

Expenses: Creating & Editing an Authorization Request

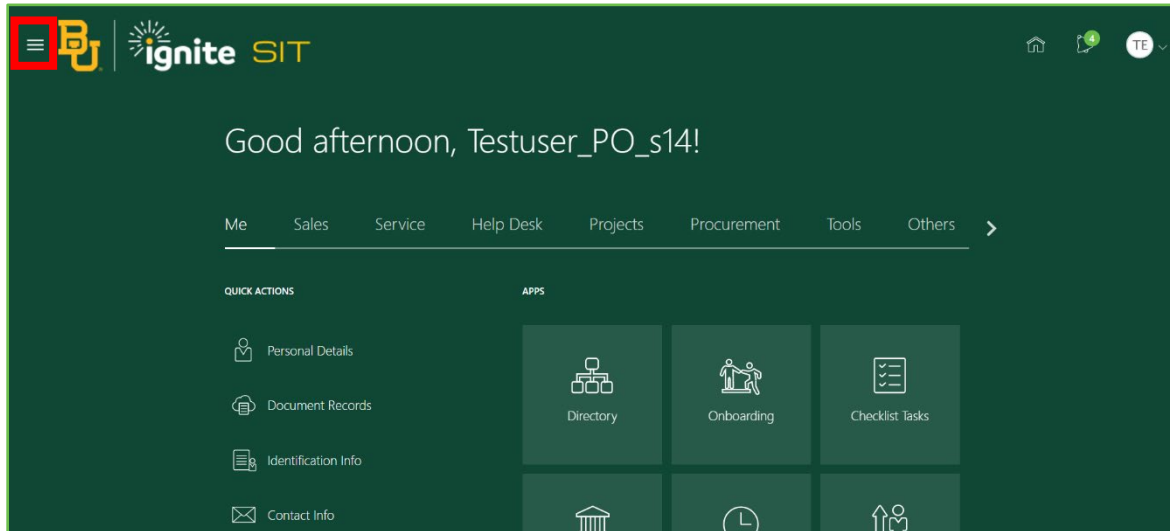
Overview

- An authorization is a request by an employee for approval of estimated expenses for a future activity.
- An itemized list of the expected expense items and their costs is required information to create an authorization request.
- Authorization requests can be saved and stored in progress to be submitted or edited at a later time.
- An authorization request proceeds through the following process, which the employee initiates:
 - Employee submits an authorization request
 - Line manager approves the authorization request
 - Link the authorization to the Expense Report (See ***Creating an Expense Report Job Aid*** for additional information).
- Authorization requests **DO NOT** encumber funds.

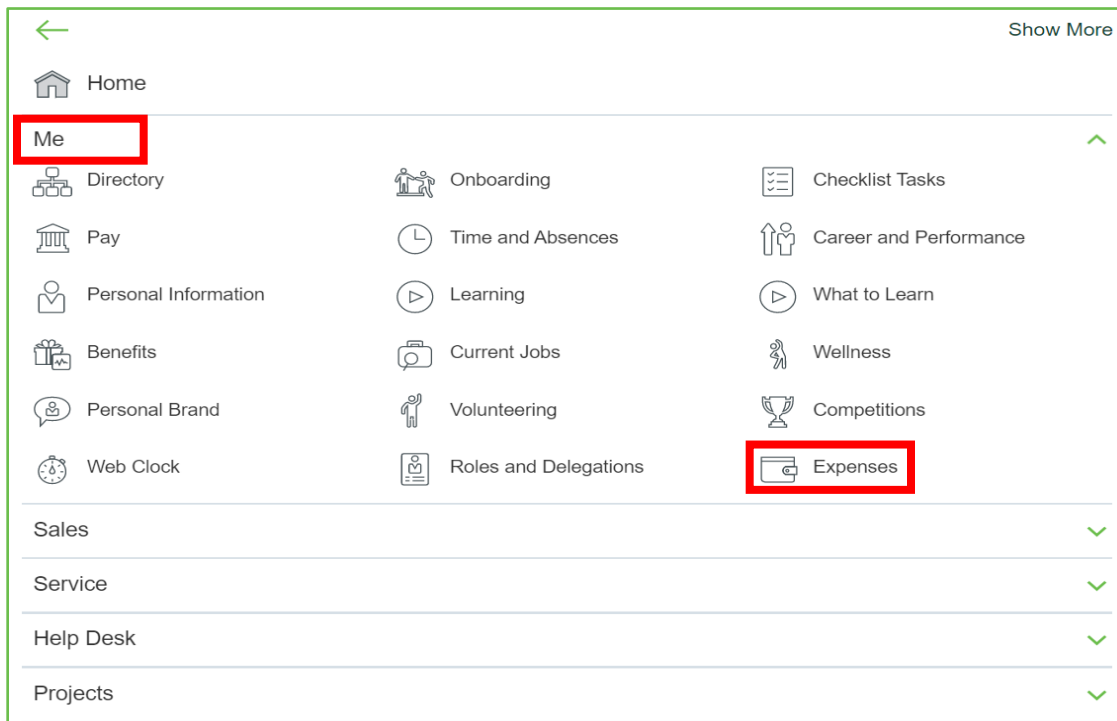
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I. Navigating to the Self-Service Module

