

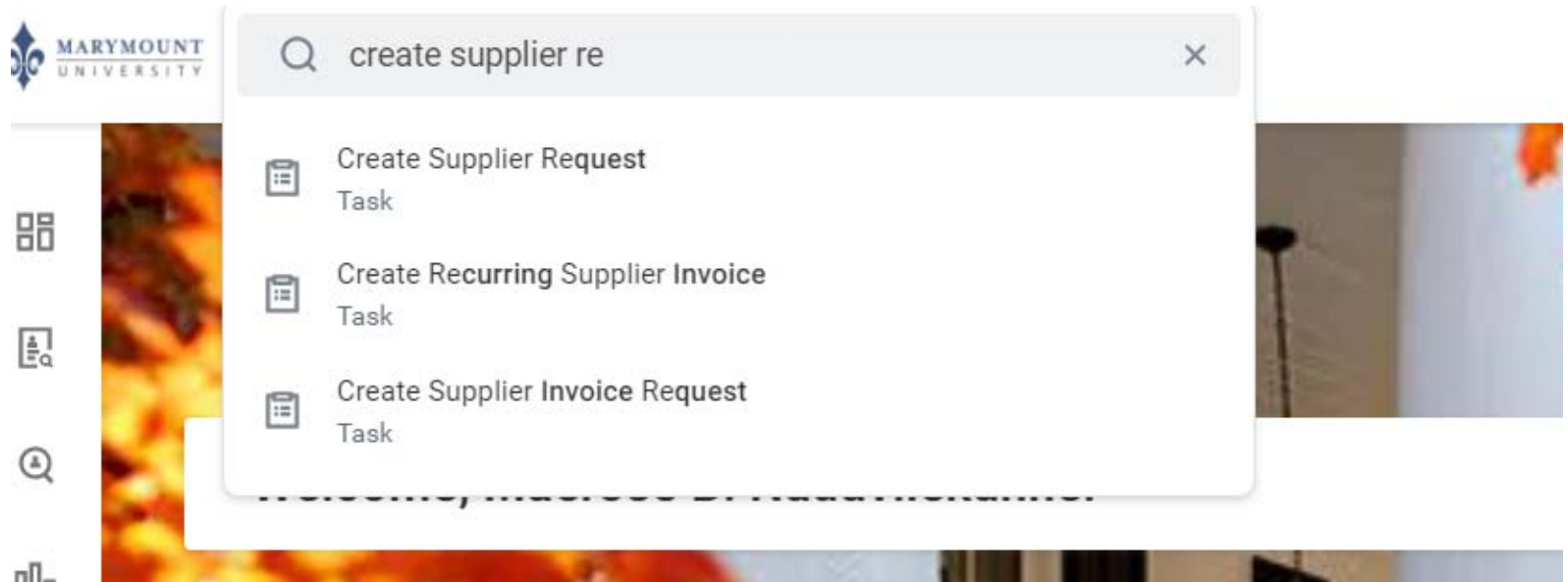
Create Supplier Invoice Request

QUICK TAKE: Create Spend Authorization – Required for All Travel

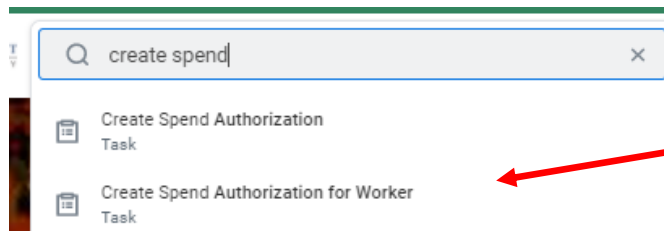
Create Spend Authorization

- Approved Spend Authorization is required prior to all travel
- Department Admins can submit Spend Authorization on behalf of another worker
- Spend Authorizations cannot be created via Workday Mobile
- All Spend Authorizations will require Cost Center Manager Approval
- If you do not have a MU Commercial Credit Card, a Cash Advance can be requested via Spend Authorization

Create Spend Authorization



Create Spend Authorization



- Spend Authorization will be **required** for ALL Travel
- Department admins are set-up to complete Travel on behalf of another Worker (Manager)
- Employees that who do not have a Travel Card can request Cash Advance when creating Spend Authorization
- Cash Advance can be set-up as Direct Deposit
- Once Travel is completed, employee will references Spend Authorization
- Spend Authorization cannot be created via Workday Mobile

