

Creating a Spend Authorization

If a faculty member has asked you to create a spend authorization for approval to use the Faculty Travel Fund, follow these steps. (If you are a faculty member applying on your own, the process is nearly identical.)

1) Start the process

Start the "Create Spend Authorization for Worker" process. (If you're doing this for yourself, search for "Create Spend Authorization" and start that process instead.)

You will be asked to fill in several fields:

For: The name of the faculty member

Company: Brown

Start Date/ End Date: Leave these as autofilled

Description: A one sentence description of the request, e.g. "Attend annual history conference in Toledo."

Business purpose: Generally use "Conference," "Research," or "Other Travel."

Spend Authorization Total: Ignore. This will autofill.

Justification: Provide the dates, location, and purpose of the request in 1-2 sentences. E.g. "Travel and lodging costs to attend AHA annual meeting, where Professor Smith will be moderating a panel. January 8-10, 2023."

2) Click "add," and several more fields will appear.

Expense item: Use this for major expenses (airfare, hotel, per diem). Group small expenses into a single line using per diem, food and provisions, meals, or other general expense items.

Quantity/ Per Unit Amount: This should be self-explanatory.

Total Amount: This will autofill.

Memo: The memo is not required.

Worktags: Delete the existing worktags and replace with the faculty travel fund (CC31412).

3) Add a new line for each major item

Normally you should be able to limit your authorization to no more than four lines - airfare, lodging, conference fees, and other small expenses.

4) Click "submit."

Creating an Expense Report from a Spend Authorization

1.) Does the faculty member have approval to use the Travel Fund?


There are two ways to determine if a faculty member has approval to draw on the Faculty Travel Fund. You can run the report "find spend authorizations for departments," or you can simply start an expense report and enter the faculty member's name.



2) Starting the expense report

If you do your own expense reports, start the "Create expense report for worker" process, type in the faculty member's name, and click the "Create new expense report from spend authorization" option. (This radio button will appear if, and only if, the faculty member has an active spend authorization.)


Next, delete the prefilled worktags and search for "faculty travel fund." Choose the travel fund, and continue with the expense report as you normally do.


Create Expense Report for Worker


Pay To *  Type faculty member's name here.



Creation Options * Create New Expense Report
 Copy Previous Expense Report 
 Create New Expense Report from Spend Authorization  Choose this option.

Memo

Company * 

Expense Report Date * 

Business Purpose 

Worktags * 
  Replace these worktags with the Faculty Travel Fund (CC31412).