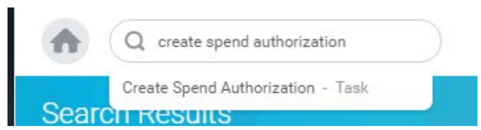
Completing a Spend Authorization

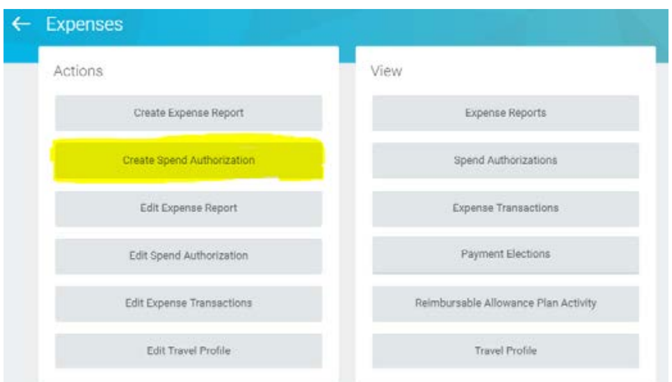
- ➢ **You need a spend authorization for all travel.**
- ➢ **A spend authorization is an estimate of the cost of your travel.**
- ➢ **No purchases, by the traveler or University can be incurred until the spend authorization has been fully approved.**

Steps:

1. Access "Expense" worklet (or) Search for "Create Spend Authorization"



2. Select "Create Spend Authorization"



3. Complete top summary section: (see sample on next page)
   a. Start Date (date you leave)
   b. End Date (date you return)
   c. Description (brief description of reason for travel)
   d. Business Purpose (where your travel destination is)
   e. Justification (details of reason for travel)

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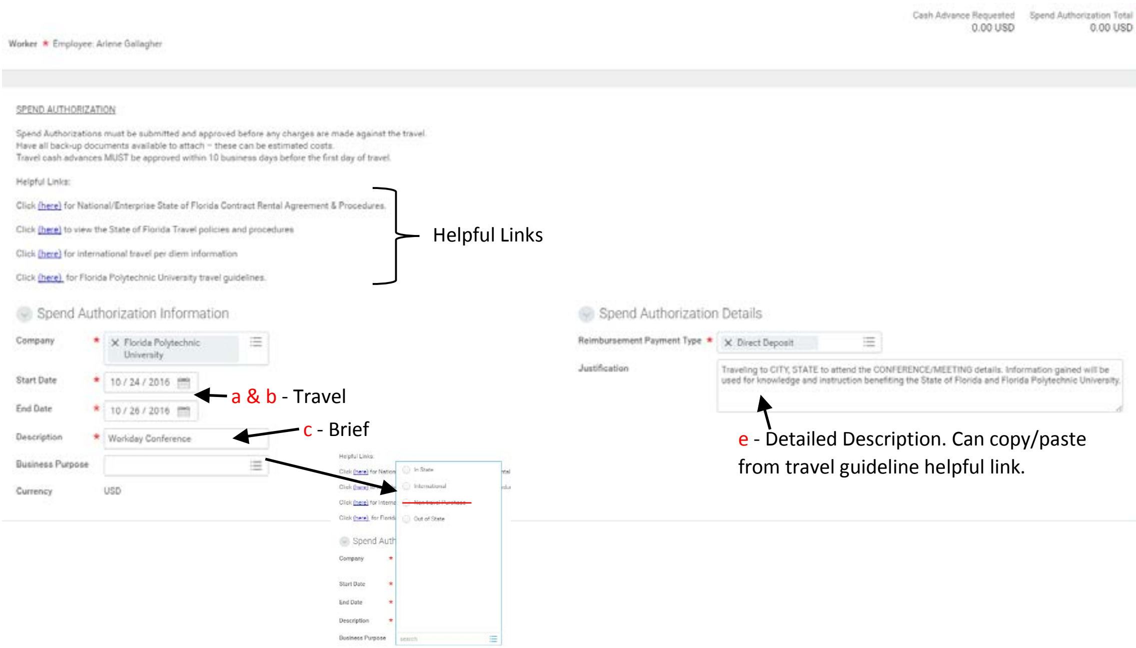
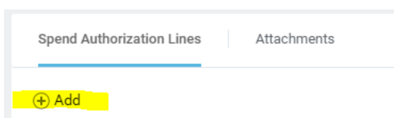
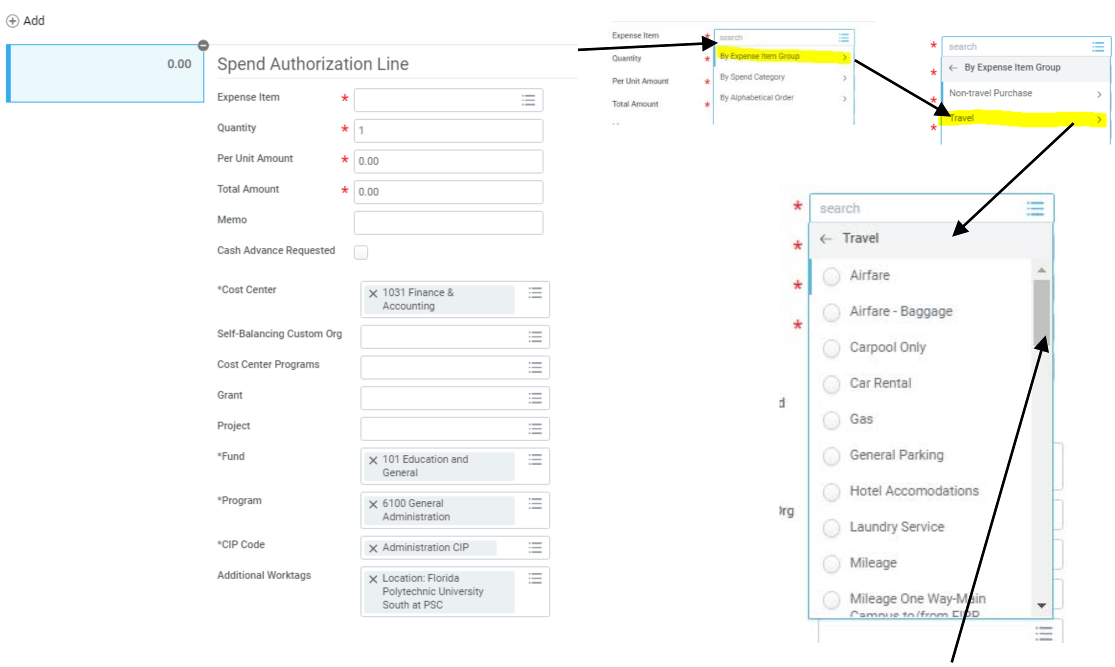


