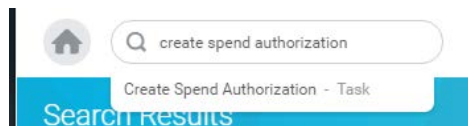
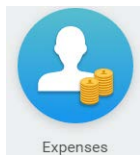


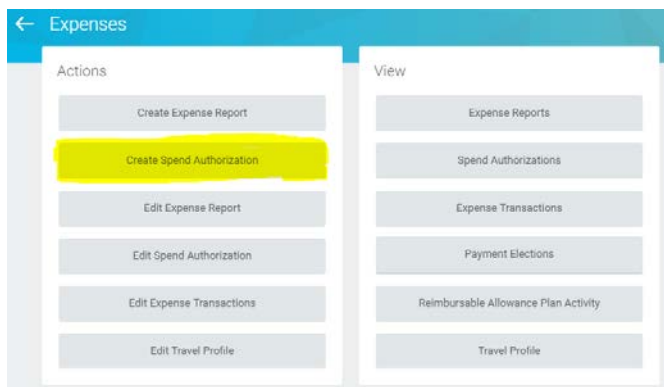
- **You need a spend authorization for all travel.**
- **A spend authorization is an estimate of the cost of your travel.**
- **No purchases, by the traveler or University can be incurred until the spend authorization has been fully approved.**

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)

Completing a Spend Authorization



Workers * Employee: Arlene Gallagher

Cash Advance Requested 0.00 USD Spend Authorization Total 0.00 USD

SPEND AUTHORIZATION

Spend Authorizations must be submitted and approved before any charges are made against the travel. Have all back-up documents available to attach - these can be estimated costs. Travel cash advances MUST be approved within 10 business days before the first day of travel.

Helpful Links:

- Click [here](#) for National/Enterprise State of Florida Contract Rental Agreement & Procedures.
- Click [here](#) to view the State of Florida Travel policies and procedures.
- Click [here](#) for international travel per diem information.
- Click [here](#) for Florida Polytechnic University travel guidelines.

Spend Authorization Information

Company * Florida Polytechnic University

Start Date * 10 / 24 / 2016

End Date * 10 / 26 / 2016

Description * Workday Conference

Business Purpose

Currency USD

Spend Authorization Details

Reimbursement Payment Type * Direct Deposit

Justification

Traveling to CITY, STATE to attend the CONFERENCE/MEETING details. Information gained will be used for knowledge and instruction benefiting the State of Florida and Florida Polytechnic University.

Helpful Links

- Click [here](#) for National/Enterprise State of Florida Contract Rental Agreement & Procedures.
- Click [here](#) to view the State of Florida Travel policies and procedures.
- Click [here](#) for international travel per diem information.
- Click [here](#) for Florida Polytechnic University travel guidelines.

Spend Aut

Company

Start Date

End Date

Description

Business Purpose

4. Input all anticipated travel expenses

a. Select “add” under “Spend Authorization Lines” tab to add a new expense

Spend Authorization Lines | Attachments

+ Add

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

+ Add

0.00

Spend Authorization Line

Expense Item *

Quantity *

Per Unit Amount *

Total Amount *

Memo

Cash Advance Requested ☐

*Cost Center

Self-Balancing Custom Org

Cost Center Programs

Grant

Project

*Fund

*Program

*CIP Code

Additional Worktags

Expense Item

Quantity

Per Unit Amount

Total Amount

...

By Expense Item Group

By Spend Category

By Alphabetical Order

By Expense Item Group

Non-travel Purchase

Travel

Travel

Airfare

Airfare - Baggage

Carpool Only

Car Rental

Gas

General Parking

Hotel Accommodations

Laundry Service

Mileage

Mileage One Way-Main Campus to/from SDC

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

Use scroll bar to access additional travel categories

Completing a Spend Authorization



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

Viewing:  

Expanded Collapsed

Expanded View

Collapsed View

*Expense Item	*Quantity	*Memo	*Total Amount
Airfare	1		220.00
Hotel accommodations	2		100.00

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)

Spend Authorization Lines Attachments

Attachments

Drop files here

or

Select Files

Attachments

Map.jpg

Comment

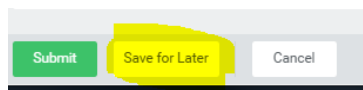
hotel.jpg

Comment

Upload

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”

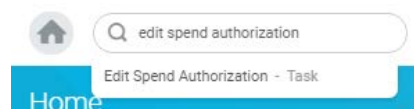
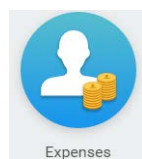


- b. You will receive a spend authorization #

View Spend Authorization SA-1600102

- c. To go back and edit a spend authorization

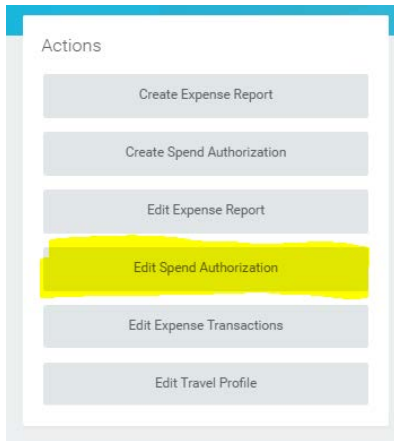
- i. Access “Expense” worklet (or) Search for “Edit Spend Authorization”



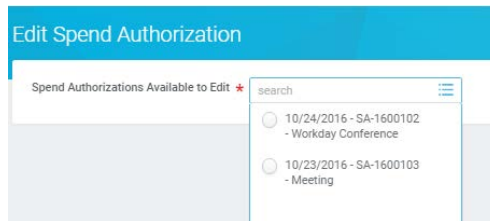
Completing a Spend Authorization



d. Select “Edit Spend Authorization”

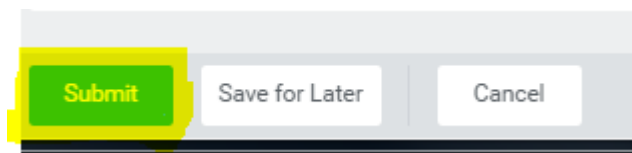


e. Choose the spend authorization you wish to revise.

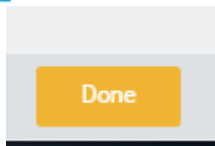


Once all additional travel expenses and backup documents have been included you can submit for approval.

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



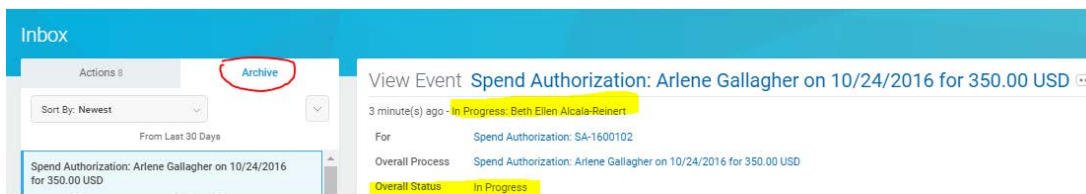
You have submitted Spend Authorization: Arlene Gallagher on 10/24/2016 for 350.00 USD



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.

