Expenses: Creating & Editing an Authorization Request

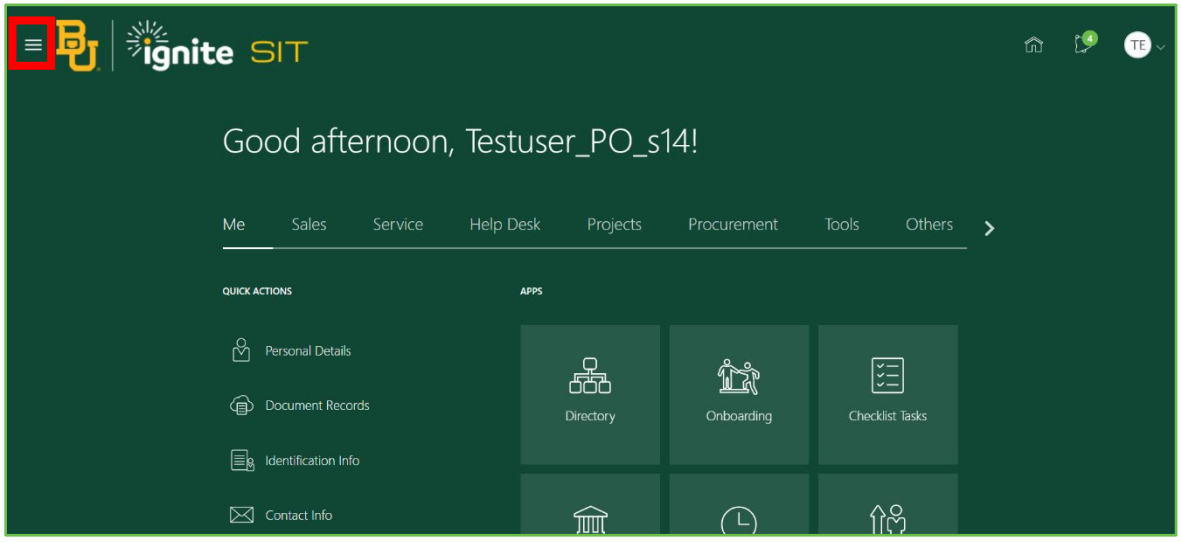
Overview

- 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.

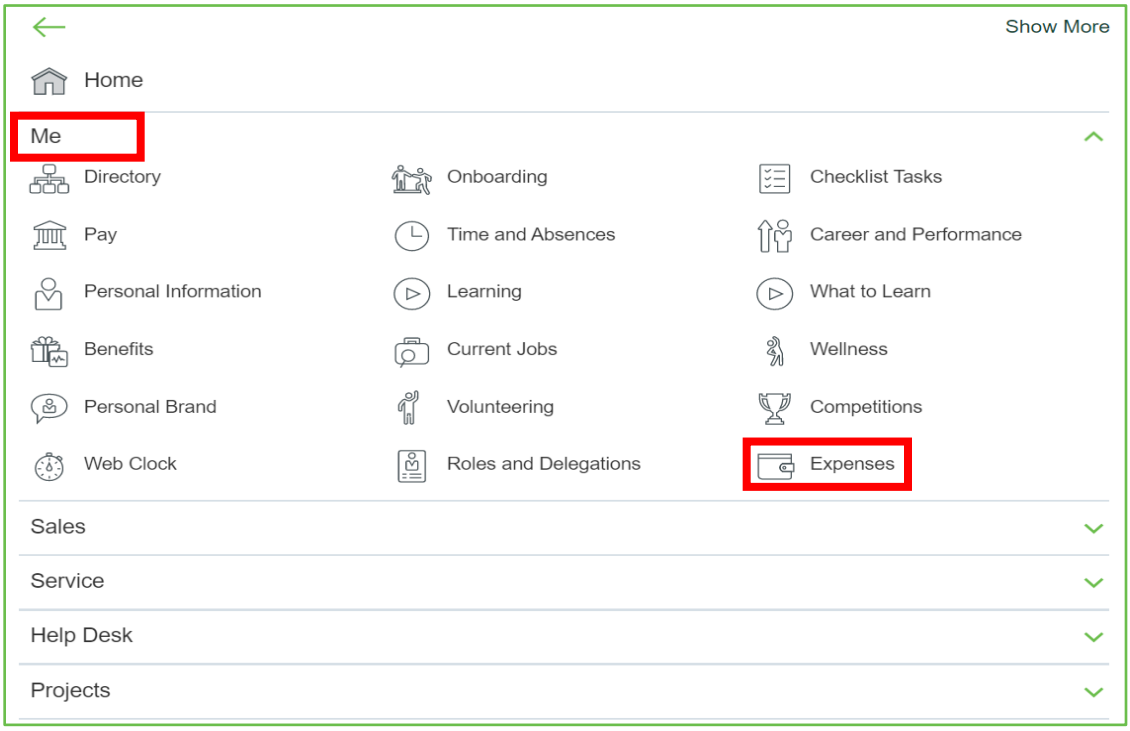
Expenses: Creating & Editing an Authorization Request

