

FINDING & EDITING DRAFT SPEND AUTHORIZATION IN WORKDAY

This process guide supports processors that need to:

- Find and edit Spend Authorizations in Draft status in Workday.



Spend Authorizations are in Draft status when:

- They are initially created and have **not** been submitted.
- They are “Saved for Later.”
- The initiator exits and/or Workday times out while they are working on a Spend Authorization.

INSTRUCTIONS: FINDING A DRAFT SPEND AUTHORIZATION

- Run **RPT – Find Spend Authorization (UAMS)**.
- Check **Draft** in the **Spend Authorization Status** field.

Q RPT - spend authorization

- RPT - Open Spend Authorization Commitments (UAF) Report
- RPT - Find Spend Authorizations Report
- RPT - Find Spend Authorizations (UAMS) Report**
- RPT - Count of Spend Authorizations by Company Report
- Find Spend Authorization Lines for Organization Report
- Edit Report Group Task

RPT - Find Spend Authorizations (UAMS)

Instructions For Agent Advances please select the Business Purpose of 'Agent Advance'

Company * University of Arkansas for Medical Sciences

Business Purpose

Spend Authorization Status

For

Payee Type

Document Number

Initiating Worker

Spend Authorization Initiated by Worker

Approved
 Canceled
 Closed
 Draft
 In Progress

Cancel OK

CONTINUED: INSTRUCTIONS: FINDING/EDITING A DRAFT SPEND AUTHORIZATION

- You can use the **For, Spend Authorization Initiated by Worker**, and other fields to narrow your search results.
 - For** refers to the traveler on the Spend Authorization.
 - Spend Authorization Initiated by Worker** refers to the person that created the SA in Workday.
- Select OK. Results will show all the SAs in Draft status matching the criteria from your search.
- Click the Related Actions (...) button >**Spend Authorization** > **View** or **Close**.
 - View** to continue working on the SA.
 - Close** to delete the SA.