- I. You can access the **Expenses** section in two ways:
 - a. Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.

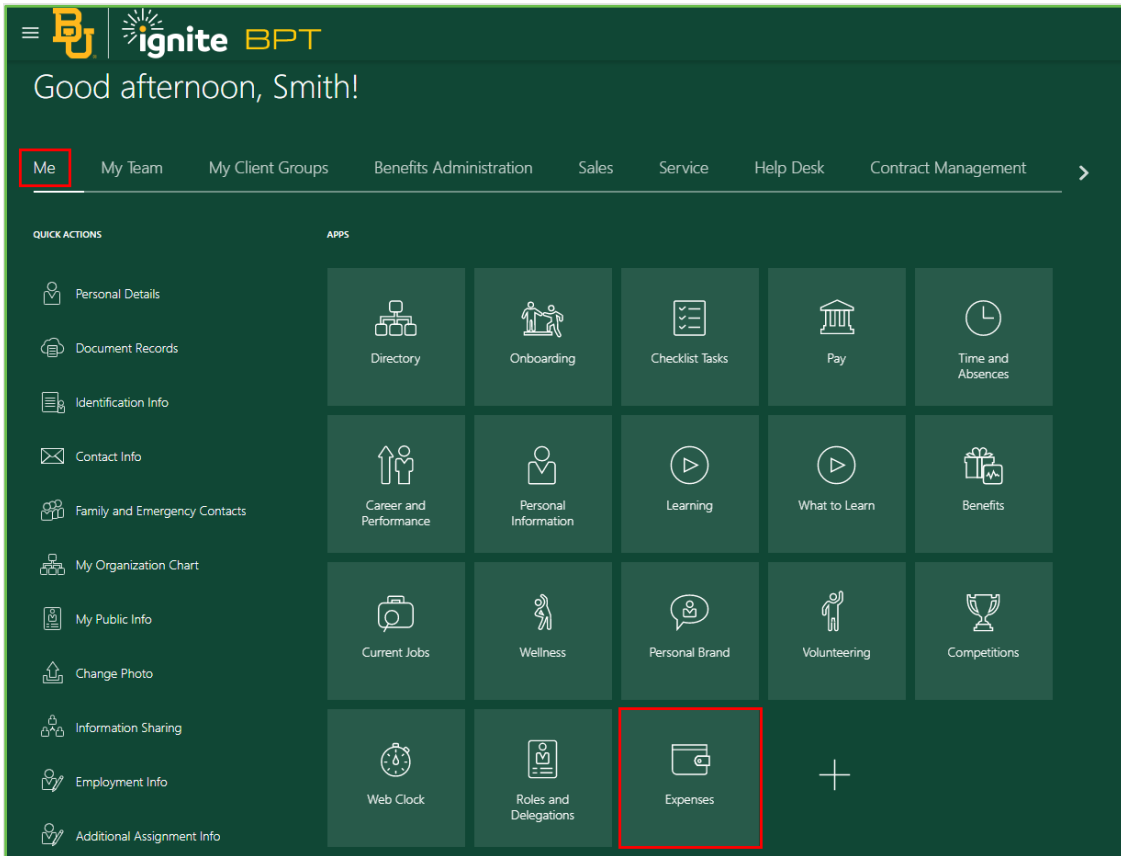


- b. (Option I) Under the **Me** section, click the dropdown arrow, and select **Expenses** from the dropdown list.



