

How to Add and Format the Line Item for a BSU Rental or Enterprise Rental Vehicle in a Travel-Related Workday Spend Authorization

- **Only 12-passenger vans are now available through BSU Rental.**
- **All other non-personal vehicles must be rented through Enterprise, located at the Bemidji Airport.**
 - Call Enterprise Rental: 218-759-9960.
 - Provide Name of University, Driver's Name, Program/School Name.
 - 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 Rental vehicles, and Enterprise Rental vehicles.
- **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 BSU RENTAL or ENTERPRISE RENTAL 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.
 - Employees may request the necessary vehicles in the Spend Auth even if a student driver has not yet been identified.
 - Clearly state how many vehicles are needed for the trip.
 - Clearly state employee drivers' names.
 - List STUDENT DRIVER: TBD if you don't yet know the name.
 - Complete Driver and Passenger Roster information MUST be emailed to Laurie Watkins and Jane White prior to the date of travel.
 - Academic Instructors & Athletic Coaches may submit a single spend auth for season travel which supplies all travel dates and a complete class/team roster as attachments at the beginning of a semester/season. However, a roster of actual drivers/passengers must be emailed to Laurie Watkins & Jane White prior to each team departure.

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 *approved* IFO-19B Funds form or IFO-19A / Internal Faculty Grants form.
 - Forms found here: <https://www.bemidjistate.edu/academics/affairs/faculty-resources/>
- Use Key Words in the Spend Authorization Description Field
 - Key Words help all staff quickly find, sort, and address requests.
 - Key Words: TRAVEL, RENTAL-BSU, RENTAL ENTERPRISE, P-CARD, etc.

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1. Create a Spend Authorization

- In the Description Field use the appropriate Key Words:
 - **TRAVEL** (any Auth using a Rental Vehicle will also be a Travel-related Auth)
 - **RENTAL-BSU** (if using a 12-passenger van)
 - **NUMBER of VEHICLES** (1) (2) (3)
 - **CITY, ST or COUNTRY** (Destination)
 - **P-CARD** (if some travel related purchases will be put on a purchasing card)
 - Example: TRAVEL_RENTAL-ENTERPRISE (2)_CANADA, Winnipeg_P-CARD

2. Use the **+** Spend Authorization Line to make the mode of transportation the first Line

- Add a Spend Authorization Line **+**
 - In Expense Item field choose:
 - Car Rental – Instate
 - Car Rental – Outstate
 - In Quantity field:
 - Enter the number of vehicles you are arranging for this trip.
 - You may enter a separate Spend Auth Line for each vehicle if you need more than one.
 - This is NECESSARY if you are renting vehicles from both BSU and Enterprise for a single trip
 - This could be useful if you are entering two different types of vehicles with different pricing.
 - Per Unit Amount:
 - Enter the estimate of the *total cost* of the rental from BSU Rental or Enterprise Rental
 - BSU 12-Passenger Van (add the amounts below for total)
 - Rental Fee: Use the Distance/Pricing Chart
 - Mileage 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 estimated fuel expense for an Enterprise Rental
 - Budget Date (Date of Departure/Travel)
 - Memo:
 - Write either RENTAL-BSU or RENTAL-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:
 - RENTAL-BSU 12-PassVan (2) DRIVERS: Sabrina Wille. PASS: see attached roster
 - RENTAL-ENTERPRISE: (1) compact car. DRIVER: Sabrina Wille. PASS: N/A

3. Laurie Watkins and Jane White can see all Spend Authorizations. No need to email them.

- **Spend Authorizations must be fully approved before staff may assist with vehicles or P-Card purchase.**

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Example of a travel-related Spend Auth that correctly requests the use of a BSU Rental 12-passenger van.

AUTH-000000186
 For: Sabrina Lea Wille
 Status: Approved ←

Spend Authorization Total
151.00

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_RENTAL-BSU_(1)_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 151.00
 Total Amount 151.00
 Budget Date 09/17/2024
 Memo RENTAL-BSU:12-PassVan (1) 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. Passengers (9) ←

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 depending on the purpose of the request.

Balances

Expense Item	Commitment Amount	Commitment Amount Liquidated	Commitment Amount Remaining	Currency
Car Rental - Instate	151.00	0.00	0.00	USD
Total:	151.00	0.00	0.00	