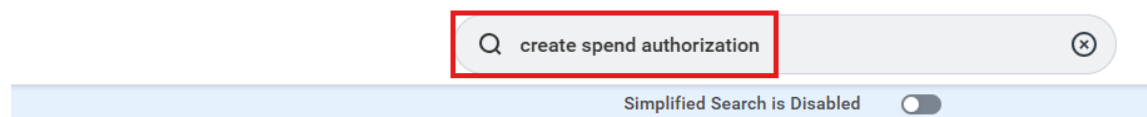


Create Spend Authorization

Spend Authorizations are required for ALL travel and must be submitted PRIOR to the trip's commencement

Please refer to [Travel Manual](#)

1. Type “**Create Spend Authorization**” in the search bar and select Create Spend Authorization from the search results.

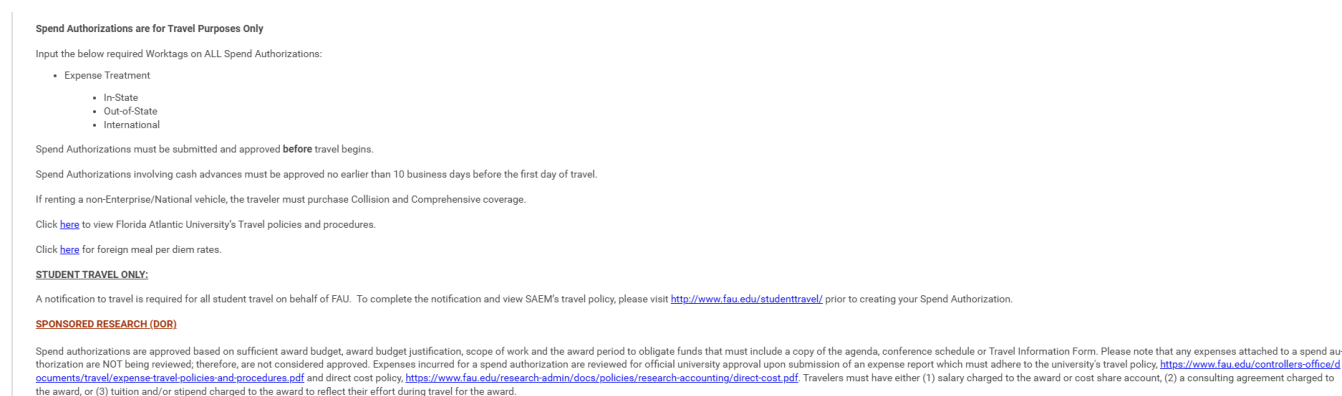


A search bar with the text "create spend authorization" inside. To the right of the search bar is a toggle switch labeled "Simplified Search is Disabled".

Tasks and Reports

[Create Spend Authorization](#)
Task

2. Review important instructions section. This section is included for your reference at the top of the form.



Spend Authorizations are for Travel Purposes Only

Input the below required Worktags on ALL Spend Authorizations:

- Expense Treatment
 - In-State
 - Out-of-State
 - International

Spend Authorizations must be submitted and approved **before** travel begins.

Spend Authorizations involving cash advances must be approved no earlier than 10 business days before the first day of travel.

If renting a non-Enterprise/National vehicle, the traveler must purchase Collision and Comprehensive coverage.

Click [here](#) to view Florida Atlantic University's Travel policies and procedures.

Click [here](#) for foreign meal per diem rates.

STUDENT TRAVEL ONLY:

A notification to travel is required for all student travel on behalf of FAU. To complete the notification and view SAEM's travel policy, please visit <http://www.fau.edu/studenttravel/> prior to creating your Spend Authorization.

SPONSORED RESEARCH (DOR)

Spend authorizations are approved based on sufficient award budget, award budget justification, scope of work and the award period to obligate funds that must include a copy of the agenda, conference schedule or Travel Information Form. Please note that any expenses attached to a spend authorization are NOT being reviewed; therefore, are not considered approved. Expenses incurred for a spend authorization are reviewed for official university approval upon submission of an expense report which must adhere to the university's travel policy, <https://www.fau.edu/controllers-office/documents/travel/expense-travel-policies-and-procedures.pdf> and direct cost policy, <https://www.fau.edu/research-admin/docs/policies/research-accounting/direct-cost.pdf>. Travelers must have either (1) salary charged to the award or cost share account, (2) a consulting agreement charged to the award, or (3) tuition and/or stipend charged to the award to reflect their effort during travel for the award.

