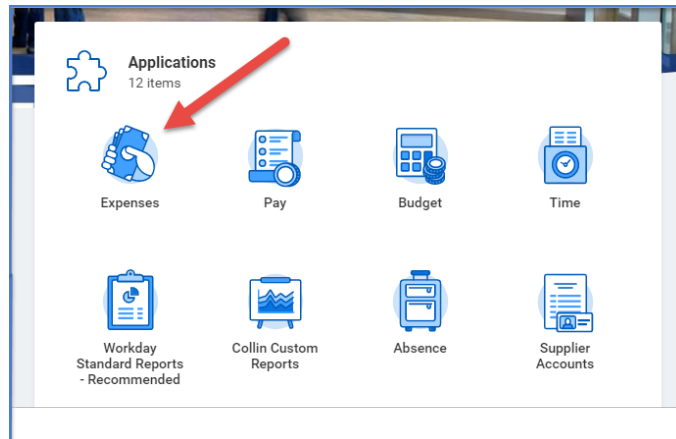


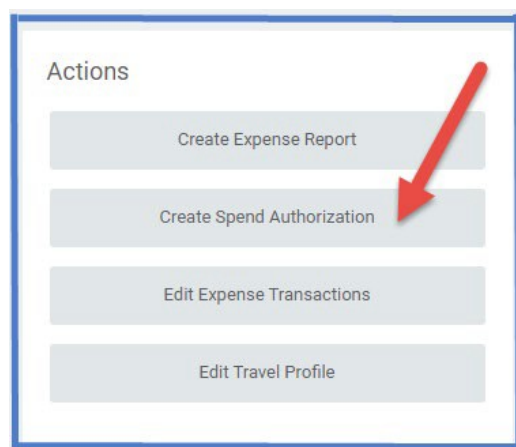
SPEND AUTHORIZATION

Spend authorizations are used to obtain approval for future travel. Employees complete and submit these requests based on **ESTIMATED** costs.

1. On the Home Screen - Click on the **Expenses** worklet.
(If preferred, Create Spend Authorization can be typed into search bar.)



2. Under Actions – Choose Create Spend Authorization.
(If using search bar, then Create Spend Authorization Task needs to be selected.)



3. Complete the following:
 - **Company** -- Collin College auto-populates.
 - **Start Date** -- Enter date of first day of travel.
 - **End Date** -- Enter date of last day of travel.
 - **Description** -- Type name of conference, training, etc., and year.
 - **Business Purpose** -- From drop down menu choose appropriate reason for travel.
Note: Faculty requesting COE funds need to select Council on Excellence (COE).
 - **Spend Authorization Total** -- This box will auto-populate based on line item totals.

- **Cost Center** -- Type in assigned Cost Center or choose from drop-down menu. (If Cost Center auto-populates, then verify it is correct.)
Note: If COE is selected as the Business Purpose, then COE must also be selected as the Cost Center – CC1561.
- **Additional Worktags** -- Will auto-populate based on the Cost Center.
- **Item Details** -- Needs to be completed and depends upon expense type selected.

The screenshot shows the 'Spend Authorization Line' form. A red arrow points to the 'Hotel / Lodging' expense item with a value of 537.00. Another red arrow points to the 'Quantity' field, which contains the value '3'. A third red arrow points to the 'Per Unit Amount' field, which contains '179.00'. A fourth red arrow points to the 'Total Amount' field, which contains '537.00'. On the right side, a red arrow points to the 'Item Details' section, which includes fields for 'Hotel' (Marriot), 'Arrival Date' (07/07/2021), and 'Departure Date' (07/10/2021). At the bottom, a red box highlights the 'Worktags' section, which includes fields for '*Cost Center' (CC1259 Finance & Budgeting), 'Grant', 'Project', and '*Additional Worktags' (Campus: CA14 Districtwide, Division: DV40 Administrative Services, Fund: FD100 Unrestricted, Program: PG350 Institutional Support).

6. Add additional lines as needed for multiple expense Items.
7. Go to Attachments tab -- Click here to add the conference agenda and any other appropriate documents. (Attachments can be dropped into the gray box or selected from browser.)



8. Click Submit.

Note -- A notification box pops up showing the Spend Authorization has been submitted. Authorization will go to approver.

To find the Spend Authorization number (Example – SA-100032) click on View Details.

To determine the status of the Spend Authorization, click on Details and Process. Details of the authorization will be shown. Click on Process to see the status of the report.