1. Navigating to the Self-Service Module

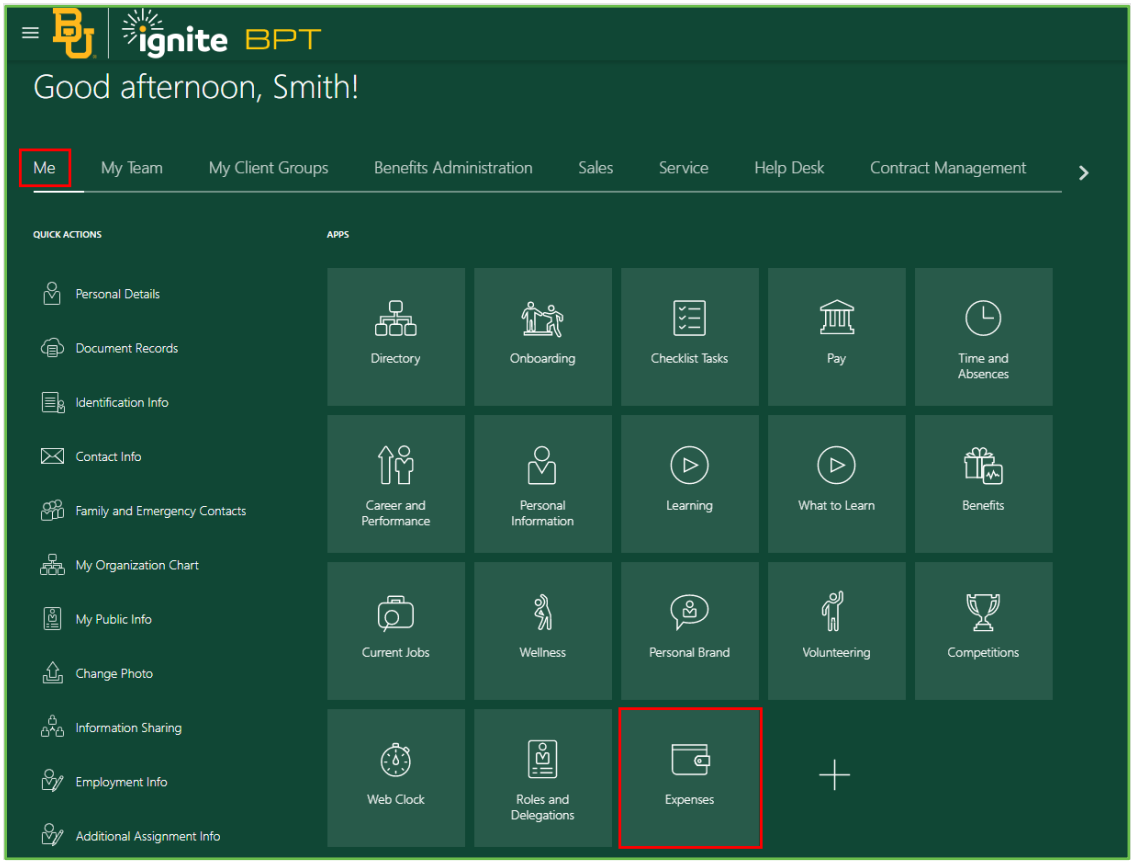
1. You can access the **Expenses** section in two ways:
    a. Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.



    b. (Option 1) Under the **Me** section, click the dropdown arrow, and select **Expenses** from the dropdown list.

