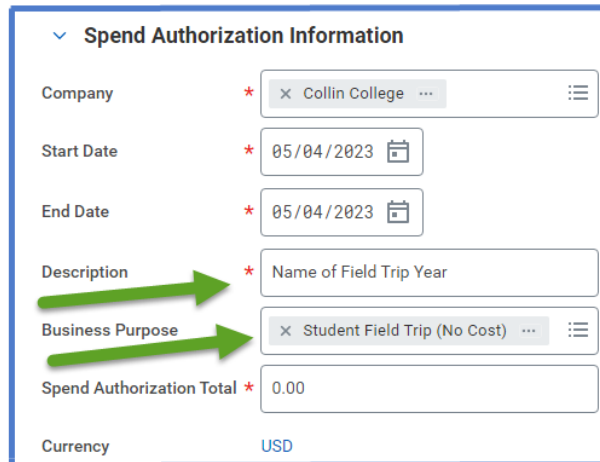


**Spend authorizations are used to obtain approval for future travel. Employees complete and submit these requests based on ESTIMATED costs.**

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 name of Field Trip/Event and year.
  - **Business Purpose** -- Choose Student Field Trip (No Cost) from drop down menu.
  - **Spend Authorization Total** -- This box will auto-populate based on line item totals.



**Spend Authorization Information**

Company \* x Collin College ...

Start Date \* 05/04/2023

End Date \* 05/04/2023

Description \* Name of Field Trip Year

Business Purpose \* x Student Field Trip (No Cost) ...

Spend Authorization Total \* 0.00

Currency USD

4. Spend Authorization Details:
  - Justification -- Provide an explanation why trip is being requested.
5. Scroll down to **Spend Authorization Lines**.
  - Click the **Add Row** icon (+) to add an expense line item.

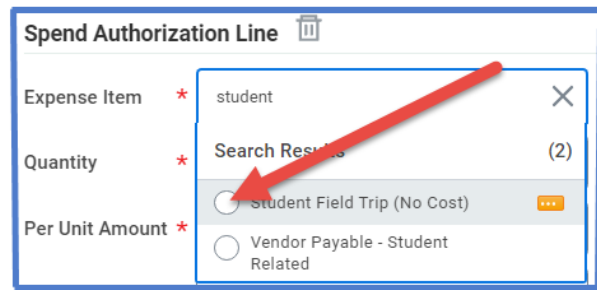


Spend Authorization Lines Attachment

+ Add

6. Complete the following for the Spend Authorization line:

- **Expense Item** -- Type Student Field Trip (No Cost) or choose from drop-down menu.