Create Spend Authorization

Create Spend Authorization

For Employee: La Sandra N. Lockett
 Cash Advance Requested 0.00 USD
 Spend Authorization Total 0.00 USD

RED * information is required

Expense Policy: <https://my.marymount.edu> [my.marymount.edu]

▼ Spend Authorization Information

Company *

Start Date *

End Date *

Description *

Business Purpose

Currency USD

Description *

Business Purpose

- Classroom Supplies
- Commercial Card Transactions (Non-Travel)
- Events
- Membership Fees
- Research Expense
- Travel

⊕ Add

▼ Spend Authorization Details

Reimbursement Payment Type *

Justification

- Check On-Site
- Direct Deposit

- Company Automatically Populates
- Input Start and End Date for Travel
- Description Required
- Business Purpose – click on icon to pick
- Reimbursement Payment Type – click on icon to select
- Next Create Spend Authorization Lines

Create Spend Authorization for Worker

Create Spend Authorization for Worker

Cash Advance Requested: 0.00 USD Spend Authorization Total: 0.00 USD

Spend Authorization Information

For *

Company *

Start Date * 05/14/2021

End Date * 05/14/2021

Description *

Business Purpose

Spend Authorization Total * 0.00

Currency: USD

RED * information is required

Spend Authorization Lines

+ Add

Description *

Business Purpose

Currency

Spend Authorization

+ Add

- Classroom Supplies
- Commercial Card Transactions (Non-Travel)
- Events
- Membership Fees
- Research Expense
- Travel

Entering Spend Authorization for Worker

- Input Workers Name
- Click on icon to search for name
- Company – Click on Icon or just Type Marymount
- Description – Required
- Business Purpose – click on icon to pick
- Spend Authorization Total

Spend Authorization Details

Reimbursement Payment Type *

Justification

Check On-Site

Direct Deposit

Selected Reimbursement Payment Type for Worker

Create Spend Authorization

RED * information is required

Select Expense Item - by Expense Item Group, Spend Category or Alphabetical order

Click on Item Group to see list of Spend Category

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

Cost Center

Grant

Gift

Additional Worktags

Selected Expense item

Search

By Expense Item Group

By Spend Category

Search

← By Expense Item Group

Classroom Supplies

Dues, Membership & Subscription

Events & Entertainment

Postage & Courier

Supplies

Travel

Submit Save for Later Cancel

← Travel

Airfare - Domestic

Airfare - International

Car Rental

Conference

Food

Gas/Fuel

Hotel

Meals

Mileage

Parking

Taxi

Tolls

Create Spend Authorization

⊕ Add

| Spend Authorization Line | |
|--------------------------|-------------------------------|
| Airfare - Domestic | 500.00 |
| Expense Item | * X Airfare - Domestic ... |
| Quantity | * 1 |
| Per Unit Amount | * 500.00 |
| Total Amount | * 500.00 |
| Memo | Travel to Orlando FL |
| Cash Advance Requested | <input type="checkbox"/> |
| Worktags | |
| *Fund | X 10 Operating |
| Cost Center | X 4700000 Business Office ... |
| Grant | |
| Gift | |
| Additional Worktags | |

Selecting Expense Items

There may be additional information required:

- Airfare – Must select Airline
- Hotel – Select Hotel
- Rental Car – Select Rental Card Company (Company Discounts from National/Enterprise)

Check on Cash Advance Request if you do not have a Travel Card

Fund and Cost Center assigned to you will appear automatically


- If there needs to be a change to Cost Center, click on Icon to select different Cost Center

Click Add to add additional expense lines

Create Spend Authorization

Spend Authorization Lines Attachments

+ Add

| Spend Authorization Line  | |
|--|---|
| Car Rental 0.00 | Expense Item * X Car Rental ... |
| Airfare - Domestic 500.00 | Quantity * 1 |
| | Per Unit Amount * 0.00 |
| | Total Amount * 0.00 |
| | Memo |
| | Cash Advance Requested <input type="checkbox"/> |
| Worktags | |
| *Fund | X 10 Operating ... |
| Cost Center | X 4700000 Business Office ... |
| Grant | |
| Gift | |
| Additional Worktags | |

Instructional Text

Preferred Car Rental Agency: National Rental Car (www.nationalcar.com) or Enterprise Rental Car (www.enterprise.com)
Account # 1682940
Company Incorporated Discount # XZ16F05

Item Details

Car Rental Agency * X Enterprise ...

