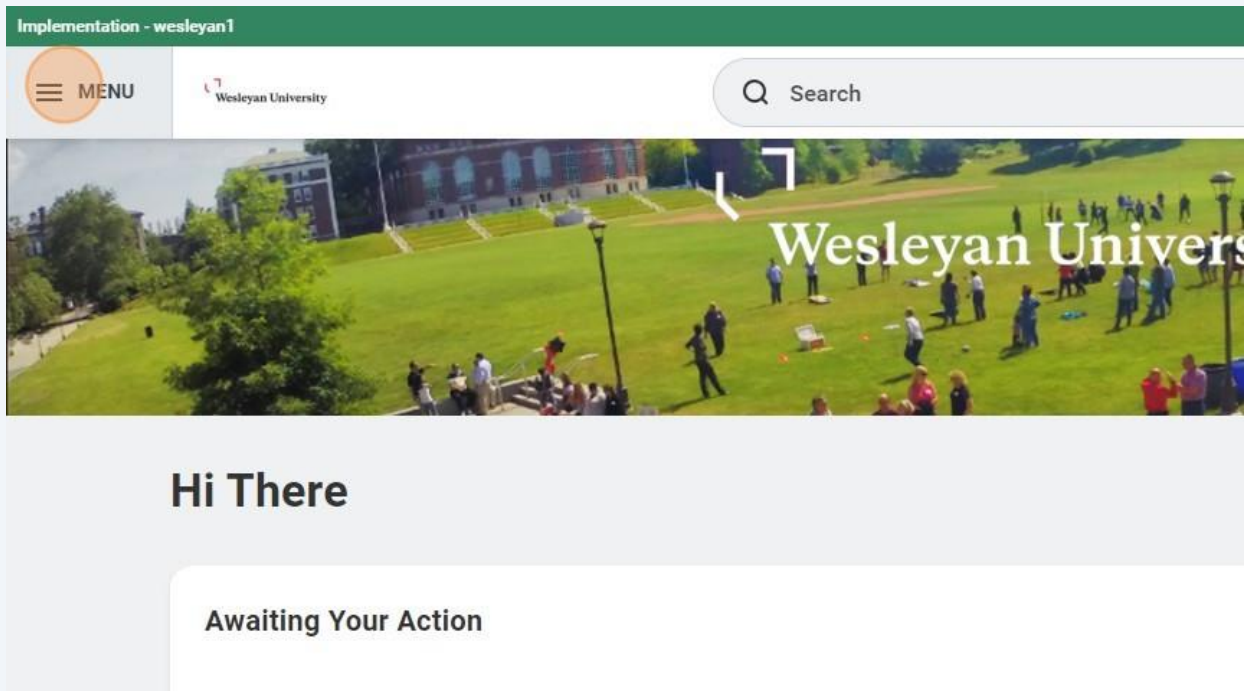
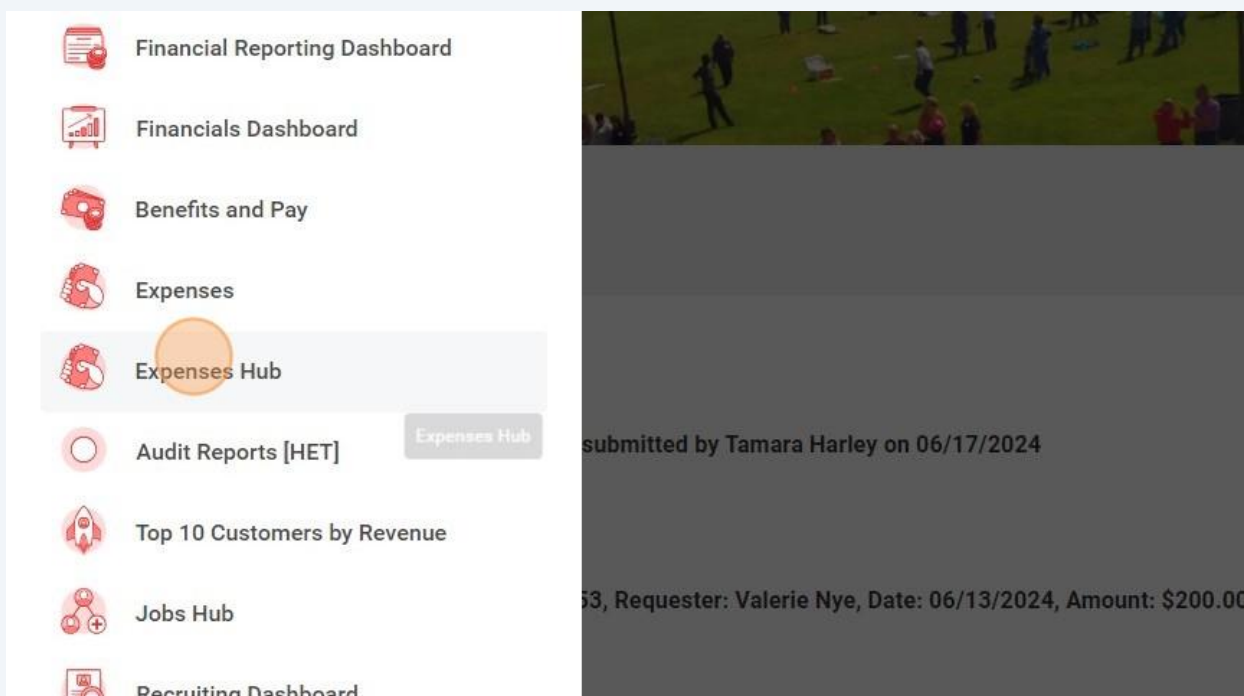