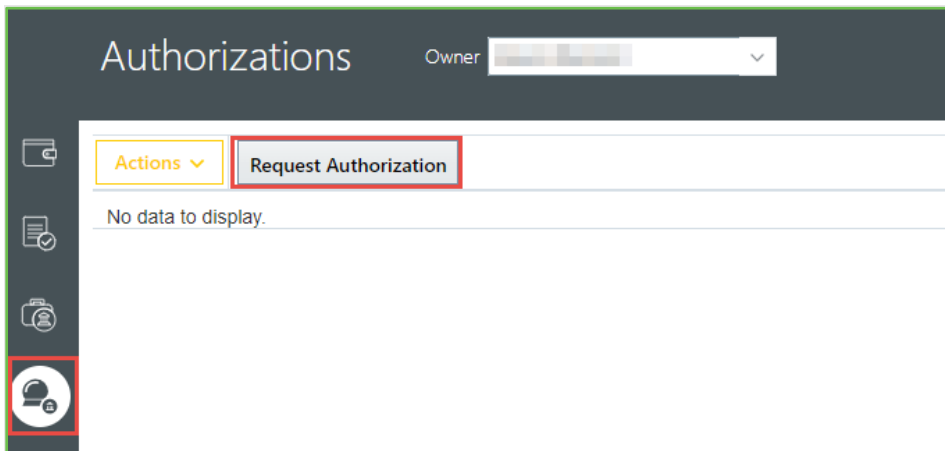
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- c. (Option 2) Under the **Me** heading on the home page, you can scroll down and click on the **Expenses** tile on the Main Page.



2. Request an Authorization

- I. Upon entering the **Travel and Expenses** work area, click the **Authorizations** icon (the one that looks like a snow globe on the left side of the screen.) Then click **Request Authorization**.



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2. Enter the following (* = required field)
 - a. ***Purpose** – Enter the purpose of the Authorization Request.
 - b. ***Expense Location** – Select the location the anticipated expenses will occur from the dropdown feature, or search by address.
 - c. ***Start Date** – Select the date from the calendar.
 - d. ***End Date** – Select the date from the calendar.
 - e. **Attachments** – If available, click on the Plus “+” icon to attach supporting documents. Such as details of excepted conference expenses from the hosting website.

Request Authorization ?

* Purpose	<input type="text" value="Training"/>	Estimated Total 0.00 USD
* Expense Location	<input type="text" value="Orlando, Orange, FL, United States"/> ▼	
* Start Date	<input type="text" value="09/01/2023"/> 📅	
* End Date	<input type="text" value="09/08/2023"/> 📅	
Attachments	None +	

Estimated Expenses (0)

+

3. Enter the **Estimated Expense Items**. Scroll down to the **Estimated Expenses** section of the window. Click on the Create Item “+” icon.

Estimated Expenses (0)

