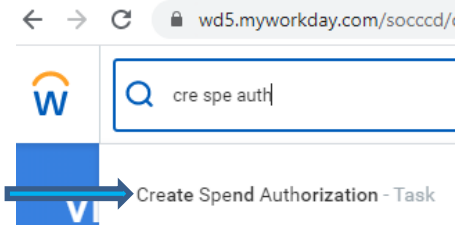


Create a Spend Authorization in Workday

In Workday, type **Create Spend Authorization** (or cre spe auth) and click on the option as it appears below:



1. Complete the fields indicated in the image below:

- **Start Date** – Date your travel begins
 - **End Date** – Date of return
 - **Description** – Conference/Event Title
 - **Business Purpose** – Travel/Conference
 - **Justification** – Copy and paste from award notice email
 - **Spend Authorization Total** – will fill automatically – do not change this field
- Note: Do not change Company or Reimbursement Payment Type

A screenshot of the 'Create Spend Authorization' form in Workday. The form is titled 'Create Spend Authorization' and is for Employee: Christie Smead (021216). It shows the following fields and values:


- Cash Advance Requested: 0.00 USD
- Spend Authorization Total: 0.00 USD
- Company: South Orange County Community College District
- Start Date: 02/07/2020
- End Date: 02/07/2020
- Description: (empty)
- Business Purpose: (empty)
- Spend Authorization Total: 0.00
- Currency: USD
- Reimbursement Payment Type: Check General Fund
- Justification: (empty)


Blue arrows point to the Start Date, End Date, Description, Business Purpose, and Justification fields. The form also includes a 'Submit' button, a 'Save for Later' button, and a 'Cancel' button. A 'Viewing' icon is visible in the bottom right corner.

2. At Spend Authorizations Lines, click on  Add


Spend Authorization Information

Company * South Orange County Community College District

Start Date * 02 / 07 / 2020 

End Date * 02 / 07 / 2020 



Description * Test Conference

Business Purpose X Travel - Conference ... 

Spend Authorization Total * 0.00

Currency USD

Spend Authorization Lines Attachments

  Add

3. **Jumping ahead to save you some work** – Change the Worktags (aka funding source - Fund, Cost Center and Program) first. Each line you add after you do this will automatically select the Academic Senate work tags, rather than your Department Worktags.

Academic Senate Worktags

Fund: 010


Cost Center: 13310


Program: 603000


4. For each line in the **Expense Item** field, type, or select from the options. Note: Do not select any Pre-Pay options (i.e. Registration or Hotel Accommodations)

Enter the estimated/approximate expense approved in Total Amount line

Spend Authorization Lines Attachments

 Add

0.00 **Spend Authorization Line** 

Expense Item * 

Quantity * 1


Per Unit Amount * 0.00


Total Amount * 0.00


Memo


Cash Advance Requested


Worktags


*Fund X 010 General Fund Unrestricted ... 


*Cost Center X 13310 SC-Academic Senate ... 


Program X 603000 Academic Senate ... 


Additional Worktags 

4a. 0.00 **Spend Authorization Line** 

Expense Item * regist 

Quantity * 


Per Unit Amount * 


Total Amount * 


Memo


Cash Advance Requested

Worktags

*Fund X 010 General Fund Unrestricted ... 

*Cost Center X 13310 SC-Academic Senate ... 


Program X 603000 Academic Senate ... 

Additional Worktags 


regist


Search Results (2)


Prepaid Registration Fees (Check Request)

Registration 

4b. Spend Authorization Lines Attachments


 Add

Registration 200.00 **Spend Authorization Line** 

Expense Item * X Registration ... 

Quantity 1


Per Unit Amount 200.00


Total Amount * 200.00 


Memo


Cash Advance Requested

Worktags

*Fund X 010 General Fund Unrestricted ... 

*Cost Center X 13310 SC-Academic Senate ... 

Program X 603000 Academic Senate ... 

Additional Worktags 

5. Add all lines, as approved, on your funding request, not to exceed the total approved amount (you may need to reduce the amounts to achieve this)

The **Spend Authorization Total** automatically sums your expense item lines. Adjust the values in the line items

0.00 USD 523.30 USD

For travel, please refer to Travel Procedures. For refreshments, please refer to AR-3520.

Spend Authorization Information

Company: South Orange County Community College District

Start Date: 03/05/2020

End Date: 03/07/2020

Description: Test Conference

Business Purpose: Travel - Conference

Spend Authorization Total: 523.30

Currency: USD

Spend Authorization Details

Reimbursement Payment Type: Check General Fund

Justification: Academic Senate's Faculty Development Funding Committee has awarded \$800 to Jay Deering to attend the United Conference in San Diego, CA, March 6-7, 2020. Reimbursement only, not to exceed \$800.

Spend Authorization Lines

Expense Item	Quantity	Per Unit Amount	Total Amount
Meal - Dinner	1	30.00	30.00
Meal - Lunch		34.00	
Meal - Breakfast		28.00	
Hotel Accommodations		150.00	

Buttons: **Submit** | Save for Later | Cancel

6. To check for errors, or save your progress, click on **Save for Later** – This will save a draft of your spend authorization. Make a note of the SA Number (i.e. SA011357)

7. To edit, click on **Edit Spend Authorization**

W | cre spe auth | 2 Errors | View All

Create Spend Authorization

SA011357 Autosave

For: Christie Smead (021216)

Status: Draft

Cash Advance Outstanding Balance	Cash Advance Requested	Spend Authorization Total
0.00 USD	0.00 USD	0.00 USD

Spend Authorization Information

Company: South Orange County Community College District

Start Date: 02/07/2020

End Date: 02/07/2020

Description: Test Conference

Business Purpose: Travel - Conference

Spend Authorization Total: 0.00

Currency: USD

[View Exceptions](#)

Spend Authorization Details

Reimbursement Payment Type: Check General Fund

Justification: Academic Senate's Faculty Development Funding Committee has awarded \$800 to Jay Deering to attend the United Conference in San Diego, CA, March 6-7, 2020. Reimbursement only, not to exceed \$800.

Expense Report(s): (empty)

Cash Advance Repayments: (empty)

[Edit Spend Authorization](#) | Done

8. Add your approved Faculty Development Funding application to the **Attachments** tab

For travel, please refer to Travel Procedures. For refreshments, please refer to AR 3520.

The screenshot shows a 'Spend Authorization Information' form. The 'Attachments' tab is selected and highlighted with a blue arrow. The form fields include: Company (South Orange County Community College District), Start Date (03/05/2020), End Date (03/07/2020), Description (Test Conference), Business Purpose (Travel - Conference), Spend Authorization Total (523.30), and Currency (USD). To the right, a 'Spend' section is partially visible with fields for Reimbursement Percentage and Justification. Below the form, a 'Drop files here' area is shown with a 'Select files' button, both indicated by blue arrows.

9. Once you have attached your approved application, you may Submit, or first select Save for Later, then Edit, to verify each line item Worktags, amounts and attachment, then click Submit

The screenshot shows three action buttons: 'Submit' (highlighted with a blue arrow), 'Save for Later', and 'Cancel'. The 'Spend Authorization Lines' and 'Attachments' tabs are visible above the buttons.

10. You will see a message verifying that you submitted your spend authorization

- Note the reference number for your records

You have submitted
Spend Authorization: SA011357, Christie Smead (021216) on 03/05/2020 for 523.30 USD [Actions](#)

Contact the Academic Senate Office @ 949-582-4969, or email csmead@saddleback.edu, if you have any questions.