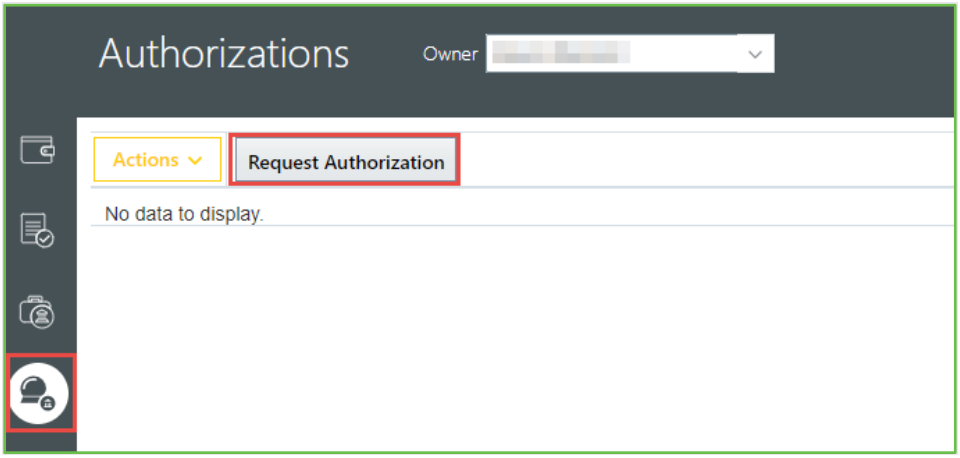


c. (Option 2) Under the **Me** heading on the home page, you can scroll down and click on the **Expenses** tile on the Main Page.

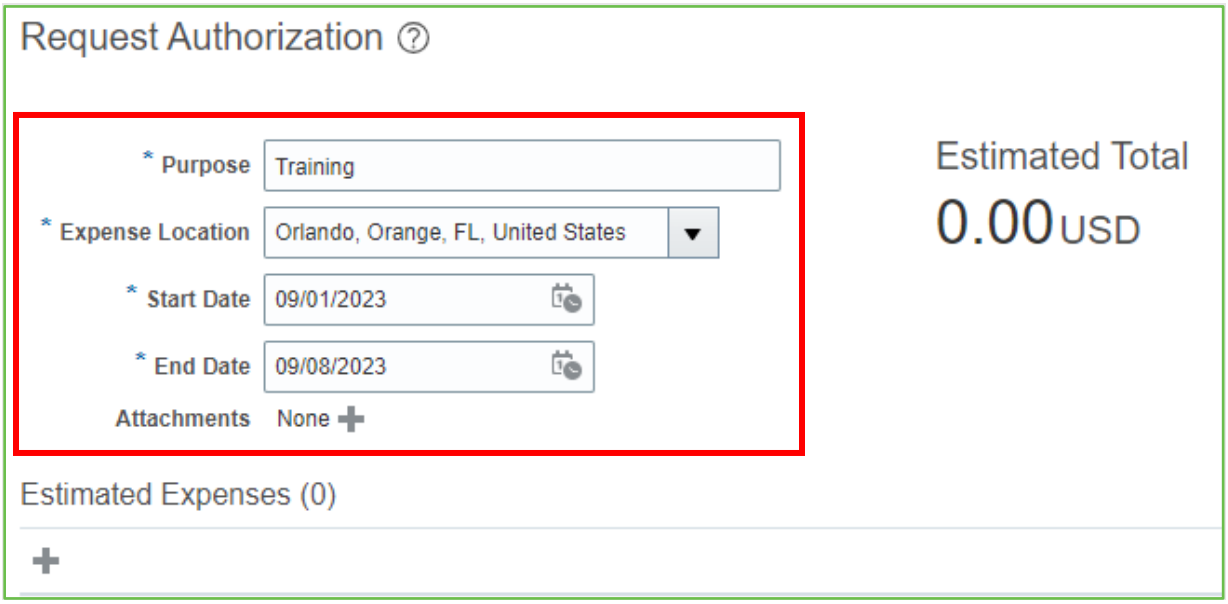


2. Request an Authorization

1. 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**.

