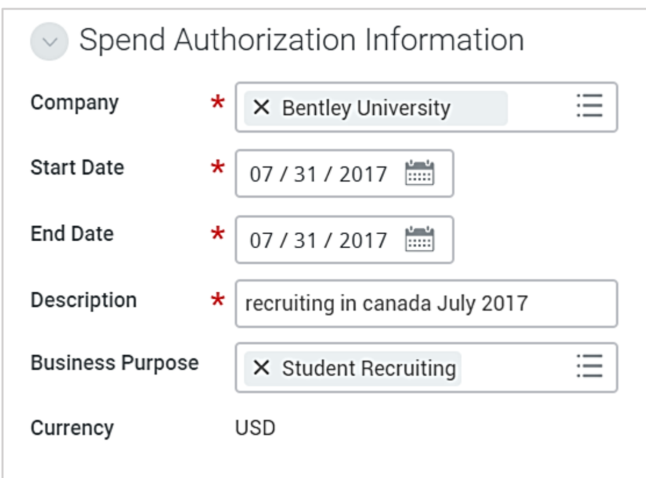
CREATING A SPEND AUTHORIZATION

Purpose: The purpose of this task is to create a spend authorization for the expenses you plan to incur

Helpful Hints:
- Spend authorizations are not necessary for local travel or other reimbursable expenses.
- Spend authorizations will encumber your budget dollars

1. Click the Expenses worklet, then **Create Spend Authorization** or search for “create spend authorization” in the search bar.

2. Fill out all required fields, including **Start Date, End Date, Description,** and **Business Purpose.**


Spend Authorization Information

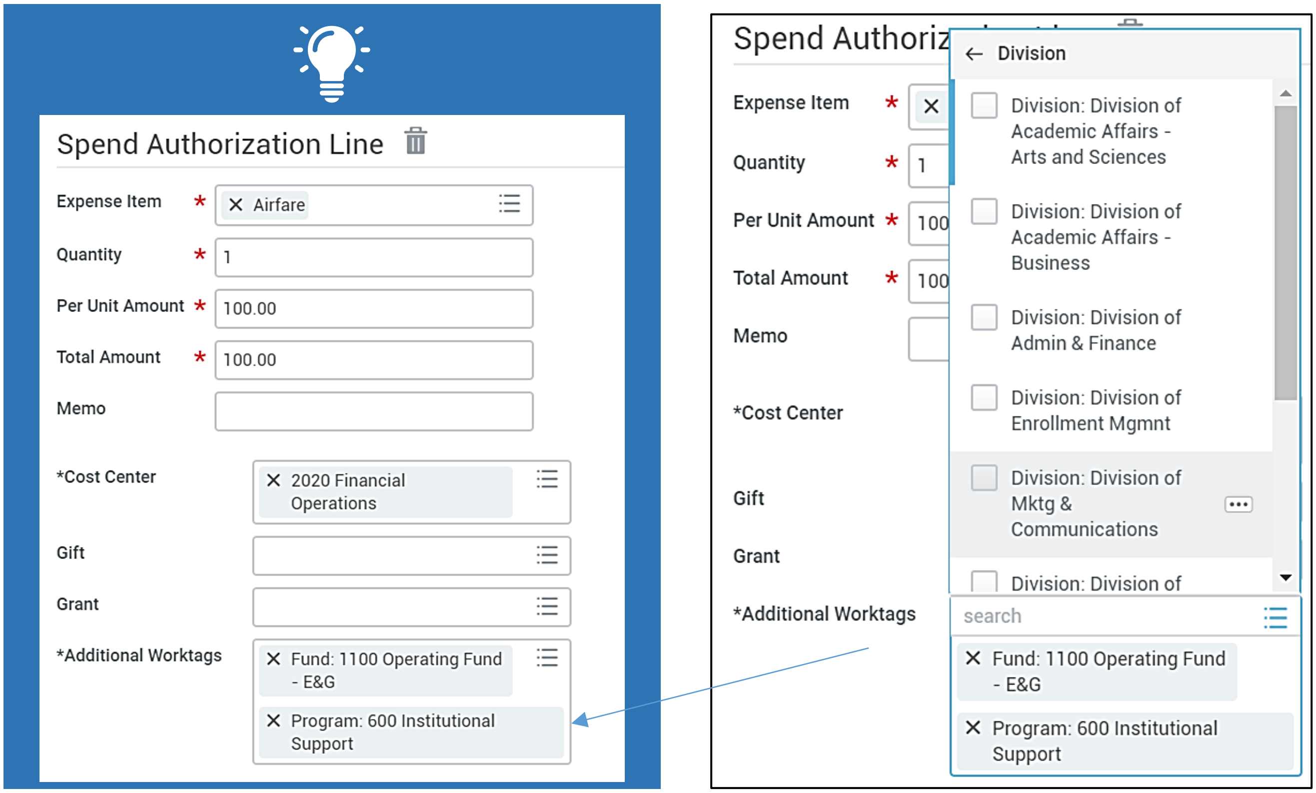
Company *	Bentley University
Start Date *	07 / 31 / 2017
End Date *	07 / 31 / 2017
Description *	recruiting in canada July 2017
Business Purpose	Student Recruiting
Currency	USD

