

HOW TO CREATE A TRAVEL SPEND AUTHORIZATION

Spend authorizations are used to grant permission for future expenses, specifically travel. Connect to Workday from the Google Apps icon within Email or Calendar.

From the Expenses application 
Expenses

1. Click **Create Spend Authorization**.
2. Enter Spend Authorization Information including your University, Start/End Dates, Description of Travel, Business Purpose, and Justification for travel (this is basic information why you are traveling).
3. Add Spend Authorization Lines by clicking **+Add**. During the process you can add more lines by utilizing the **+ Add** button for each expected expense.
4. Check for correct cost center (or grant, gift, program, or project if applicable) worktag as necessary. Do this step on the first line so it populates on additional lines added. *Note: if this is a grant related expense, select **Additional Worktags** and select **Grant Treatment**. Designate if this is Domestic Travel or International Travel.*
5. Each line is a travel related expected expense. For each expense, a Spend Authorization Line will be completed. All fields with ***** asterisks must be completed. The horizontal related actions pull down box allows you to choose expense items. These include related expenses, but are not limited to:
 - a. Airfare
 - b. Hotel
 - c. Vehicle Rental
 - d. Registration Fees
 - e. Mileage
 - f. Parking
 - g. Taxi and Ground Travel
 - h. Meals (separate Breakfast, Lunch, and Dinner and put

quantity to populate number of those meals at tier rate). Add information for departure and time, along with arrival (return) and time to guarantee you are in the window of reimbursement for meals.

- i. Any other related expenses (see drop down box under expense items).
6. Attachments can be added to justify travel or provide support documentation.
 7. After completing expense lines click **Submit** or **Save for Later** (this saves under **Recent** on Expenses page).
 8. Details and Process – allows review of information submitted and review of process.
 9. Click **Done**.



Note: Review the Travel Regulations for your University and the State of Louisiana prior to submitting a travel spend authorization. Also, Out of State Travel and International travel have specific requirements. Speak to your direct supervisor or Accounts Payable if you have questions.

VIEW AN EXISTING SPEND AUTHORIZATION OR EDIT A SPEND AUTHORIZATION WHICH HAS NOT BEEN APPROVED

From the Expenses application 
Expenses

1. Click the **Spend Authorizations** button under View.
2. Click the related actions ******* by the **Magnifying Glass** icon  to view Actions related to this authorization.
3. If a Spend Authorization has not been approved, you can modify this request by **Change Spend Authorization**. When complete, click **Submit** and **Done**.