+

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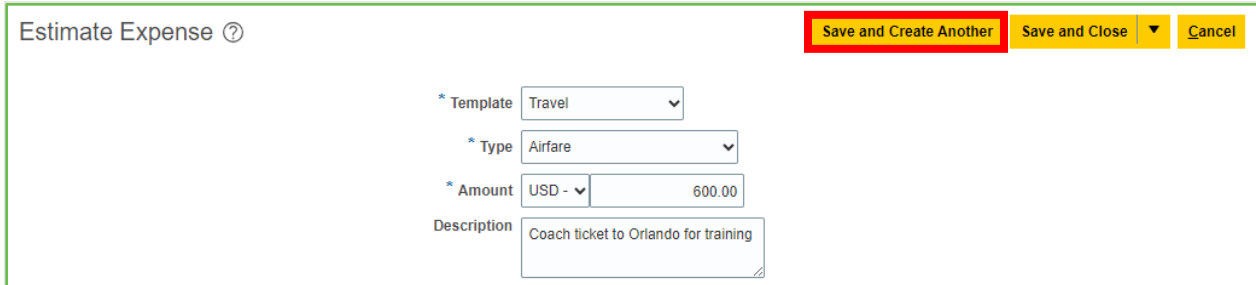
4. Enter the following (* = required field)
 - a. ***Template** – Select the Expense Template best describing your request.
 - b. ***Type** – Select the Expense Type from the dropdown list. *See Using Expense Types Job Aid for guidance on various expense types.*
 - i. Note: Depending on the Expense Type chosen, additional fields may be required.
 - c. ***Amount** – Enter the amount (default currency is USD, do not change).
 - d. **Description** – Describe the nature of the expense in the written text box.

The screenshot shows a form for creating an expense authorization request. The fields are as follows:

- * Template**: Dropdown menu with "Travel" selected.
- * Type**: Dropdown menu with "Airfare" selected.
- * Amount**: Currency dropdown set to "USD" and a text box containing "600.00".
- Description**: Text box containing "Coach ticket to Orlando for training".
- Attachments**: "None" with a plus sign icon.
- Account**: Text box containing "110-10706-100-1000000-93840-701-01" with a magnifying glass icon.
- Project Number**: Text box with a magnifying glass icon.
- Task Number**: Text box.
- Expenditure Type**: Dropdown menu.
- Expenditure Organization**: Dropdown menu.
- Contract Number**: Text box.
- Funding Source**: Text box.
- Airline Fee Type**: Dropdown menu with "Ticket" selected.
- Passenger Affiliation**: Dropdown menu with "Employee" selected.

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5. There are two different ways to add additional **Estimated Expense Items** to the **Authorization Request**.
- (Option 1) Click the **“Save and Create Another”** button in the top right corner. This will take you automatically to another estimated expense item.



Estimate Expense ? Save and Create Another Save and Close Cancel

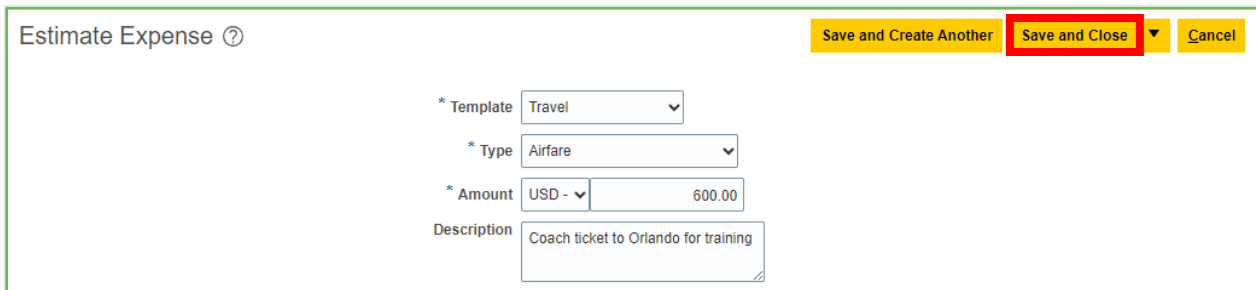
* Template

* Type

* Amount

Description

- Repeat step 5, entering all required and optional fields.
 - Repeat steps until all Estimated Expense Items have been added.
 - Click the **“Save and Close”** button in the top right corner.
- (Option 2) Click the **“Save and Close”** button in the top right corner.



