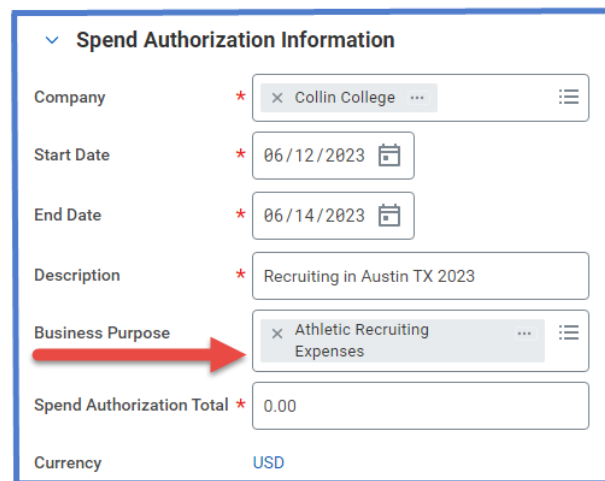


**Spend authorizations are used to obtain approval for future travel. Employees complete and submit these requests based on ESTIMATED costs.**

1. Type **Create Spend Authorization** into the search bar.
2. Click on the Create Spend Authorization Task.
3. Complete the following under **Spend Authorization Information**:
  - **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 description and year.
  - **Business Purpose** -- Choose **Athletic Recruiting Expenses** from drop down menu.
  - **Spend Authorization Total** -- This box will auto-populate based on line item totals.



**▼ Spend Authorization Information**

Company \*

Start Date \*

End Date \*

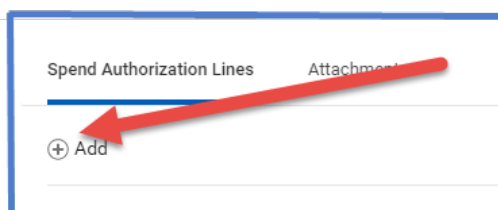
Description \*

Business Purpose \*

Spend Authorization Total \*

Currency USD

4. Spend Authorization Details:
  - Justification -- Provide a brief explanation why trip is being requested.
5. Scroll down to **Spend Authorization Lines**.
  - Click the **Add Row** icon (+) to add an expense line item.
  - Example: Airfare, Hotel, Per Diem, etc.



Spend Authorization Lines      Attachment

+ Add

6. Complete the following for each Spend Authorization line:

- **Expense Item** -- Type or choose Athletic Recruiting Expense item from drop-down menu.
- **Quantity** -- Enter quantity.
- **Per Unit Amount** -- Amount of expense.
- **Total Amount** -- Will auto-populate.  
(WorkDay calculates the Quantity times Per Unit Amount).
- **Memo** -- Add description of expense – Airfare, hotel, per diem, etc.
- **Cost Center** -- Cost Center auto-populates - verify it is correct.
- **Additional Worktags** -- Will auto-populate based on the Cost Center.  
DO NOT CHANGE.

**NOTE** -- For mileage: This will be the estimated miles driven to and from recruiting location. Expense Item will be Mileage – Travel. Home campus will be used in mileage calculations. **Two** entries will need to be entered – one for the drive TO destination and one for the drive FROM destination.

**Spend Authorization Line**

Athletic Recruitment Expense 300.00

Expense Item \* x Athletic Recruitment Expense ...

Quantity \* 1

Per Unit Amount \* 300.00

Total Amount \* 300.00

Budget Date \* 06/12/2023

Memo Hotel

Billable ☐

Worktags

\*Cost Center x CC1071 Athletics ...

Grant ...

Project ...

\*Additional Worktags

- x Campus: CA14 Districtwide ...
- x Division: DV20 Office of the Executive Vice President ...
- x Fund: FD300 Auxiliary ...
- x Program: PG500 Auxiliary Enterprises ...

7. Add additional lines as needed for multiple expense Items.

8. Go to Attachments tab -- Click here to add documentation for trip.  
(Attachments can be dropped into the gray box or selected from browser.)



9. Click Submit.

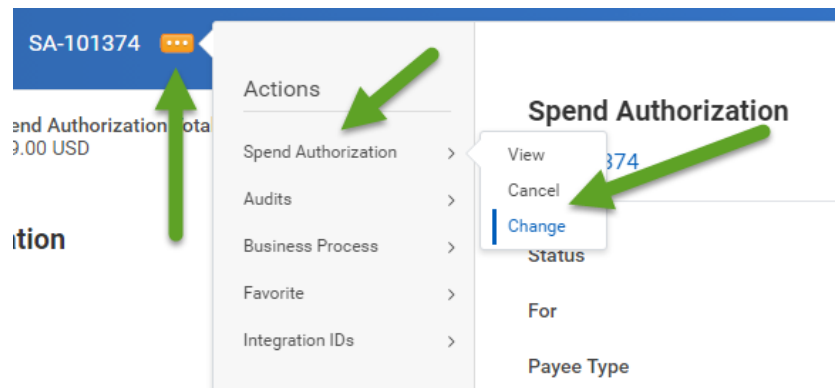
**Note** -- A notification box pops up showing the Spend Authorization has been submitted. Authorization will go to approver.

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

To determine the **status of the Spend Authorization**, enter the SA number into the search bar and open up the report. Click on Process History. This will show who needs to approve, who has approved, and any notes the approver wrote regarding the report.

To **Change or Cancel a Spend Authorization**:

1. Open up report.
2. Click on the action items (box with three dots). This brings up a menu.
3. Hover over the words Spend Authorization. This brings up another menu.
4. Click on the word change or cancel depending on what needs to be done.



- If making changes to the report – make changes then click the orange submit button. Report will go back through approvals.
- If canceling the report – make sure to hit the orange OK button or the report will not be canceled.