

How to Include a Fleet or Rental Vehicle in a Spend Authorization for Travel

Important Notes:


- **Only 12-passenger vans are now available in the BSU Fleet.**
- **All other non-personal vehicles must be rented from Enterprise Rental, located at the Bemidji Airport.**
 - Call Enterprise Rental: 218-759-9960.
 - Provide Name of University, Driver's Name, Program/School Name and the Contract #Y50456.
 - Visit <https://www.bemidjistate.edu/offices/business-services/general-travel-information/car-usage-and-rentals/> for more information and to reference the Vehicle Comparison Chart.
- **Drivers must have a current Vehicle Use Agreement Form on file.**
 - <https://forms.office.com/Pages/ResponsePage.aspx?id=xscRULQKq0ae9PrnSplaf4rukblVO6pNnRawyjL-rLpUQURNNzBKV1owRzI3QjFTMk1LVEpTQVdNQy4u>
 - Applies to personal vehicles, BSU Fleet vehicles, and Enterprise Rental vehicles.
- **Employees may only list a single vehicle on a Spend Authorization.**
 - The Driver of the Vehicle must have a Spend Authorization submitted/approved in their name.
 - Each Driver must submit a Spend Authorization with an Item Line for a “Car Rental”
 - Multiple vehicles needed for the same trip must be requested on multiple Spend Authorizations: One Auth per Driver.
- **Students are not yet integrated into Workday and therefore must complete/submit the old Student Travel Request PDF found at:**
 - <https://www.bemidjistate.edu/offices/business-services/general-travel-information/>
 - Designate on this request form that a FLEET or ENTERPRISE vehicle is needed if the student requester is the Driver of that vehicle.
 - Route Student – Advisor/Chair – Dean – Vice President – President (*for international travel*).
 - Use DeansSuiteForms@bemidjistate.edu and VPSignatures@bemidjistate.edu to route the form.

Helpful Tips Before You Begin:

- Create a PDF of a map showing the distance between Work Base Location and destination.
- Create a PDF of your justification evidence (acceptance of presentation, emailed invite, flyer, printout of conference homepage or agenda, etc.)
- Create a PDF Roster of all persons traveling in the vehicle and/or going on the trip.
- Create a PDF of your Chair’s Approval to Spend IFO-19B funds. (if spending IFO 19B Funds)
 - Use Form: <https://www.bemidjistate.edu/academics/affairs/faculty-resources/>
 - Create a PDF of any other necessary documents such as PIG letters, Sabbatical letters, etc.

How to Include a Fleet or Rental Vehicle in a Spend Authorization for Travel

1. CREATE a Spend Authorization to travel and add Fleet info or Rental info as a Line

- Add a Spend Authorization Line 
 - In Expense Item field choose:
 - Car Rental – Instate
 - Car Rental – Outstate
 - In Quantity field:
 - Enter “1”
 - You, as an individual, may only request a single vehicle.
 - Per Unit Amount:
 - Enter the estimate of the total cost of the rental from either BSU Fleet or Enterprise
 - BSU 12-Pass Van Charge = \$0.50/mile
 - Enterprise Charges
 - Drivers must purchase fuel for Enterprise Rentals and then request reimbursement for the cost of the fuel receipts.
 - You will need to enter a Mileage line item to cover the fuel expense for an Enterprise Rental
 - Budget Date (Date of Departure/Travel)
 - Memo:
 - Write either FLEET or ENTERPRISE as the first word.
 - Write the Type of Vehicle: 12-Pass Van, economy, minivan, suburban, etc.
 - Write DRIVER: and then list the driver’s name.
 - Write PASS and then list the name or N/A
 - ATTACH a pdf of a roster of names of all people going on the trip if there are more than two people in the vehicle.
 - Examples:
 - FLEET 12-PassVan (1) DRIVER: Sabrina Wille. PASS: see attached roster
 - ENTERPRISE: (1) compact/economy. DRIVER: Sabrina Wille. PASS: N/A

2. Save a PDF of the SPEND AUTHORIZATION

- Name the PDF using this format:
 - TYPE OF RENTAL_ Last Name_ Departure Date in YYYY.MM.DD
 - Examples:
 - FLEET_ Wille _2024-01-31
 - ENTERPRISE_ Wille _2024-01-31


3. EMAIL a pdf copy of your SPEND AUTHORIZATION to Laurie Watkins and Jane White

- Name the Subject of the email using this format:
 - TYPE OF RENTAL_ Last Name_ Departure Date in YYYY.MM.DD
 - Examples
 - FLEET_ Wille _2024-01-31
 - ENTERPRISE_ Wille _2024-01-31

Example of a Spend Authorization including request for a Fleet 12-passenger van is shown on next page.