3. The Company name will auto populate to Florida Atlantic University

✓ Spend Authorization Information

Company *

4. It is important that the dates reflected here match the dates of your trip.

Start Date *

End Date *

5. Enter the **Description** of the trip (Destination, number of days, conference name, etc.)

Description *


- 6. Enter **Travel** as a Business Purpose. *If Athletics Travel – please select accordingly***

SPONSORED RESEARCH (DOR)

Spend authorizations are approved based on sufficient award budget, and therefore, are not considered approved. Expenses incurred for a spend cost policy, <https://www.fda.gov/oc/foia>

cost policy, <https://www.fishbase.org/>

▼ **Spend Author**

Company *	<input type="radio"/> ECM Reimbursements ...
Start Date *	<input type="radio"/> OTHER EMPLOYEE REIMBURSEMENTS ...
End Date *	<input type="radio"/> Pcard PURCHASE: NON-TRAVEL ...
Description *	<input type="radio"/> TRAVEL ...
	<input type="radio"/> TRAVEL - ATHLETICS - In State Recruiting ...
	<input type="radio"/> TRAVEL - ATHLETICS - International Recruiting ...
	<input type="radio"/> TRAVEL - ATHLETICS - Out of State Recruiting ...
	<input type="radio"/> TRAVEL - Pre-Hire ...
Business Purpose	Search 

Currency USD

7. Type a detailed justification for the trip – including the benefit to the state and business purpose. **If this information is not included in the justification, your spend authorization may be sent back.**

Spend Authorization Details

Reimbursement Payment Type *

×

Direct Deposit

Justification

8. Under Spend Authorization Lines tab, click “+ Add.” You will break down each cost of your trip by expense item such as Per Diem, Airfare, Hotel/lodging, etc. Please note that per each amount requested, a supporting documentation must be provided such as a quote/estimate.

[Spend Authorization Lines](#) [Attachments](#)

9. Select the appropriate Expense Item for this spend authorization.

Spend Authorization Lines Attachments

+ Add

0.00	Spend Authorization Line
Expense Item *	Search
Quantity *	By Expense Item Group >
Per Unit Amount *	By Spend Category >
	By Alphabetical Order >
Total Amount *	0.00

10. Continue down the form and fill out all required fields (*).

Quantity *	1
Per Unit Amount *	0.00
Total Amount *	0.00
Budget Date *	03/26/2025
Memo	

11. If a Cash Advance is needed, please check this box in each expense line. Please refer to the Travel and Expense Manual to verify if your request qualifies for cash advance.

Budget Date *	03/26/2025
Memo	
Cash Advance Requested	<input type="checkbox"/>

Worktags

12. Your SmartTag will auto populate based on your job; however, these may be edited. It will populate Fund, Cost Center, Grant, Project, and Additional Worktag fields as applicable.

Worktags	
*SmartTag	<div> <div>×</div> <div>TAG</div> <div>CF</div> <div>...</div> </div>
*Fund	<div> <div>×</div> <div>FAU_F0</div> <div>...</div> </div>
*Cost Center	<div> <div>×</div> <div>CC0</div> <div>...</div> </div>
Grant	
Gift	
Project	
*Expense Treatment	
Expense Classification	
Internally Funded Research (IFR)	
*Additional Worktags	<div> <div>×</div> <div>Business Unit: BU001 Boca</div> <div>...</div> </div> <div> <div>×</div> <div>Program: BOG_09_Other Facilities Req</div> <div>...</div> </div>

13. Add more lines if necessary for each type of Travel expense.

The screenshot shows the 'Spend Authorization Lines' tab. At the top, there are two tabs: 'Spend Authorization Lines' (active) and 'Attachments'. Below the tabs, there is a red-bordered button with a plus icon and the text 'Add'. Below this button is a table with one row. The first column is labeled 'Expense Item' and contains the text 'Animals'. The second column is labeled 'Quantity' and contains the value '0.00'. To the right of the table, the text 'Spend Authoriz' is partially visible.

14. Under the Attachment tab, all corresponding documentation must be included

- Quotes/estimates as back-up for amounts requested.
- Flyer/Agenda of conferences – Itinerary/Agenda for research related trips.
- Additional documentation to support the request.

The screenshot shows the 'Attachments' tab. At the top, there are two tabs: 'Spend Authorization Lines' and 'Attachments' (active). Below the tabs, the word 'Attachments' is displayed. Below this, there is a large light blue area with a dashed border. In the center of this area, there is a prompt 'Drop files here' with a small 'or' below it. Below the prompt is a red-bordered button with the text 'Select files'.

15. After adding necessary expense items and attachments, choose an option:

- Submit the spend authorization for approval. It will then enter the approval process and will route as needed per the business process. You will not be able to submit until all required fields are complete.
- Save for Later the spend authorization if not ready to submit yet.
- Cancel the spend authorization if you no longer need the spend authorization

The screenshot shows three buttons at the bottom of the form. The first button is blue with the text 'Submit'. The second button is light blue with a dashed border and the text 'Save for Later'. The third button is light blue with a dashed border and the text 'Cancel'.

Tip: Once submitted, you can check the Business Process to see who the next approver is. Simply click on “Details and Process”

The screenshot shows the 'You have submitted' confirmation screen. At the top, there is a dark blue banner with the text 'You have submitted' in white. To the right of this text, there is a link 'Spend Authorization: SPEND_AUTH-00007918' and a date '2/11/2025 for 100.00 USD' with a three-dot menu icon. Below the banner, there are two columns. The left column is titled 'Up Next' and contains the text 'Check Budget (Financial) for Spend Authorization - Batch/Job: Run Budget Check'. The right column is titled 'Do Another' and contains three links: 'Create Spend Authorization', 'Create Spend Authorization for Non-Worker', and 'Create Spend Authorization for Worker'. At the bottom left, there is a red-bordered button with a right arrow icon and the text 'Details and Process'.