

Create Spend Authorization

Employees submit a **Spend Authorization** to request approval for usage of funds related to travel, monthly mileage, supplies, food, and p-card. The **Spend Authorization** must be approved before making purchases. This process replaces the FGCC Order Form.

Prepare the following to complete this report:

Travel:

- Documentation that substantiates the event name, location, date, and estimated expenses (airfare, baggage fees, lodging, registration, taxi/rideshare/Uber, travel mileage, per diem, etc.) A screenshot of those details from a website is sufficient.
- If personal travel is included, documentation of a flight comparison (cost of airfare on business travel days vs personal travel days) is required.

Monthly Mileage:

- Complete the Foundation Mileage Expense Claim form and attach to the spend authorization.
- The form is located on the Foundation website. Do not use the mileage form link in Workday. The linked form is for District employees, not the Foundation employees.

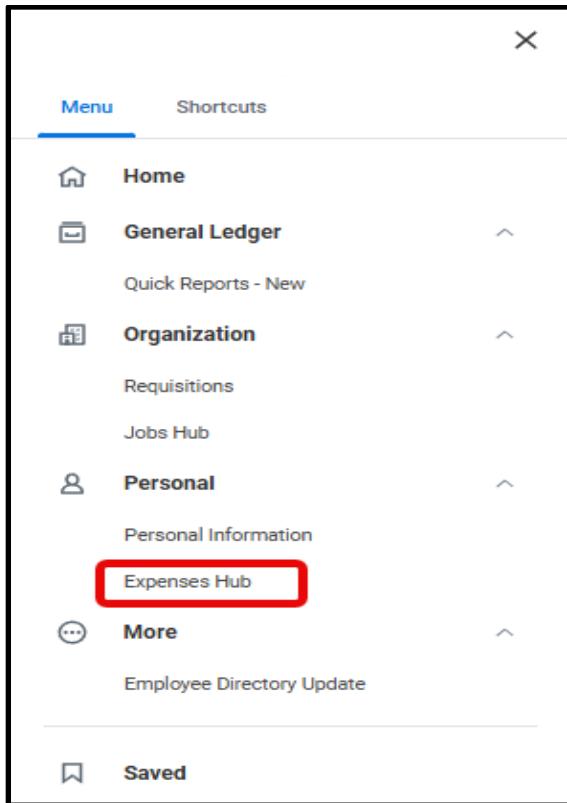
Supplies, Food, P-Card:

- Supplies: quotes or a list of the supplies to be ordered
- Food: quote or list of food items, and agenda or flyer for the meeting, list of attendees if available.
- P-Card: supporting documentation for the item to be purchased

Create a Spend Authorization

1. Select the **Menu** icon at the top left corner, select the Menu tab, scroll down to Personal category, and select **Expenses Hub**.

Alternatively, you may search for Create Spend Authorization in the search bar located in the application header.



1. From the **Overview** section of the **Expenses Hub**, select the **Create Spend Authorization** button.



2. On the **Create Spend Authorization** screen, first review the Instructions sections.
3. Enter the following **Spend Authorization Information**:
 - i. **Company**: This will default to the Foundation for Grossmont & Cuyamaca Colleges.
 - ii. **Start Date**:
 - **Travel**: Enter the date your business travel will begin, excluding personal travel dates.
 - **Monthly Mileage**: Add the first date of the month.
 - **Supplies, P-Card**: Add the current date
 - **Food**: If you are purchasing food for a meeting, add the date of the event.
 - If your travel includes **personal travel dates**, enter the personal travel dates in the Justification field.
 - iii. **End Date**:
 - **Travel**: Enter the date your business travel will end, excluding personal travel dates.
 - **Monthly Mileage**: Add the last date for your monthly travel
 - **Supplies, P-Card**: Add the date you estimate to purchase the item.
 - **Food**: If you purchase food for a meeting, add the meeting date.
 - iv. **Description**: Enter the conference name or event description (ex: CCCAOE Nov 2025 Palm Springs), or monthly mileage reimbursement (ex: November Monthly Mileage Reimbursement), or for supplies the vendor (ex: OPD or Amazon, etc.), or add the restaurant where you will purchase the food (ex: Panera Bread, etc.)
 - v. **Business Purpose**: Select the appropriate **Business Purpose** from the dropdown menu.

▼ Spend Authorization Information

Company	<input type="text" value="The Foundation for Grossmont & Cuyamaca Colleges"/> ...
Start Date	<input type="text" value="11/17/2025"/> ...
End Date	<input type="text" value="11/20/2025"/> ...
Description	<input type="text" value="CCCAOE Nov 2025 Palm Springs"/>
Business Purpose	<input type="text" value="Travel"/> ...

4. Enter the following **Spend Authorization Details**:

i. **Justification for Travel:**

- State a specific business reason for your travel request. Include the business reason why you are requesting to travel.
- Add location of the destination
- Document any **personal travel dates** that are included in your travel plans.