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AUTH-000000186

For: Sabrina Lea Wille
 Status: Approved 

Spend Authorization Total
116.00




Spend Authorization Information

Position 00204310 Office & Admin Special Prin - Sabrina Lea Wille
 Company CU0070 Bemidji State University
 Start Date 09/17/2024
 End Date 09/17/2024
 Description Travel_FLEET_Roseau MN 
 Business Purpose In State
 Currency USD

Spend Authorization Details

Justification Transporting engineering students to Polaris plant tour
 Expense Report(s)



Spend Authorization Lines

Expense Item	Car Rental - Instate 
Quantity	1 
Per Unit Amount	116.00
Total Amount	116.00
Budget Date	09/17/2024
Memo	FLEET 12-PassVan. DRIVER: Sabrina Wille. PASS: see attached roster. 



Worktags

Program PG0043258 BESU VP Academic Affairs 215005
 Grant
 Project
 *Additional Worktags Cost Center: CC0003079 BESU - VP Acad Aff
 Function: FN610 Institution Support - Executive Management
 Fund: FD0039 General Operations

Passenger Roster.pdf

 File Name Passenger Roster.pdf
 Content Type application/pdf
 Updated By Sabrina Lea Wille
 Upload Date 07/11/2024 03:14:00 PM
 Comment DRIVER: Sabrina Wille. (9) Passengers 

Map.pdf

 File Name Map.pdf
 Content Type application/pdf
 Updated By Sabrina Lea Wille
 Upload Date 07/11/2024 03:14:00 PM
 Comment BSU to Roseau, MN 

[Attachment Section](#)

Note: Additional attachments may be necessary or required depending on the nature of the request.

Balances

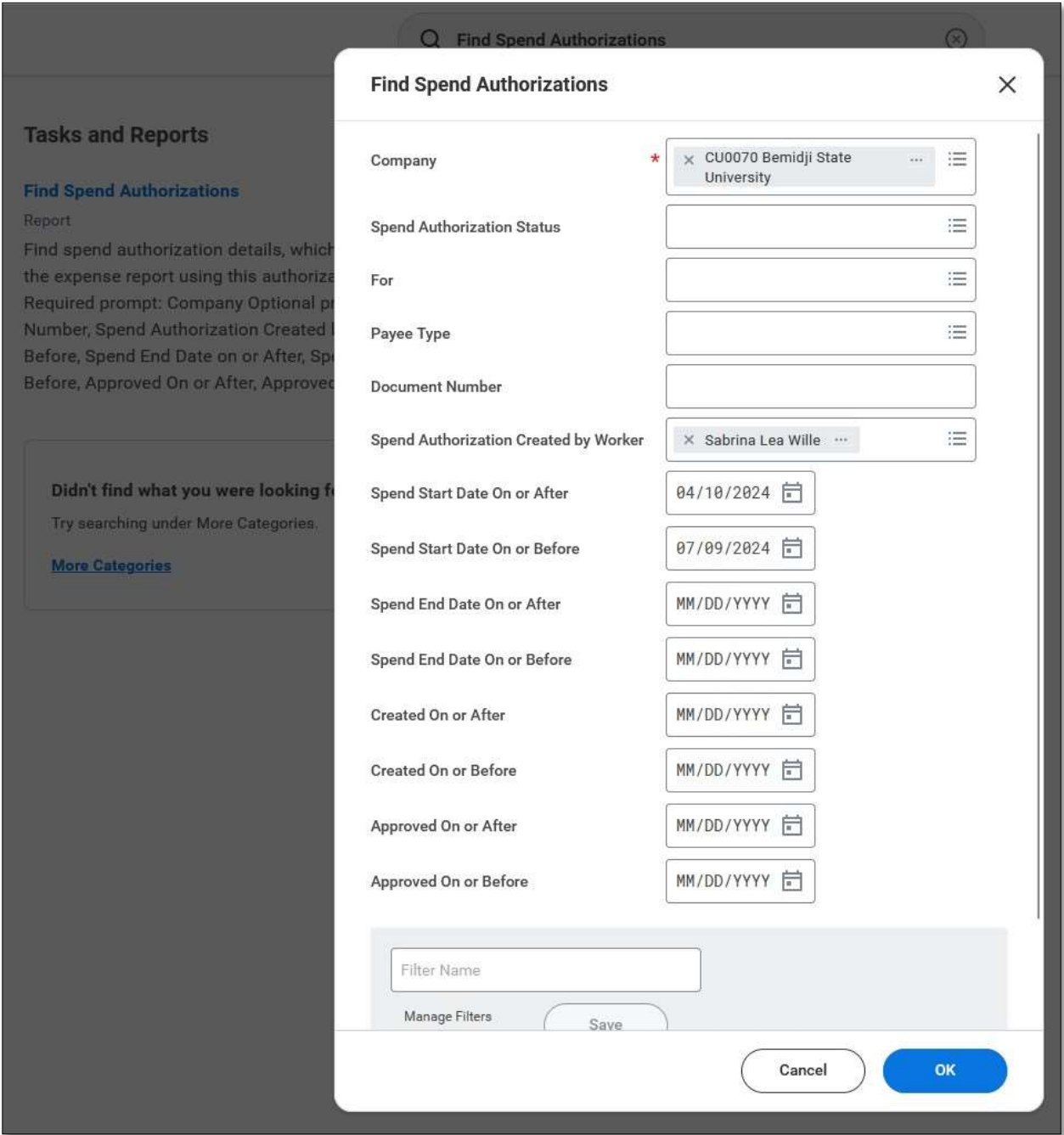
Expense Item	Commitment Amount	Commitment Amount Liquidated	Commitment Amount Remaining	Currency
Car Rental - Instate	116.00	0.00	0.00	USD
Total:	116.00	0.00	0.00	