4. Input all anticipated travel expenses
    a. Select "add" under "Spend Authorization Lines" tab to add a new expense



    b. Select the appropriate expense item and complete all required fields (* indicates required fields)



Use scroll bar to access additional travel categories

5. Select "Add" for additional expense lines (see #4 above)

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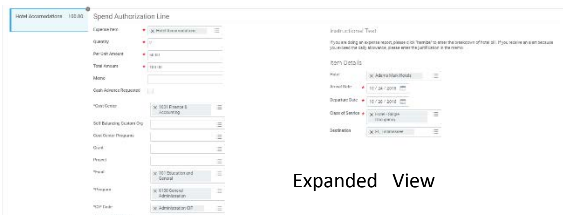
6. You can view the spend authorization lines in expanded or collapsed view.

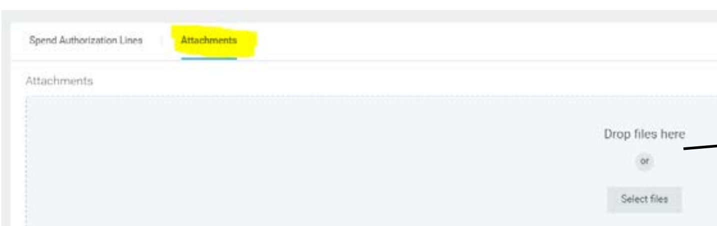
Expanded   Collapsed

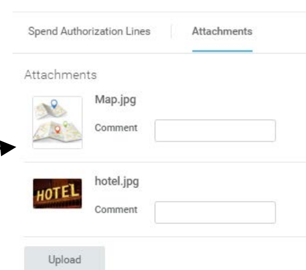


Expanded   View

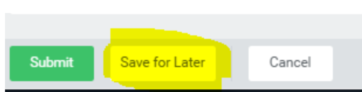
Collapsed View

7. Once you have input all your estimated travel expenses you will add all back-up documents for those expenses.
    a. Select on the “Attachments” Tab and insert attachments (you can have multiple attachments)

