

Spend Authorization and Expense Reporting: Request a Spend Authorization on Behalf of an Individual Finance

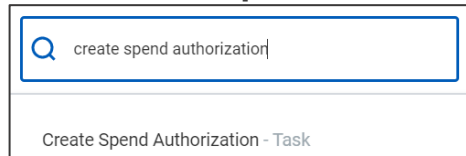
This job aid supports employees who may need to request a Spend Authorization for an individual prior to an expense related event. This can be for both a travel and non-travel expense event.

To request a Spend Authorization, complete the following steps:

REQUEST A SPEND AUTHORIZATION

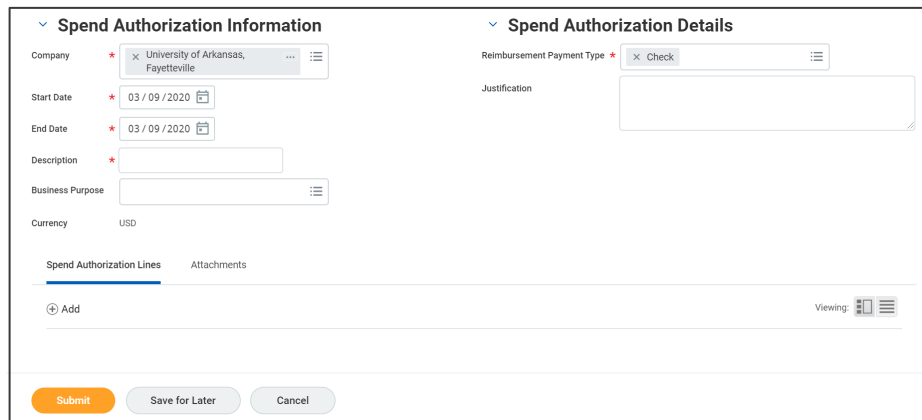
From the Workday homepage:

1. Search 'Create Spend Authorization for Worker' and select the task.



The *Create Spend Authorization* screen is displayed.

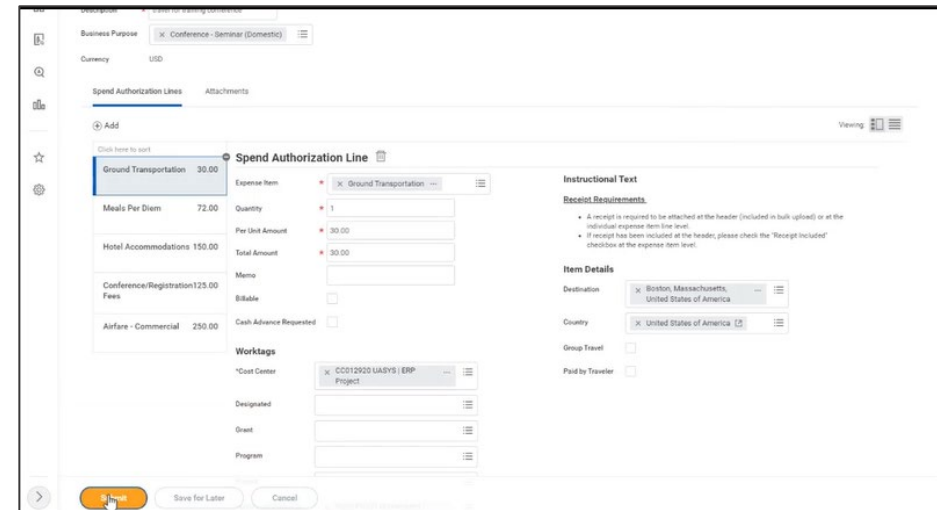
2. Enter the name of the employee in the **For** field. Complete the required fields for the spend authorization, including the **Business Purpose**.



3. Add the **Spend Authorization Lines**. This is where items will be added such as anticipated travel expenses for airfare, ground transportation, lodging. For a non-travel expense, items such as mobile phones, professional memberships, or office supplies.

You can add multiple lines to one spend authorization.

4. Click **Submit**.



NEXT STEPS

The process for requesting a spend authorization is complete.

By clicking **Details and Process**, you can view the actions taken thus far in the process. Any changes made to the spend authorization are tracked in the **Process History** table.

An approver receives a Workday Inbox task to approve, deny, or send back the change to the spend authorization. An approver must provide a reason, if the Send Back action is used.