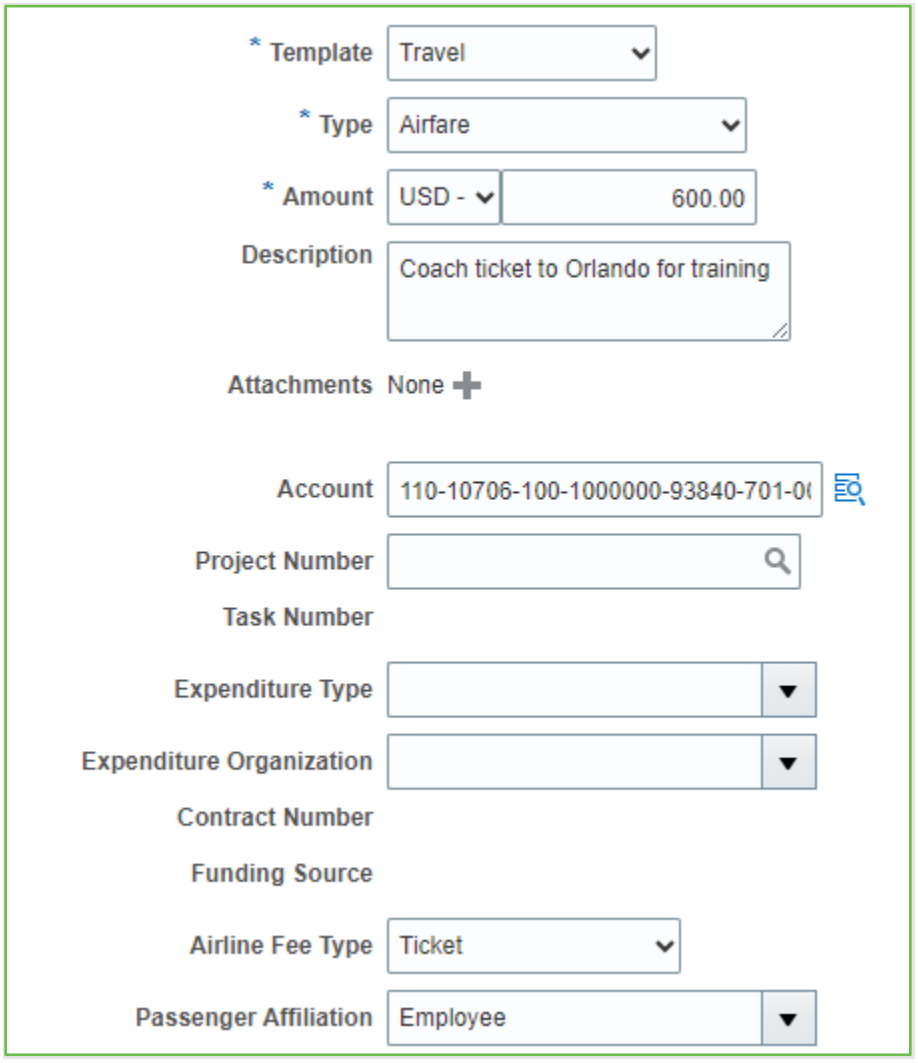


2. Enter the following (* = required field)
    a. ***Purpose** – Enter the purpose of the Authorization Request.
    b. ***Expense Location** – Select the location the anticipated expenses will occur from the dropdown feature, or search by address.
    c. ***Start Date** – Select the date from the calendar.
    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.



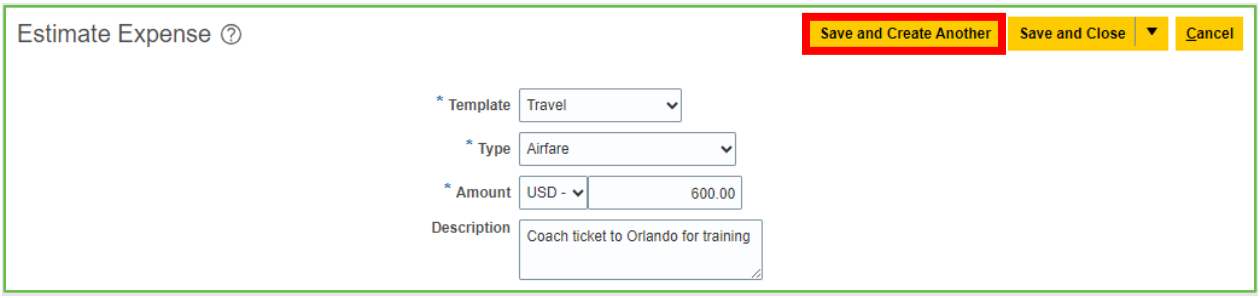
3. Enter the **Estimated Expense Items**. Scroll down to the **Estimated Expenses** section of the window. Click on the Create Item "**+**" icon.

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.