▼ Spend Authorization Details

Justification	<input type="text" value="CCCAOE November 2025 Palm Springs"/> Professional development opportunity
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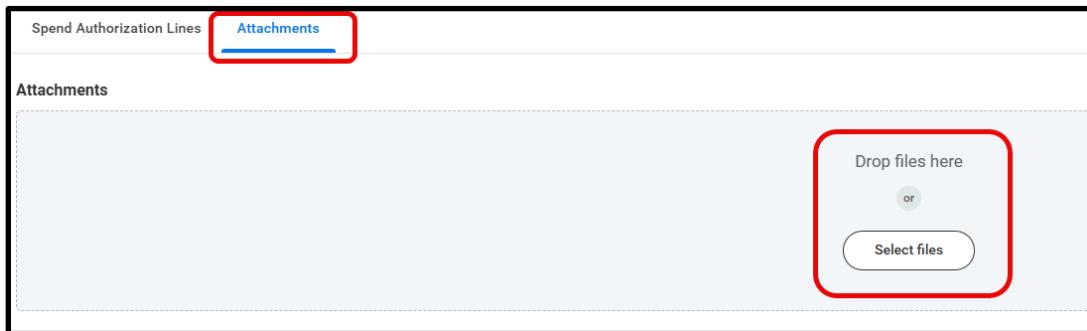
ii. **Justification for monthly mileage:** Travel due to daily operations.

5. Select the **Attachments** tab to upload a document that substantiates request. An error message will display if you attempt to submit your Spend Authorization without an attachment.

Documentation for travel that substantiates the date of event, location, and business details is required. This can be a screenshot of the event website or an email invite which includes required details. Include documentation for the



estimated expenses. Documentation for supplies, food, monthly mileage, or p-card can be a quote or screenshot of the items.

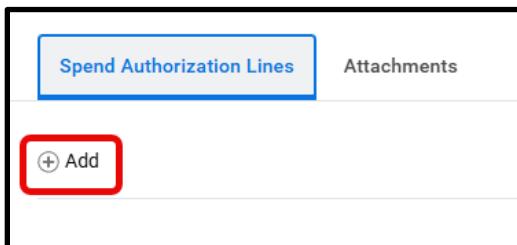


Spend Authorization Lines **Attachments**

Attachments

Drop files here
or
Select files

6. Select the **Spend Authorization Lines** section and select the **Add** button to add a **Spend Authorization Line**.



Spend Authorization Lines **Add**

7. Enter the following information into the required **Spend Authorization Line** fields:

- Expense Item:** Select the applicable **Expense Item**. Unique fields and instructions will populate for the given **Expense Item**. Search by:
 - Entering keyword(s).
 - Selecting from the dropdown menu in **By Expense Item Group**.
 - Searching **By Alphabetical Order**.
- Quantity:** Enter the quantity of items you will be expensing. If the cost is based on one flat amount rather than per unit, enter **1** in this field.
- Per Unit Amount:** Enter the total amount of the expense item.
- Total Amount:** This field will calculate automatically, based on the **Per Unit Amount** and **Quantity**. If a selected Expense Item does not display the Per Unit Amount and Quantity, enter the total amount of the item amount here.
- Budget Date:** This field will default to today's date and should be kept as is.

vi. **Memo:** Enter additional information for the approvers in this field.

Spend Authorization Lines Attachments

[+ Add](#)

5210 Airfare	250.00
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Spend Authorization Line [\[Delete\]](#)

Expense Item	*	<input type="text" value="5210 Airfare"/>	[More]
Quantity	*	<input type="text" value="1"/>	
Per Unit Amount	*	<input type="text" value="250.00"/>	
Total Amount	*	<input type="text" value="250.00"/>	
Budget Date	*	<input type="text" value="11/25/2025"/> [Calendar]	
Memo		<input type="text" value="Southwest"/>	

Spend Authorization Lines Attachments

[+ Add](#)

5210 Lodging	0.00
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Spend Authorization Line [\[Delete\]](#)

Expense Item	*	<input type="text" value="5210 Lodging"/>	[More]
Quantity	*	<input type="text" value="1"/>	
Per Unit Amount	*	<input type="text" value="0.00"/>	
Total Amount	*	<input type="text" value="0.00"/>	
Budget Date	*	<input type="text" value="11/25/2025"/> [Calendar]	
Memo		<input type="text" value="Omni Hotel"/>	

i. **SmartKey:** Add the SmartKey.

Worktags	
*SmartKey	<input type="text" value="D2105U0 General Aux Operations"/> [More]
*Fund	<input type="text" value="D1 Auxiliary"/> [More]
*Cost Center	<input type="text" value="CST_D001 Operations"/> [More]
*Program	<input type="text" value="D10001 AUX OPS"/> [More]
*Business Unit	<input type="text" value="6 Auxiliary Oversight"/> [More]
Additional Worktags	<input type="text" value="Zip: 00000 - N/A"/> [More]

ii. **Worktags:** This will auto-populate when you add a smartkey. Fund, Cost Center, Program, Business Unit, Additional Worktags.