Estimate Expense ? Save and Create Another Save and Close Cancel

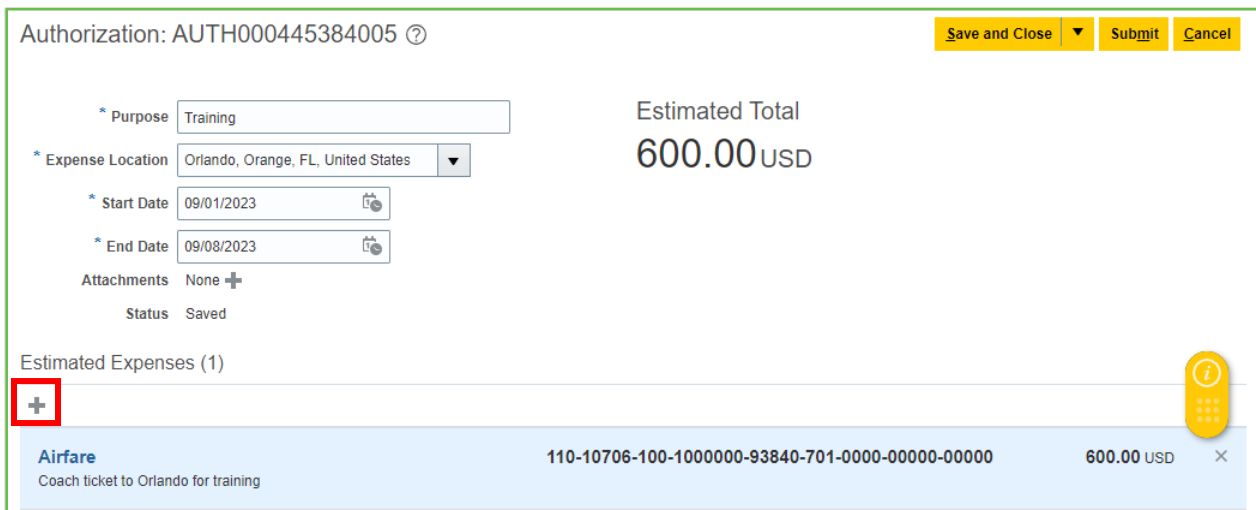
* Template

* Type

* Amount

Description

- To add another Estimated **Expense Item**, scroll down to the **Estimated Expenses** section of the window. Click on the Create Item **“+”** icon.



Authorization: AUTH000445384005 ? Save and Close Submit Cancel

* Purpose Estimated Total **600.00 USD**

* Expense Location

* Start Date

* End Date

Attachments

Status

Estimated Expenses (1)

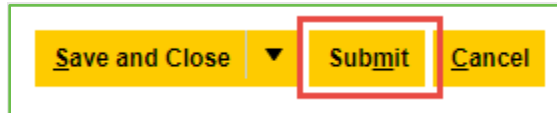
+

Airfare Coach ticket to Orlando for training	110-10706-100-1000000-93840-701-0000-00000-00000	600.00 USD	X
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- Repeat step 5, entering the required and optional fields.
- Repeat steps until all **Estimated Expense Items** have been added.

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6. You have the option to either submit your **Authorization Request** now or save and submit it later. To submit now:
 - a. Confirm that you have no missing required fields in your **Authorization Request** or your **Estimated Expense Items**.
 - b. Click on the “**Submit**” button in the top right corner.

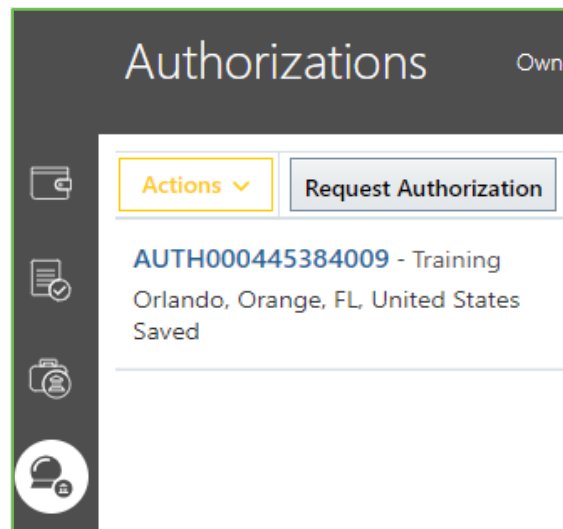


Note: If you were missing a required field for any of the Estimated Expense Items you created above, you will not be able to submit the report until the information is added. To open an estimated expense for edits, simply click the expense type that was selected.