Spend Authorization Line

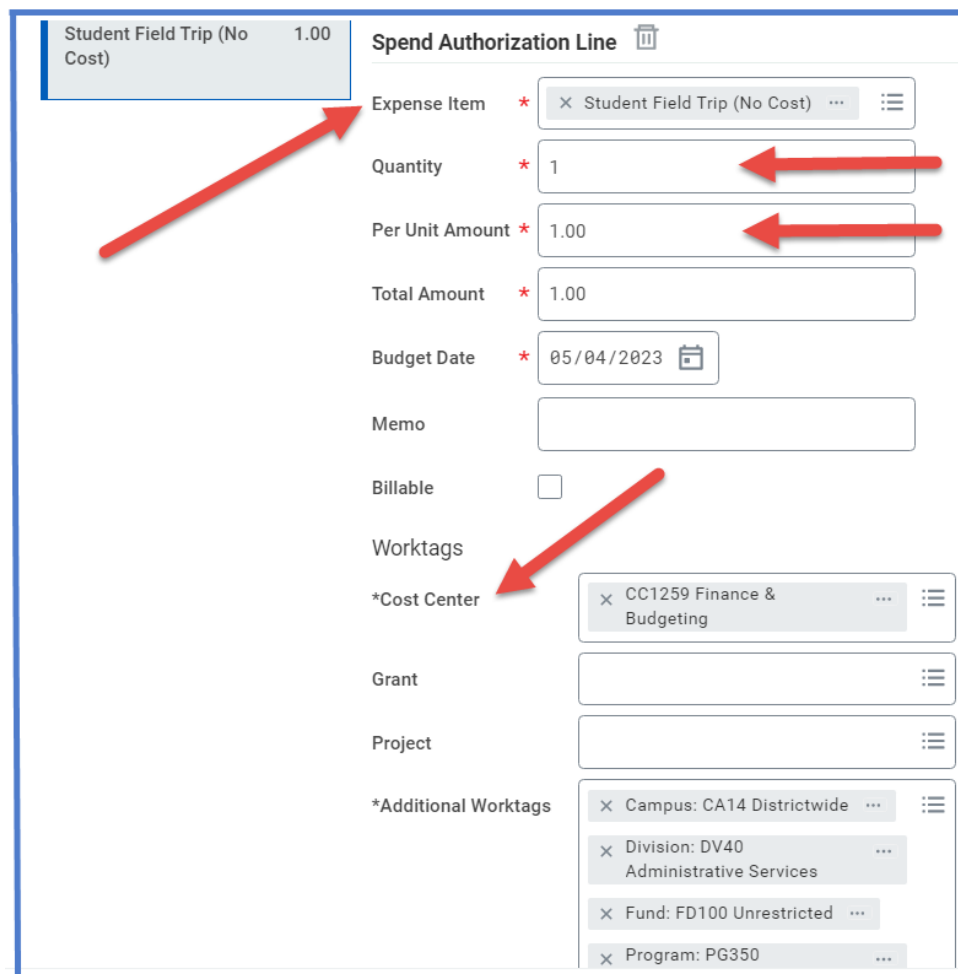
Expense Item \* student

Quantity \* Search Results (2)

Per Unit Amount \* Student Field Trip (No Cost)

Vendor Payable - Student Related

- **Quantity** -- Enter quantity.
- **Per Unit Amount** -- Add \$1.00.  
(This amount is not charged to the department – amount needs to be entered to submit the spend authorization.)
- **Total Amount** -- Will auto-populate
- **Memo** -- Add any pertinent information.
- **Cost Center** -- Departmental Cost Center auto-populates - verify it is correct.
- **Additional Worktags** -- Will auto-populate based on the Cost Center.  
DO NOT CHANGE.



Student Field Trip (No Cost) 1.00

Spend Authorization Line

Expense Item \* X Student Field Trip (No Cost) ...

Quantity \* 1

Per Unit Amount \* 1.00

Total Amount \* 1.00

Budget Date \* 05/04/2023

Memo

Billable ☐

Worktags

\*Cost Center X CC1259 Finance & Budgeting ...

Grant

Project

\*Additional Worktags X Campus: CA14 Districtwide ...

X Division: DV40 Administrative Services ...

X Fund: FD100 Unrestricted ...

X Program: PG350 ...

7. Go to Attachments tab -- Click here to add information regarding the Field Trip.



(Attachments can be dropped into the gray box or selected from browser.)

8. Click Submit.

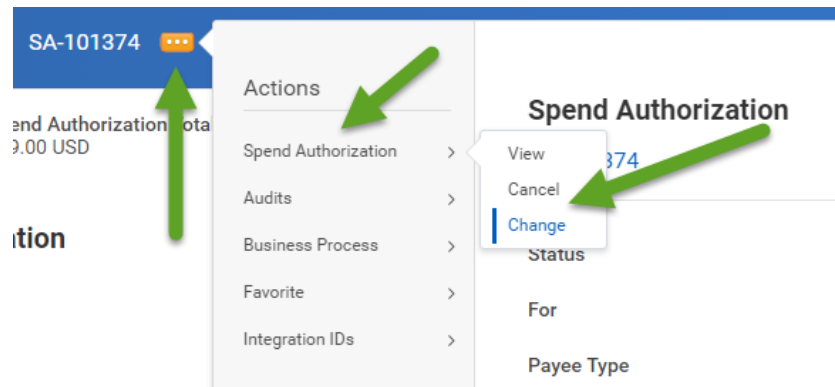
**Note** -- A notification box pops up showing the Spend Authorization has been submitted. Authorization will go to approver.

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

To determine the **status of the Spend Authorization**, 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.