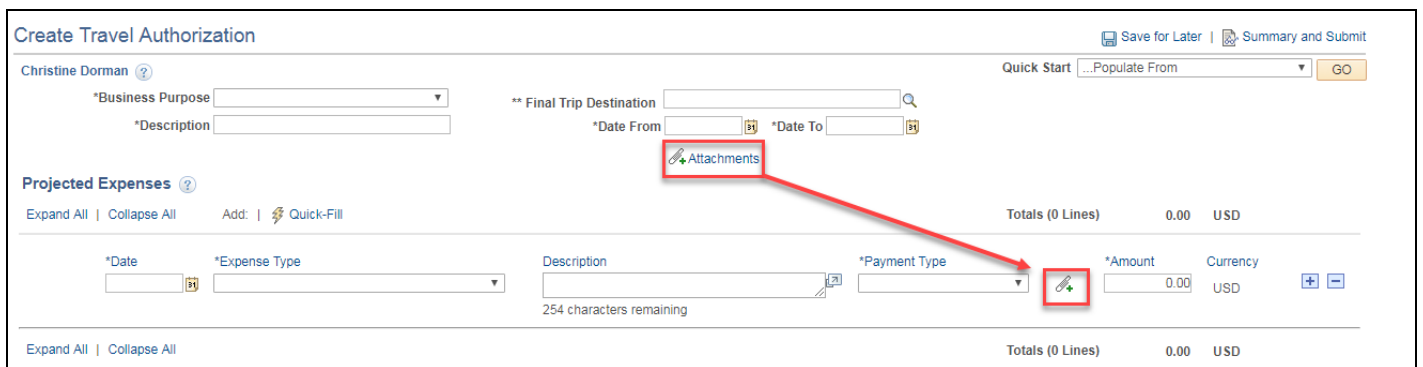
7. Enter the **Date From** and **Date To** information of the trip. The date must be equal to or after the current date.



The screenshot shows two date input fields: '*Date From' and '*Date To'. Each field has a calendar icon to its right.

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.



The screenshot shows the 'Create Travel Authorization' form with the 'Attachments' icon highlighted by a red box. The form includes fields for '*Business Purpose', '*Description', '** Final Trip Destination', '*Date From', and '*Date To'. Below these fields is the 'Projected Expenses' section, which contains a table with columns for '*Date', '*Expense Type', 'Description', '*Payment Type', '*Amount', and 'Currency'. The 'Attachments' icon is located in the bottom right corner of the table.

[Click here for detailed instructions to add attachments.](#)

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

Create Travel Authorization

Christine Dorman

*Business Purpose

*Description

Projected Expenses

Expand All | Collapse All Add: | Quick-Fill

*Date

*Expense Type

Expand All | Collapse All

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

*Date

*Expense Type

Collapse All

- Air Travel - Domestic
- Air Travel - International
- Baggage Fees
- Ground Transportation Domestic
- Ground Transportation Intl
- Hotel / Lodging Over \$275
- Hotel / Lodging Up To \$275
- Incidentals
- Meal - Breakfast
- Meal - Lunch
- Meal - Dinner
- Mileage - Private Domestic
- Mileage - Private Intl
- Miscellaneous
- Non-Reimbursed Amt (negative)
- Parking
- Registration Fees
- Rental Car Domestic
- Rental Car Fuel

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

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

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

Projected Expenses

Expand All | Collapse All Add: | Quick-Fill

Totals (0 Lines) 0.00 USD

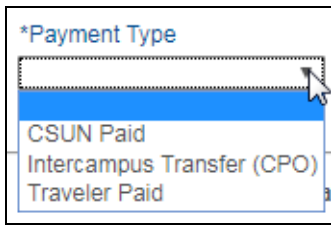
*Date	*Expense Type	Description	*Payment Type	*Amount	Currency
		<input type="text" value=""/>		0.00	USD

254 characters remaining

Expand All | Collapse All

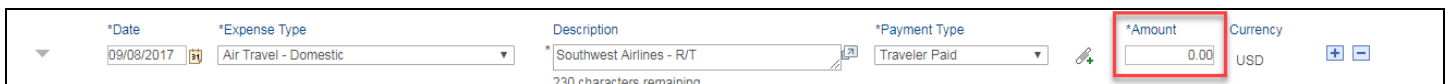
Totals (0 Lines) 0.00 USD

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

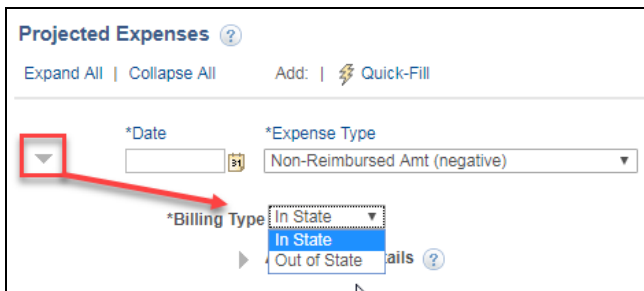


- **Do not** select **CSUN Paid** if the payment was paid by the traveler. This option should be used only when University pays the Vendor directly.
- When choosing the **CSUN Paid** option, the Vendor information and invoice must be attached to the travel authorization so the Travel Desk can pay the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