Directions on how to find a Spend Authorization and print it to PDF format are found on the following pages.

How to Include a Fleet or Rental Vehicle in a Spend Authorization for Travel

❖ There are several ways to FIND your Spend Authorizations to create a PDF:

1. Add the My Spend app and then click on it.
2. Type My Spend into the search bar
 - Click on My Spend Authorizations
3. Enter FIND SPEND AUTHORIZATIONS in the search bar
 - In the FIND SPEND AUTHORIZATIONS pop up box
 - Enter CU0070 Bemidji State University as COMPANY
 - Enter the person you are looking for in the FOR field or enter the appropriate name in the SPEND AUTH CREATED BY WORKER field.
 - Click OK
 - A list of Spend Authorizations will appear



How to Include a Fleet or Rental Vehicle in a Spend Authorization for Travel

❖ To VIEW the SPEND AUTHORIZATION of your choice

- Click on the tiny magnifying glass icon on the far left of the list
 - An individual SPEND AUTHORIZATION will appear

Spend Authorization	Spend Authorization Number	Description	For	Payee Type	Company	Spend Start Date	Spend End Date
	AUTH-000000017	Travel_M24 MNState ASA Conference	Employee: Allen J. Bedford	Employee	CU0070 Bemidji State University	06/25/2024	06/27/2024
	AUTH-000000026	Travel to Polaris plant in Roseau, MN	Employee: Allen J. Bedford	Employee	CU0070 Bemidji State University	07/05/2024	07/05/2024

❖ To CREATE a PDF of your SPEND AUTHORIZATION

- Click on the PDF symbol in the far right upper corner
- Download the PDF
- Save a copy of the Spend Authorization using the following file naming format
 - Last, First_FLEET or RENTAL_YYYY-MM-DD_Destination

For Sabrina Lea Wille Spend Authorization Total 116.00 USD

Status Draft

▼ Spend Authorization Information

Position 00204310 Office & Admin Special Prin - Sabrina Lea Wille

Company CU0070 Bemidji State University

Start Date 07/09/2024

End Date 07/09/2024

Description TEST for Fleet Vehicle Request

Business Purpose In State

Currency USD

▼ Spend Authorization Details

Justification TEST: BSU FLEET MINIVAN REQUESTED: Transporting several administrators to local event (fictitious scenario)

Expense Report(s) (empty)

Spend Authorization Lines Attachments Balances