- Do not change any of these worktags.
- Worktag fields allow you to associate your Spend Authorization with specific financial designations. Costs will be encumbered against the department budget as a Commitment.

iii. **Item Details:** This section will appear if the **Expense Item** selected requires additional information. All fields under the **Item Details** section must be completed.

iv. **Add a line for each expenses:** Registration fees, lodging, airfare, travel mileage, other transportation (Uber, Lyft, trolley, subway, bus, train, taxi, ferry, etc.), per diem.

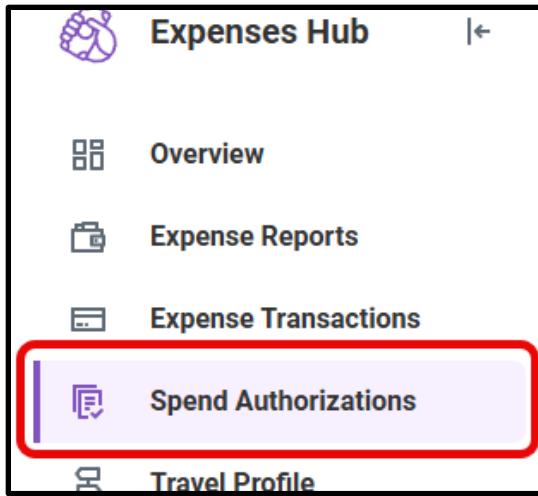
Spend Authorization Lines		Attachments
<div style="border: 1px solid #ccc; padding: 5px; display: flex; align-items: center;"> + Add 5210 Airfare 300.00 Spend Authorization Line Delete </div>		
Expense Item * 5210 Airfare		

2. You may **Save for Later** or **Cancel** at any time. When complete, select the **Submit** button.

Note: An error message will appear if the report is missing the Attachment on the first page or if missing other required information. Your report will still save to your Expenses Hub.

Edit, Change or Cancel a Spend Authorization

1. Navigate to the **Spend Authorizations** section of the **Expenses Hub** to view all your Spend Authorizations. You may also type in the search field **My Spend Authorizations** and search by your name or date.



2. You may make certain changes to a **Spend Authorization** via the **Actions** menu.
- Status: **In Progress**. You may Cancel or Change the Spend Authorization. Select the **Actions** dropdown menu, then proceed with desired action.

Spend Authorization	Actions	Start Date	End Date	Spend Authorization Status	Description
FD-SA000005	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> Actions ▼ </div>	08/22/2025	08/25/2025	In Progress	Conference 2025
FD-SA000006	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> Actions ▼ </div>	08/08/2025	08/08/2025	Draft	

- Status: Draft. You may Cancel or Edit the Spend Authorization. Select the **Actions** dropdown menu, then proceed with desired action.

FD-SA000006	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> Actions ▼ </div>	08/08/2025	08/08/2025	Draft	
	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> Cancel Spend Authorization </div>				

3. Update the Spend Authorization as needed.
4. Select the **Submit** or **Save for Later** button.
5. You may confirm that your Spend Authorization has been approved by checking the Spend Authorization Status located on the Expenses Hub, under My Spend Authorizations.

Spend Authorization	Actions	Start Date	End Date	Spend Authorization Status
FD-SA000005	Actions ▾	08/22/2025	08/25/2025	Approved

Approved Spend Authorization and PDF

1. **Travel:** The approved Spend Authorization must be attached to the Expense Report. After your travel has occurred, you will be reimbursed for your out of pocket expenses, per diem, and travel mileage, if any.
2. **Monthly Mileage:** The approved Spend Authorization must be attached to the Expense Report for your monthly mileage reimbursement.
3. **Supplies** (Foundation Business Accounts: ODP and Amazon): Save a PDF in your file. The Buyer will keep a copy of the approved Spend Authorization.
4. **P-Card:** The approved Spend Authorization must be attached to the P-Card receipt when reconciling your monthly statement.
5. **PDF:** Under the Spend Authorization you will see a blue link. Click on the blue link and PDF the document.

Have Questions?

For assistance with non-technical issues related to Spend Authorizations, please contact your sourcing buyer:

- Heba Almasraf, for all other grants not mentioned below and F smartkeys. Heba.almasraf@gcccd.edu
- Mayra Chavez, for K16 Collaborative Grant. Mayra.chavez@gcccd.edu
- Sue Fisher, for Regional Strong Workforce Program, K12 Strong Workforce Program, Regional Collaboration and Coordination Grants, K14 TAP and Pathway Coordinator Grant, Irvine Apprenticeship Grant. Sue.fisher@gcccd.edu