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



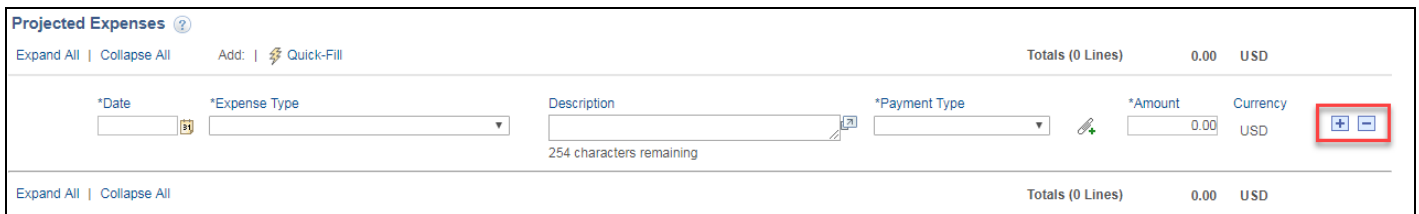
14. Select the **Expand** icon to open the details of the expense. Choose the **Billing Type** from the dropdown menu.



- If the travel destination is **In State**, all line expenses must have a Billing Type of **In State**.
- If the travel destination 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 default 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

The screenshot shows the 'Create Travel Authorization' form for Christine Dorman. It includes fields for '*Business Purpose' and '*Description'. Below these is the 'Projected Expenses' section with 'Expand All | Collapse All' and an 'Add:' button. The 'Quick-Fill' button is highlighted with a red box.

17. To copy full expense lines:

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

The screenshot shows the 'Create Travel Authorization' form with the 'Actions' dropdown menu open. The 'Copy Authorization Lines' option is selected and highlighted with a red box. The 'GO' button is also highlighted with a red box. Other fields include '*Business Purpose', '*Description', '** Final Trip Destination', '*Date From', and '*Date To'.

- Copy expenses for one date or a range of dates as indicated below:

The screenshot shows the 'Copy Authorization Lines' dialog box. It includes instructions on how to use the 'Copy to One Date' or 'Copy to Range of Dates' options. The 'Copy to One Date' option is selected. Below this is a table of expense lines with columns for 'Select', 'Expense Type', 'Expense Date', 'Amount Spent', and 'Transaction Currency'. The 'OK' button is highlighted with a red box.

Select	Expense Type	Expense Date	Amount Spent	Transaction Currency
<input type="checkbox"/>	Air Travel - Domestic	09/09/2017	158.00	USD
<input type="checkbox"/>	Meal - Breakfast	09/11/2017	10.00	USD
<input type="checkbox"/>	Meal - Lunch	09/11/2017	15.00	USD

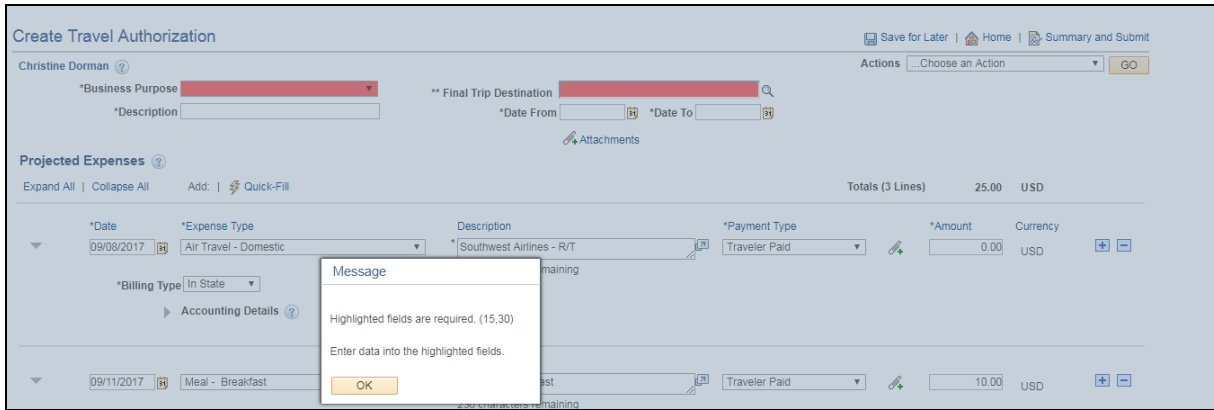
- After entering the dates, select the Expense Type(s) you would like to copy for the dates entered, followed by the **OK** button.

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.

The screenshot shows the 'Create Travel Authorization' form with the 'Save for Later' button highlighted with a red box. The 'Summary and Submit' button is also visible.

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



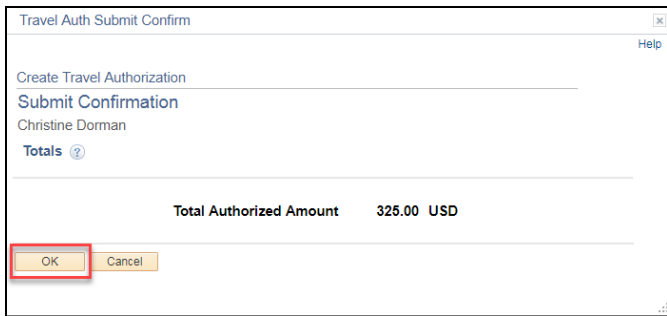
20. To submit the request for approval, select **Summary and Submit** link.



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.