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

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**.

✓ Sper	nd Authorization Info	mation	 Spend Authorization Details 	
Company	* X University of Arkansas, Fayetteville	-	Reimbursement Payment Type * X Check	:=
Start Date	* 03/09/2020 💼		Justification	
End Date	* 03/09/2020 💼			li di
Description	*			
Business Purpo	ose	:=		
Currency	USD			
Spend Aut	horization Lines Attachments			
(+) Add				Viewing:
Submit	Save for Later	Cancel		

 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.

puerress rurpose X Conference -	seminar (pomestic)						
Currency USD							
Spend Authorization Lines At	tachments						
⊕ Add						Viewing	
Click here to sort	Spend Authoriz	ation Line 🗐					
Ground transportation 30.0	Expense Item	X Ground Transportation …	=	Instructional 1	fext		
Meals Per Diem 72.0	0 Quantity	* 1		Receipt Require	Requirements.		
	Per Unit Amount	30.00 Solution Sol				e 'Receipt Included'	
Hotel Accommodations 150.0	0 Total Amount	* 30.00		checkbox a	at the expense item level.		
Conference/Registration125.0 Fees	Memo Billable			Item Details Destination	× Boston, Massachusetts,	=	
Airfare - Commercial 250.0	Cash Advance Requested			Country	× United States of America [2]	:=	
	Worktags			Group Travel			
	*Cost Center	X CC012920 UASYS ERP Project	=	Paid by Traveler			
	Designated		:=				
	Grant		:=				
	Program		:=				

4. Click Submit.

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

