Create Spend Authorization for Employees

Quick Reference Guide

Saint Joseph's University

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This Quick Reference Guide (QRG) is designed to walk through creating a spend authorization. By the end of the QRG, you will be able to successfully create a spend authorization in Workday. A spend authorization must be created prior to incurring expenses on behalf of the university.

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Important

- Travel Expenses
  - Approval of funds and leave for distance travel and professional meetings is required.
  - Before travel, create a spend authorization for approval. After travel, create the expense report.
  - Registration fees should be processed via the Supplier invoice module or reimbursed after the employee has paid for and attended to Conference not advanced to the employee directly.
- Out of Pocket Expenses (Non Travel)
  - Out of Pocket Expenses where employee will seek reimbursement from the university is required for $500 or more.

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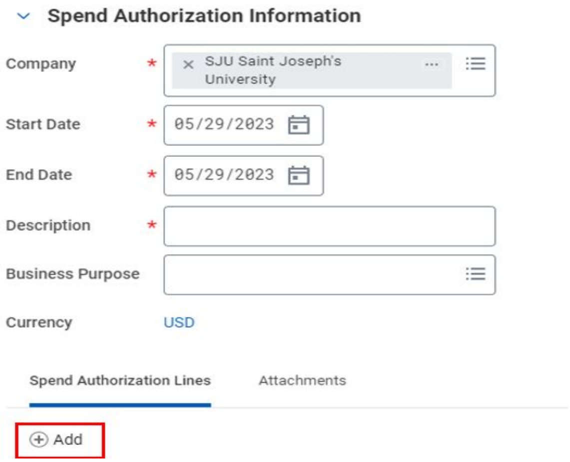
1. Using the Search field, enter and select **Create Spend Authorization**.
2. The **Company** is required and defaults. Modify as necessary.
3. The **Start Date** and **End Date** default to today's date. Modify as necessary.
4. Enter a **Description**.
5. The **Reimbursement Payment Type** defaults. Modify as necessary.
6. In the Spend Authorization Lines tab, click **Add**.



7. Enter an **Expense Item**
8. Select the **Quantity** and specify the **Per Unit Amount**. Together these calculate the total amount.
9. Enter a **Memo**, if applicable.
10. Select the **Cash Advance Requested** box, if applicable.
11. The **Cost Center**, **Fund**, and **Program** default. Modify as necessary.

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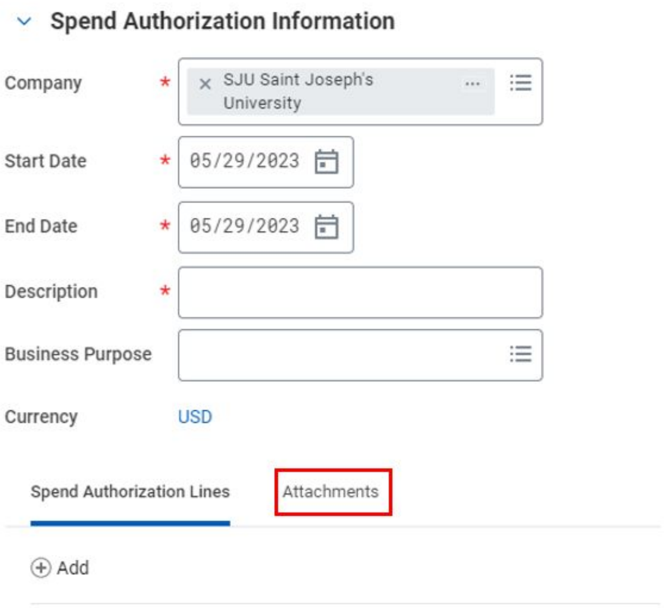
12. Click the **Attachments** tab.



13. Drag and drop or click **Select files** to upload any supporting documentation.

Note: Attachments include all supporting documentation associated with the cost of the spend authorization.

14. Click **Submit.**

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EDIT SPEND AUTHORIZATION

1. Search **My Spend Authorizations** in the Search field
2. Select the **Actions** button next to the Spend Authorization number
3. Choose **Change Spend Authorization** or **Close Spend Authorization**
4. You are allowed to make changes to a spend authorization, but keep in mind that changing the spend authorization will route the request back to supervisor and cost center managers for approval.

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Questions?

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SJU Workday Website