Request a Cash Advance

1 Navigate to the Menu



2 Click "Expenses Hub"



3 Click "Create Spend Authorization"

The screenshot shows the WU Wesleyan University portal. At the top, there is a search bar. Below it, a sidebar on the left contains navigation links: 'ub', 'ts', 'actions', 'zations', and 's'. The main content area is titled 'Tasks' and features two buttons: 'Create Expense Report' and 'Create Spend Authorization'. The 'Create Spend Authorization' button is highlighted with an orange circle. Below the 'Tasks' section, there is a 'Needs attention' section with two cards. The first card, 'Expense Reports To Submit', shows a draft report for '06/13/2024 - ER-000000133 test' with a total of \$0.00. The second card, 'Transactions To Expense', shows a quick expense of \$15.00 for '06/13/2024'.

4 Type a description

The screenshot shows the 'Spend Authorization Information' form. The form has several fields: 'Company' (WU Wesleyan University), 'Start Date' (06/17/2024), 'End Date' (06/17/2024), 'Description' (highlighted with an orange circle), 'Business Purpose', 'Spend Authorization Total' (0.00), and 'Currency' (USD). The 'Description' field is the focus of this step. To the right of the form, there are sections for 'Reimbursement' and 'Justification'.

5 Complete a valid business purpose.

▼ Spend Authorization Information

Company

*

✕ WU Wesleyan University ...

:

☰

Start Date

*

06/17/2024

📅

End Date

*

06/17/2024

📅

Description

*

Cash Advance

Business Purpose

:

☰

Spend Authorization Total

*

0.00

Currency

USD

Spend Authorization Lines

Attachments

Reimbursement

Justification

6 Click the "Spend Authorization Total" field.

▼ Spend Authorization Information

Company

*

✕ WU Wesleyan University ...

:

☰

Start Date

*

06/17/2024

📅

End Date

*

06/17/2024

📅

Description

*

Cash Advance

Business Purpose

✕ Research ...

:

☰

Spend Authorization Total

*

0.00

Currency

USD

Spend Authorization Lines

Attachments

Reimbursement

Justification

Submit

Save for Later

Cancel

7 Click "Add" to add lines

Description	*	Cash Advance
Business Purpose		<div><div>× Research ...</div><div>⋮</div></div>
Spend Authorization Total	*	500.00
Currency		USD

Spend Authorization Lines

Attachments

⊕ Add

Submit

Save for Later

Cancel

8 Click the "Expense Item" field and add the applicable items for the advance

thorization Lines

Attachments

0.00

Spend Authorization Line

⋮

Expense Item	*	<div>Search</div> <div>⋮</div>
Quantity	*	1
Per Unit Amount	*	0.00
Total Amount	*	0.00
Budget Date	*	06/17/2024 <div>📅</div>
Memo		

9 Click "Travel Meals"

0.00	Spend Authorization Line	
Expense Item	* Meal	
	Search Results (4)	
	<input checked="" type="radio"/> Business Meals	
	<input type="radio"/> Travel Meals ...	
	<input type="radio"/> Alcohol	
	<input type="radio"/> Catering	
Quantity	*	
Per Unit Amount	*	
Total Amount	*	
Budget Date	* 06/17/2024	
Memo		
Cash Advance Requested	<input type="checkbox"/>	

10 Enter a "Total Amount".

0.00	Spend Authorization Line		
Expense Item	* Search	Instructional Text	
	<input type="text" value="X Travel Meals ..."/>		
Quantity	1	Maximum daily meal all tic travel.	
Per Unit Amount	0.00	Item Details	
Total Amount	* 0.00	Attendee(s)	<input type="text" value="X Val"/>
Budget Date	* 06/17/2024	Country	<input type="text"/>
Memo			
Cash Advance Requested	<input type="checkbox"/>		
Worktags			
Gift	<input type="text" value=""/>		

11 Check the "Cash Advance Requested" Checkbox

Per Unit Amount 500.00

Total Amount * 500.00

Budget Date * 06/17/2024

Memo

Cash Advance Requested ☐

Worktags

Gift

Grant

Project Task

*Cost Center

× CC1029 Office of Finance and Administration

Maximum daily travel.

Item Details

Attendee(s)

Country

12

Different details will be required depending on the expense item chosen. In this case, "Country" is required for meals due to the differences in maximum amounts depending on domestic vs. foreign travel.

Level Meals ...	Instructional Text
	Maximum daily meal allowance is \$100 for international travel and \$75 for domestic travel.
	Item Details
	Attendee(s) X Valerie Nye ...
/2024	Country

13

Click "Travel Classification (CWT-01)"

Grant	
Project Task	
*Cost Center	X CC1029 Office of Finance and Administration ...
Designation	
Designee	My Worktags > Travel Classification (CWT-01) > Search
*Travel Classification (CWT-01)	
Transaction Detail (CWT-05)	
*Additional Worktags	X Fund: FD100 Unrestricted Operating ... X Program: PG500 ...

Error:
A value is required for: Travel Classification (CWT-01)

- 14** You can add an attachment if it makes it provides more context for the approver but it is not required. Click "Submit"

	and Administration
Designation	
Designee	
*Travel Classification (CWT-01)	x TR0002 Travel Foreign ...
Transaction Detail (CWT-05)	
*Additional Worktags	x Fund: FD100 Unrestricted Operating ... x Program: PG500 Institutional Support ...

Submit

Save for Later

Cancel