Create Spend Authorization

Spend Authorization Lines Attachments

⊕ Add Viewing

| Expense Item | Amount |
|--------------------|--------|
| Hotel | 400.00 |
| Car Rental | 350.00 |
| Airfare - Domestic | 500.00 |

Spend Authorization Line

Expense Item * X: Hotel ...

Quantity

Per Unit Amount 400.00

Total Amount * 400.00

Memo

Cash Advance Requested

Worktags

*Fund X: 10 Operating

Cost Center X: 4700000 Business Office

Grant

Gift

Additional Worktags

Instructional Text

Accommodation, Dwelling, Abode, Housing

Item Details

Arrival Date * 05/17/2021

Departure Date * 05/20/2021

Destination * X: Orlando, Florida, United States of America

Number of Days * 4

Note: Hotels Pre Diem Link can be found in Travel Policy

Create Spend Authorization

Click here to sort

| | |
|--------------------|--------|
| Meals | 260.00 |
| Hotel | 400.00 |
| Car Rental | 350.00 |
| Airfare - Domestic | 500.00 |

Spend Authorization Line

Expense Item *

Quantity *

Per Unit Amount *

Total Amount *

Memo

Cash Advance Requested

Worktags

*Fund

Cost Center

Grant

Gift

Additional Worktags

Instructional Text

Events, Refreshments

Item Details

Destination *

Note: Meals Pre Diem Link can be found in Travel Policy

Create Spend Authorization

Spend Authorization Lines

Attachments

+ Add

Click here to sort

| Item | Amount |
|--------------------|--------|
| Mileage | 14.38 |
| | 0.00 |
| Meals | 260.00 |
| Hotel | 400.00 |
| Car Rental | 350.00 |
| Airfare - Domestic | 500.00 |

Spend Authorization Line

Expense Item *

Quantity *

Per Unit Amount 0.575

Total Amount 14.38

Memo

Cash Advance Requested

Worktags

*Fund

Cost Center

Grant

Gift

Additional Worktags

Mileage Rate is Set

Quantity is total Miles

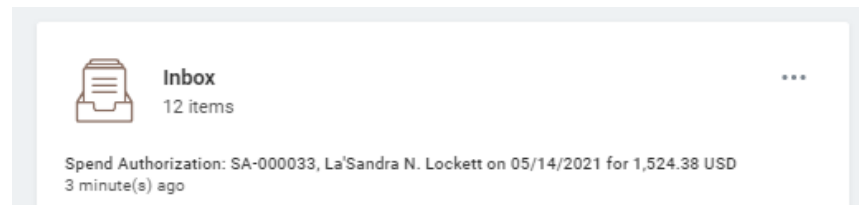
Create Spend Authorization

Once Spend Authorization lines has been completed, click Submit at the bottom of the screen.

Next step Spend Authorization is routed to the Cost Center Manager



The Cost Center Manager will receive notification in their Workday Inbox



Approval of the Spend Authorization

Review Spend Authorization: SA-000033, La'Sandra N. Lockett on 05/14/2021 for 1,524.38 USD

4 minute(s) ago

For Spend Authorization: SA-000033

Overall Process Spend Authorization: SA-000033, La'Sandra N. Lockett on 05/14/2021 for 1,524.38 USD

Overall Status In Progress

Due Date 05/28/2021

Details to Review

For La'Sandra N. Lockett
 Company Marymount University
 Start Date 05/14/2021
 End Date 05/14/2021
 Description Travel to Orlando, FL
 Justification (empty)
 Business Purpose Travel
 Reimbursement Payment Type Direct Deposit
 Cash Advance Requested 0.00 USD
 Spend Authorization Total 1,524.38 USD

| Click here to sort | | Spend Authorization Line | |
|--------------------|--------|--------------------------|--------------------------|
| Airfare - Domestic | 500.00 | Expense Item | * Airfare - Domestic |
| Car Rental | 350.00 | Quantity | * 1 |
| Hotel | 400.00 | Per Unit Amount | * 500.00 |
| Meals | 260.00 | Total Amount | * 500.00 |
| Mileage | 14.38 | Memo | Travel to Orlando FI |
| | | Cash Advance Requested | <input type="checkbox"/> |
| | | Worktags | |
| | | *Fund | 10 Operating |
| | | Cost Center | 4700000 Business Office |

Cost Center Manger can review each travel line.

Once reviewed, the Cost Center Manager can **Approve** or **Send Back** for additional information

After the Spend Authorization has been approved, you can review from expense application on your home screen

NEXT STEP: Submit Expense Report