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CREATE A SPEND AUTHORIZATION REQUEST

Spend authorizations are used to grant permission for group and/or international travel requests. *Note – if you are requesting permission for Educational Assistance, please use the "Employee Instructions for Educational Assistance" job aid located on RISD's Human Resources website (hr.risd.edu). **Please note, if submitting request on behalf of another employee – you would use the Create Spend Authorization for Worker task, entering the employee's name into the Worker field.

- 1. Click on the **Menu** button on the top left corner of the Workday homepage.
- 2. Click on the **Expenses** application
- 3. Click the Create Spend Authorization button under Actions.
- 4. Enter the travel start date into the **Start Date** field and the travel end date into the **End Date** field.
- 5. Enter the business purpose details into the **Description** field.
- 6. You can skip the Business Purpose drop down menu field.
- 7. In the **Justification** field, you can add more detail about the travel request.
- 8. Click the Add Row icon (+) to add spend authorization line item details.
- For group travel select the "Group Travel (Spend Authorization Use Only)" expense item. For international travel – select the "International Travel (Spend Authorization Use Only)" expense item.
- Enter the total amount of anticipated spend into the Total Amount field.
- 11. Use today's date for the **Budget Date** field.



- **12.** Itemize the spend breakdown in the **Memo** field (flight cost, hotel cost, etc).
- **13.** Select the appropriate accounting string (**Cost Center, Program**, etc).
- **14.** Click the **Attachments** tab and attach any and all available documentation (quotes, estimated costs spreadsheet, list of participants, etc).
- 15. Click Submit.

Quantity * 1 Per Unit Amount 5,800.00 Total Amount \$,800.00 Budget Date *			
Expense Item * X Group Travel (Spend Authorization Use Only) Quantity * 1 Per Unit Amount * 5,800.00 Total Amount * 5,800.00 Budget Date * 07/18/2024 = Memo 5 students and 2 faculty, Lodging co Worktags *Cost Center X Purchasing	orization Use	Spend Authoriza	tion Line 🔟
Per Unit Amount * 5,800.00 Total Amount * 5,800.00 Budget Date * 07/18/2024 = Memo 5 students and 2 faculty, Lodging co Worktags *Cost Center × Purchasing …		Expense Item *	
Total Amount * 5,800.00 Budget Date * 07/18/2024 = Memo 5 students and 2 faculty, Lodging co Worktags *Cost Center × Purchasing …		Quantity *	1
Budget Date * 07/18/2024 E Memo 5 students and 2 faculty, Lodging co Worktags *Cost Center × Purchasing …		Per Unit Amount *	5,800.00
Memo 5 students and 2 faculty, Lodging co Worktags *Cost Center × Purchasing …		Total Amount *	5,800.00
Worktags *Cost Center × Purchasing …		Budget Date *	07/18/2024 💼
*Cost Center		Memo	5 students and 2 faculty, Lodging cost \$4
		Worktags	
Program		*Cost Center	× Purchasing …
		Program	
Grant		Grant	
Gift		Gift	
Project		Project	
RISD Activity Code			

VIEW AN EXISTING SPEND AUTHORIZATION

From the Expenses application:

- 1. Click the Spend Authorizations button under View.
- 2. Click on the SA-XXXXX hyperlink on the left-hand side to view the Spend Authorization

My Spend Au	thorizations	Melanie Silva	***			
Create Spend Auth	horization					
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- **3.** Click the **Actions** button to either change or cancel the Spend Authorization.
- 4. Click the **Process History** tab to check the status of the spend authorization request.

You can also start a new spend authorization from the My Spend Authorizations page:

- **1.** Click the **Create Spend Authorization** button to create a new spend authorization. Enter spend authorization details.
- 2. Click Submit, then Done.