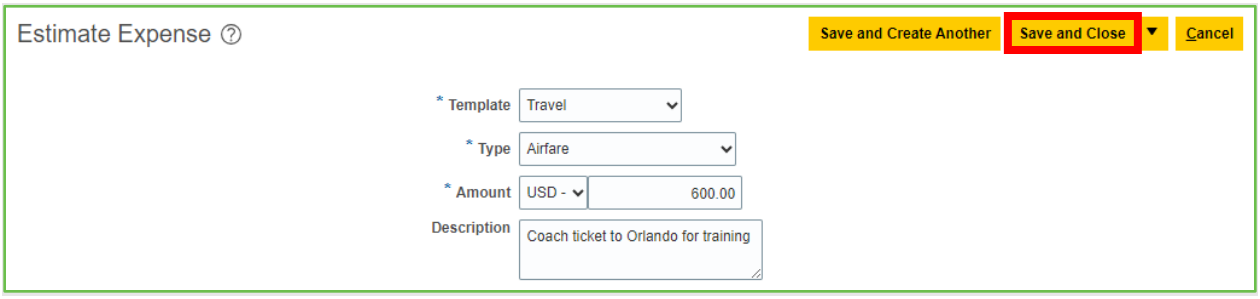
Expenses: Creating & Editing an Authorization Request

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

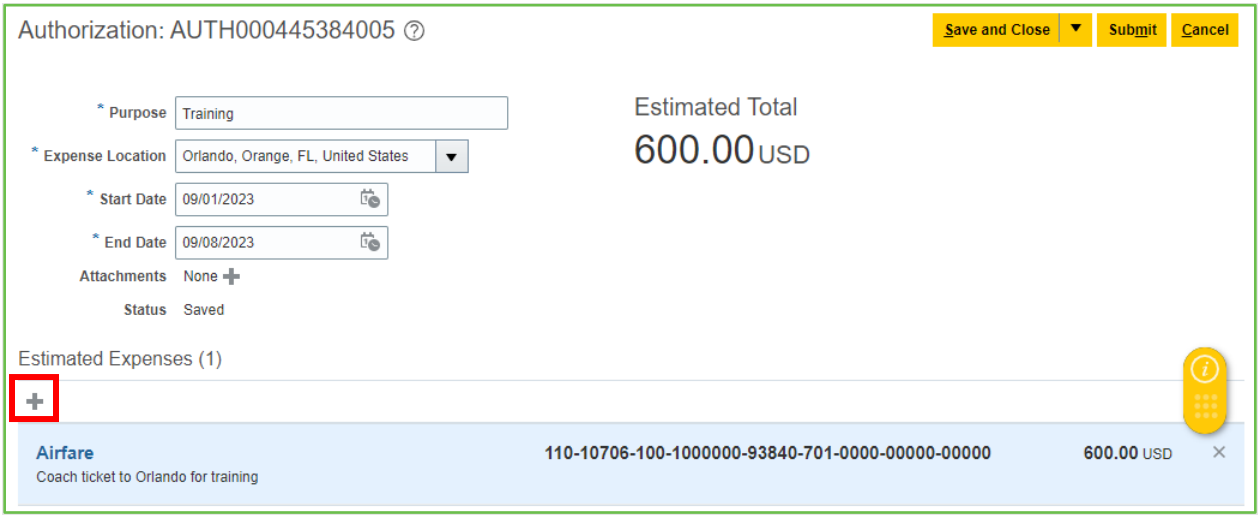


        i. Repeat step 5, entering all required and optional fields.
        ii. Repeat steps until all Estimated Expense Items have been added.
        iii. Click the **"Save and Close"** button in the top right corner.

    b. (Option 2) Click the **"Save and Close"** button in the top right corner.



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



        ii. Repeat step 5, entering the required and optional fields.
        iii. Repeat steps until all **Estimated Expense Items** have been added.

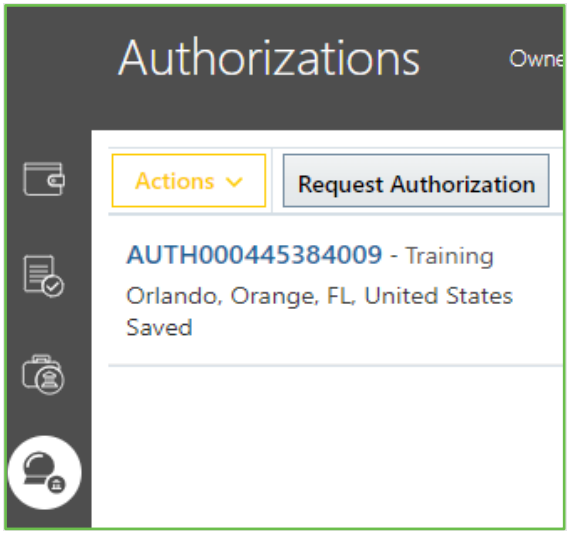
Expenses: Creating & Editing an Authorization Request

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.