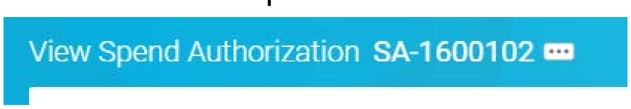




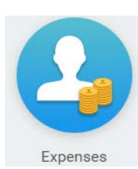
8. Review your expense lines and verify all required attachments are uploaded.
    a. If you need to gather additional information you can “Save for Later”

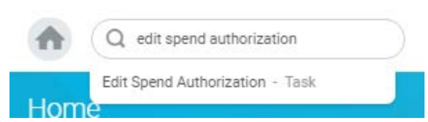


    b. You will receive a spend authorization #



    c. To go back and edit a spend authorization
        i. Access “Expense” worklet (or) Search for “Edit Spend Authorization”





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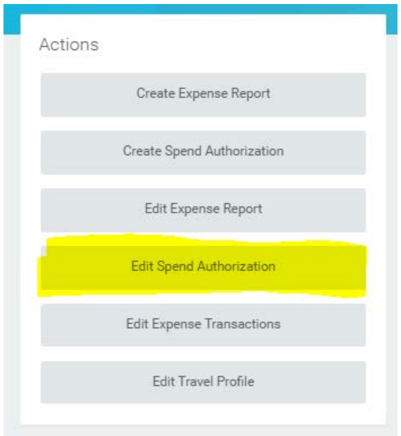
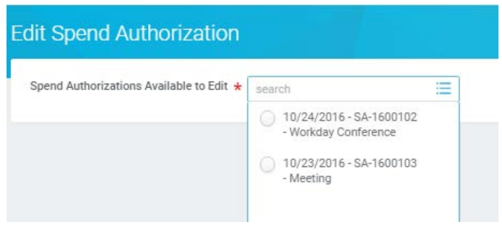
d. Select “Edit Spend Authorization”

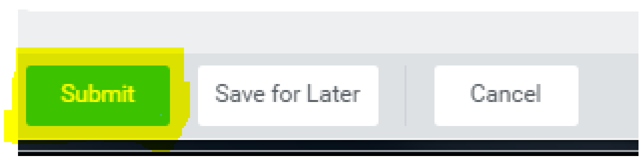


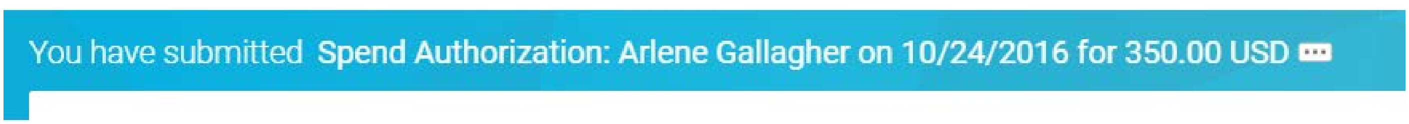
e. Choose the spend authorization you wish to revise.

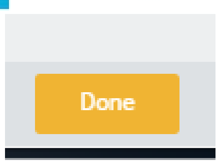


Once all additional travel expenses and backup documents have been included you can submit for approval.

9. If everything is in order, select “Submit” to begin the approval process.

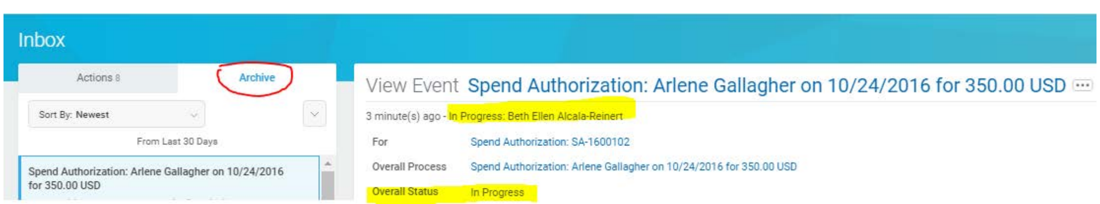






Select Done

10. The spend authorization will be in your inbox “archive” section.
    a. Here you can view where it is in the approval process.



    b. Once approved you can charge against this travel (i.e.: book airfare; pay registration fees)

11. Enjoy your travel.