7. If you are not yet ready to submit your **Authorization Request**, you can save it and submit it later.
 - a. Confirm that you have no missing required fields in your **Request**.
 - b. Click on the “**Save and Close**” button in the top right corner.



- c. When returning to the **Travel and Expenses** work area, navigate back to the **Authorizations** page by clicking on the Authorizations icon, and click the **Authorization Request** number to open it.



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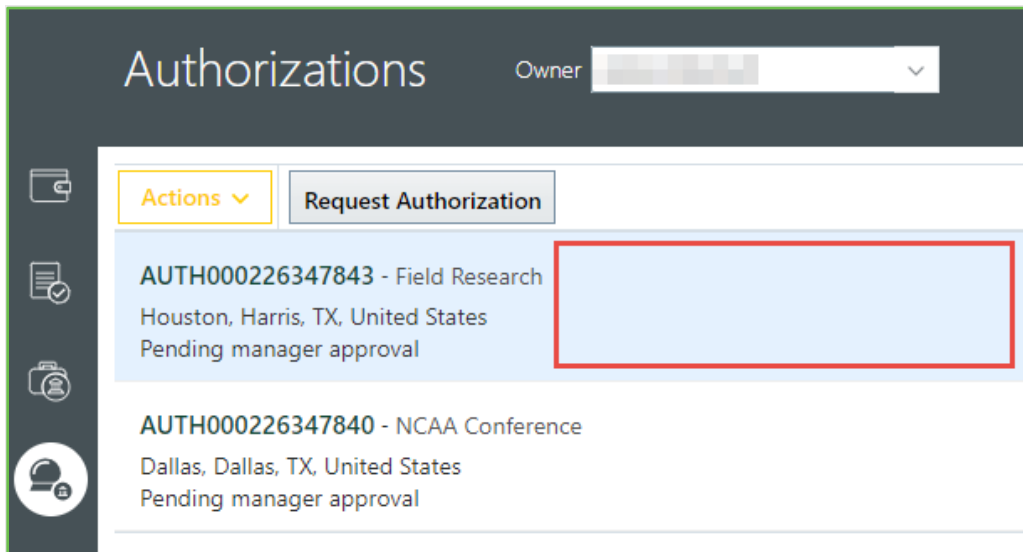
- d. Click on the “**Submit**” button in the top right corner of the window. Your report has now been submitted to your line manager for approval.



Note: If you were missing a required field for any of the Estimated Expense Items you created above, you will not be able to submit the report until the information is added. To open an estimated expense for edits, simply click the expense type that was selected.

3. Withdrawing and Deleting an Authorization

1. Select the report you wish to **WITHDRAW** by clicking on the white part of the line (clicking the request number will open the report), the selected line will be highlighted blue.



2. Click the **Actions** button, then select **Withdraw**.

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3. The report is now back in the user's queue to edit, resubmit, or delete (if the report failed to withdraw, you may need to clear your browser's cache). The status will show as **Withdrawn**.

A screenshot of an authorization form. At the top, it says "Authorization: AUTH0021974314". Below this are several fields: "* Purpose" with a dropdown menu set to "Training"; "* Expense Location" with a dropdown menu set to "Orlando, Orange, FL, United States"; "* Start Date" with a date picker set to "3/23/20"; and "* End Date" with a date picker set to "3/27/20". Below these fields is "Attachments" set to "None". At the bottom, there is a "Status" field with a dropdown menu set to "Withdrawn", which is highlighted with a red rectangular box.

4. To **DELETE** an Authorization that is in your queue, click the **X** on the right of the screen and confirm that you want to delete it.

A screenshot of a table titled "Request Authorization". The table has a header row with "Actions" (dropdown), "Request Authorization", and "See All". Below the header is a single row of data. The row contains: "AUTH000226347843 - Field Research", "1 item", "489.00 USD", "Houston, Harris, TX, United States", "11/30/2021", and "Withdrawn". A red square with a white "X" is positioned to the right of the "11/30/2021" date, indicating a delete action.

Note: Approved Authorizations cannot be withdrawn or deleted. If the Authorization is not used or applied to an expense item within 180 days, it will expire and cannot be applied to a future expense report.