Note 1: When creating a Spend Authorization, you must select a business purpose, even though no asterisk appears

3. Fill out the **Justification Field** which is a more detailed purpose for the spend authorization.

4. Click the Add button for each expense item you want to include. Do not click **Submit** until you have added all desired expense items. If you accidentally click **Submit**, please refer to the section titled “View and Edit Spend Authorizations.”

5. For each expense item, the fields **Cost Center, and the Additional Worktags of Division, Fund** and **Program** will default from your employee profile. If **Division** does not default, you must click on additional worktags and select the appropriate division. Change these worktags only if you need to change the expense to another cost center (although once you change the cost center, these three worktags should change to the default on that cost center as well). This will then route to the appropriate approver.



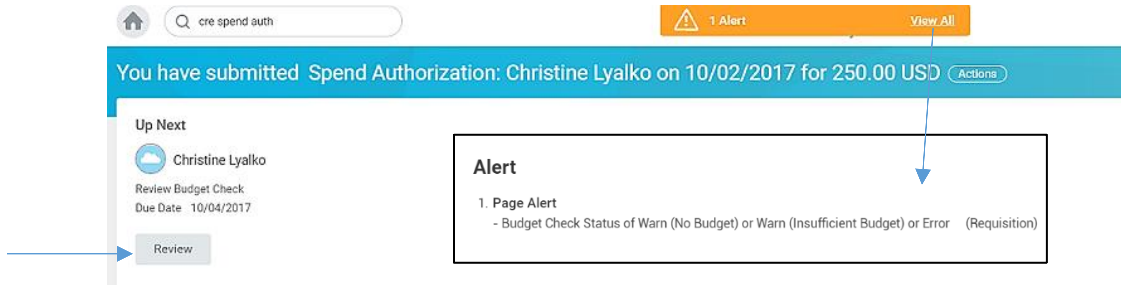
6. Click ⊕ Add to include any additional expenses. *Do not press submit until all expense lines are entered.*

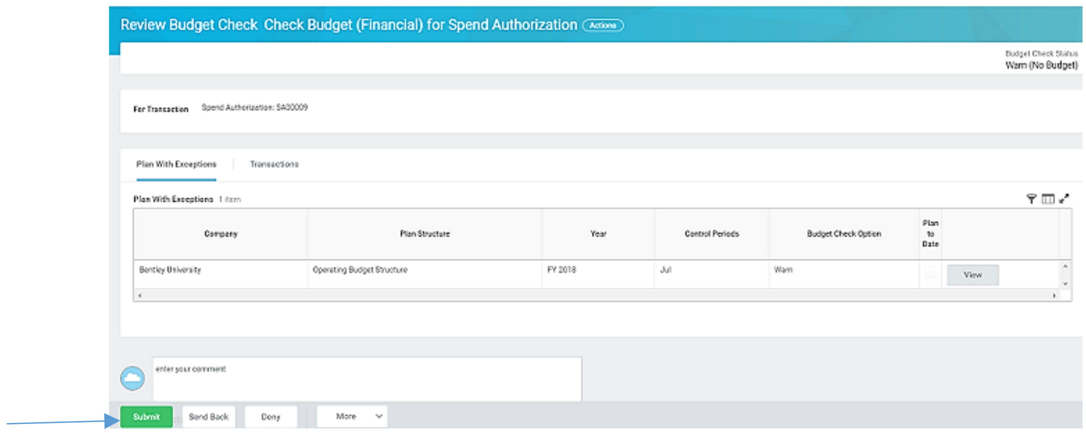
   <u>Note</u>: Some expense items require additional information. For example, if expense item selected is airfare, you must include the country you are flying to.

7. If you would like to provide any additional details, include them in the **Memo** field of each expense item or in the **Attachments** tab.

8. Once all expenses are complete, press **Submit.**

Workday will check for a sufficient budget to complete the purchase. If the budget check fails you will receive an alert. Click **Review** and submit or deny the budget check.





If you forget to review your budget check, you must go back into your inbox and approve the budget check before the spend authorization is forwarded on to the next approval step.

Once completed your spend authorization report will be forwarded to your direct manager and cost center manager for approval.