Travel Create Spend Authorization

Access the Create Spend Authorizations

1. Type Create Spend Authorization in the search bar.
2. Select Create Spend Authorization from the search results.
3. First, review important instructions section. This section is included for your reference at the top of the form.
4. Check Company name, change as needed.
5. Enter the trip Start Date.
6. Enter the trip End Date.
7. Enter the Description of the trip.
8. Enter the Business Purpose.
9. Move over to the Justification box, type justification for the trip.
10. Under Spend Authorization Lines tab, click “+” sign next to the word *Item.
11. Click prompt button on the expense item box and select “By Expense Item Group.”
12. Select “Travel.”
13. Select an Expense Item you wish to include in the report.
14. Type in quantity and per unit amount for your expense item.
15. Skip Memo and Billable section unless you want something in the Memo field.
16. Check the Cash Advance Requested box if this Spend Authorization is for a Cash Advance.
17. Type in SmartTag. This will populate Fund, Cost Center, Grant, Project, and Additional Worktag fields as applicable.
18. Tab over to Expense Treatment column and select prompt button to the right of the Expense treatment box and select “Worktag” and then “Expense Treatment.
19. Select appropriate "Expense Treatment" for this line item.
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20. Should you require additional lines redo above steps as the new lines will pre-populate.
21. Click the Attachments tab to include documents related to the spend authorization.
22. Click on paperclip to the right and select document that you would like to attach.
23. After adding necessary expense items and attachments, choose an option:
   a. Submit the spend authorization for approval. It will then enter into the approval process and will route as needed per the business process. You will not be able to submit until all required field are complete.
   b. Save for Later the spend authorization. If not ready to submit yet.
   c. Cancel the spend authorization if you no longer need the spend authorization.

24. You can check the Business Process once you have submitted by Clicking of the Process tab.