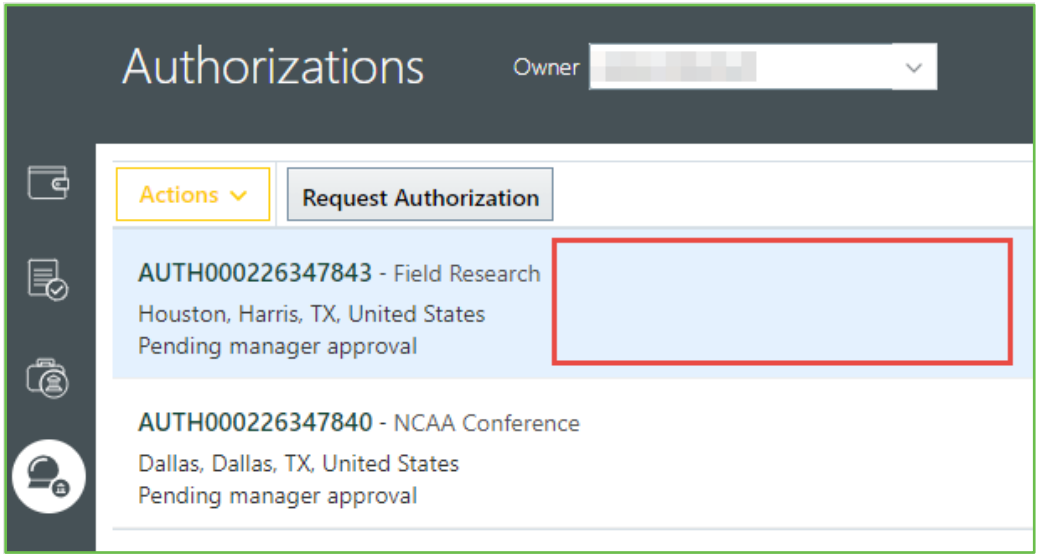


d. Click on the **"Submit"** button in the top right corner of the window. Your report has now been submitted to your line manager for approval.

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

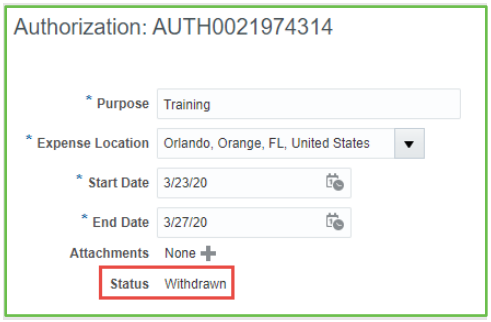
1. Select the report you wish to **WITHDRAW** by clicking on the white part of the line (clicking the request number will open the report), the selected line will be highlighted blue.



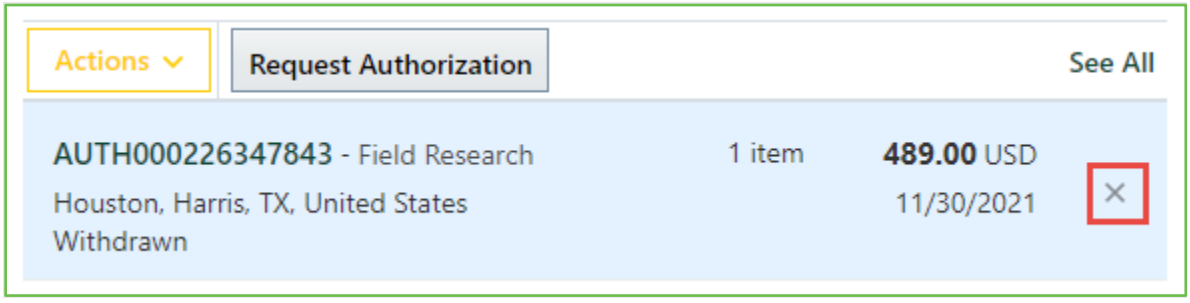
2. Click the **Actions** button, then select **Withdraw.**

Expenses: Creating & Editing an Authorization Request

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.**



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.



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.*