Spend Authorization Quick Reference Guide
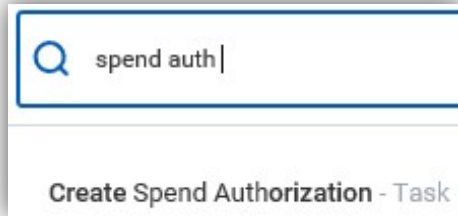
Create Spend Authorization

1) Log into Workday with your NetID and password https://wd5.myworkday.com/rochester/d/home.htmld
   a. All employees, even those who have never logged into Workday previously and do not have any roles assigned, can log in to complete a Spend Authorization.
2) In the Workday search bar type *Spend Auth*

3) Select **Create Spend Authorization**

4) Help Text is provided to guide you through what to enter in each field:

The following fields are required:

Company: Enter the Company where you expect the majority of expenses will be charged.

Start/End Date: Enter the departure and return dates for your travel.

Description: Enter a very brief trip type such as Research or Meetings.

Spend Authorization Total: Enter estimated total expenses for the trip.

Justification: Please copy the below into the Justification field and provide the answers for each section.
> **Destination**:
> **General Itinerary**:
> **Proposed Covid-19 risk mitigation measures**:
> **Explanation why travel is mission-critical to UR**:
> **Identify source of funding (UR or specify other source)**:

- Be sure to fill in your information for each of the prompts. Do not just copy the prompts to the Justification field.

5) **Attachments**
   a. An attachment can be optionally attached. An attachment such as emails discussing the trip or other documentation may help clarify any questions that the approvers may have.

6) Spend Authorization Lines should *not* be added. A validation will force you to remove any lines/information added before submission.
7) 3 actions buttons are available:
   a. Click **Cancel** to discard your entries.
   b. Click **Save for Later** to save your entries for completion/submission later.
   c. Click **Submit** when you have filled in all the required information and want the Spend Authorization to route for approval.

8) Upon successful submission, you will see that the Spend Authorization has routed to the Expense Partner International.

Otherwise, you might have gotten an error message. Click on the red indicator to review the error details:

a) All fields in the Header are required and you should not include any Lines.

Spend Authorization Information

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Company	*	× 010 Central Administration ... ≔
Start Date	*	08 / 10 / 2020 📅
End Date	*	08 / 13 / 2020 📅
Description	*	Research
Spend Authorization Total	*	3,500.00

Spend Authorization Details

Justification
Destination: Hawaii
General Itinerary: 2 days of research meetings
Proposed risk mitigation measures: social distancing and masks
Explanation why travel is essential to UR: COVID antibody research

9) Upon approval, you will be sent an email with instruction on how to print the fully approved Spend Authorization as well as reminders to submit it with your F2 to our travel agent for advance airline reservations and for F3 business expense report submissions. You *will not be reimbursed* for travel-related expenses if the approved spend authorization does not accompany your expense report.

    a. The email will contain a link that you can click that will bring you to the Workday login screen.

    b. You can locate the status of your Spend Authorization in Workday by going to **My Spend Authorizations**

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My Spend Authorizations - Report   My Spend Authorizations
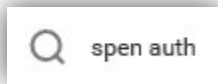
My Spend Authorizations 10 items

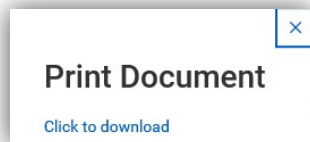| Spend Authorization	Spend Authorization Number	Start Date	End Date	Spend Authorization Status	Description	Spend Authorization Total	Currency	Company

    i. Click on the magnifying glass of the spend authorization you want to use for F2 and/or F3 purposes

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    ii. Upon locating the approved Spend Authorization, click on the printer icon in the upper right-hand corner and save the document as a PDF.

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        1. Select Click to download

Print Document
Click to download ×

        2. Save the Spend Authorization as a PDF for submission with F2 and/or F3 forms.