

## 03\_Approve Spend Authorization

**Purpose:** The purpose of this task is to approve a Spend Authorization for expenses.

**How to Access:** Access your Workday **Inbox** and look for Actions that begin with “Spend Authorization”, and the title is **Review Spend Authorization**.

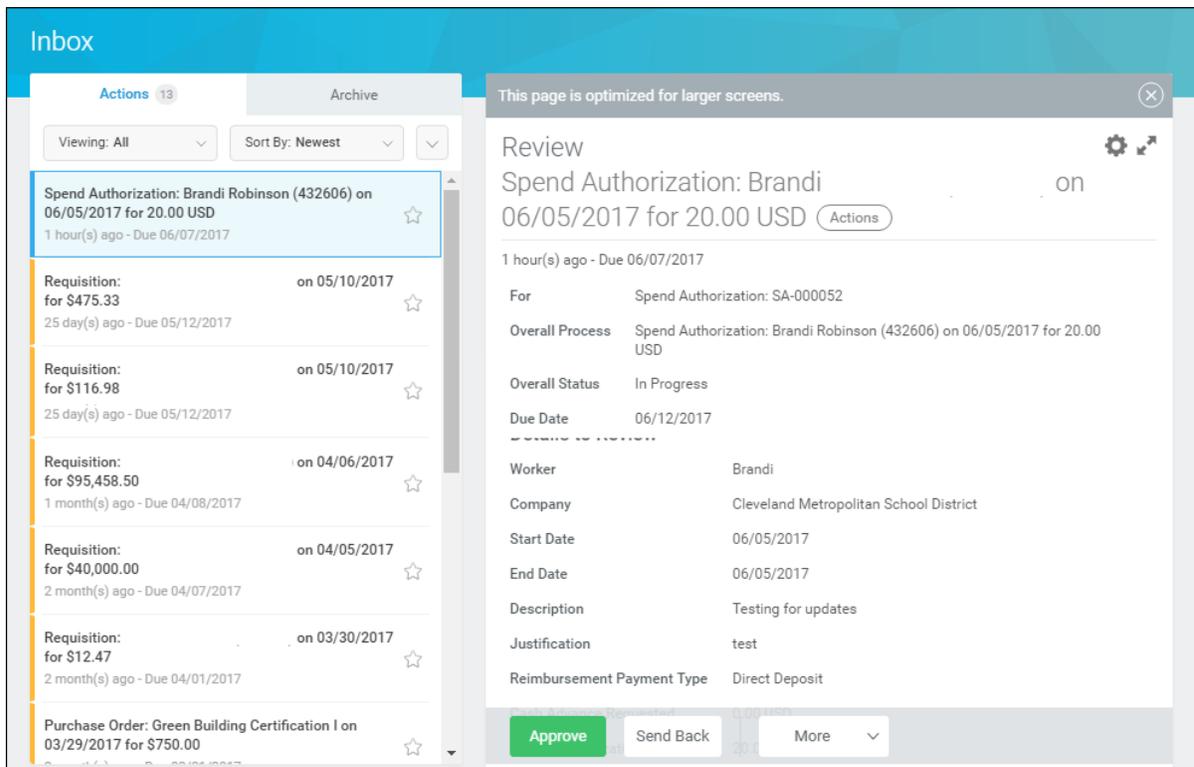
**Audience:** Approvers

**Helpful Hints:**

- Pending approvals show a number notification on **Inbox Worklet** icon. If no notification is visible, check with the creator of the **Spend Authorization** on submission.
- Be sure to check your inbox frequently to ensure open actions are processed in a timely manner.
- Workday displays fields in this task that CMSD is not using, only the fields listed in this document require you to complete, review, and/or update.

**Procedure:** Complete the following steps to approve a Spend Authorization.

### Inbox



The screenshot shows the Workday Inbox interface. On the left, a list of actions is displayed, including several requisitions and a purchase order. The top action, 'Spend Authorization: Brandi Robinson (432606) on 06/05/2017 for 20.00 USD', is highlighted. On the right, the detailed view of this action is shown. It includes fields for 'For', 'Overall Process', 'Overall Status', 'Due Date', 'Worker', 'Company', 'Start Date', 'End Date', 'Description', 'Justification', and 'Reimbursement Payment Type'. At the bottom of the detailed view, there are buttons for 'Approve', 'Send Back', and 'More'.

1. Select the required Spend Authorization.

**Note:** For the purpose of this work instruction, the required Spend Authorization Action displays.

- As required, review the following fields:

Field Name	Required / Optional	Description
<b>Due Date</b>	Required	Identifies the date when the Spend Authorization should be Approved, Sent Back, or Denied.
<b>Worker</b>	Required	Identifies the employee who created the Spend Authorization.
<b>Start Date</b>	Required	Indicates the first date of the expenditure.
<b>End Date</b>	Required	Indicates the ending date of the expenditure.
<b>Description</b>	Required	Identifies the title of the Spend Authorization.
<b>Justification</b>	Optional	Identifies the reason for the expenditure and should include the total estimated cost, with the District Paid costs broken out.
<b>Spend Authorization Total</b>	Required	Identifies the estimated total employee paid expenditures.

- Scroll down to the Spend Authorization line items.
- As required, review the following fields for each line item included in the Spend Authorization:

**Note:** It will be necessary to click on each line item to review the following fields.

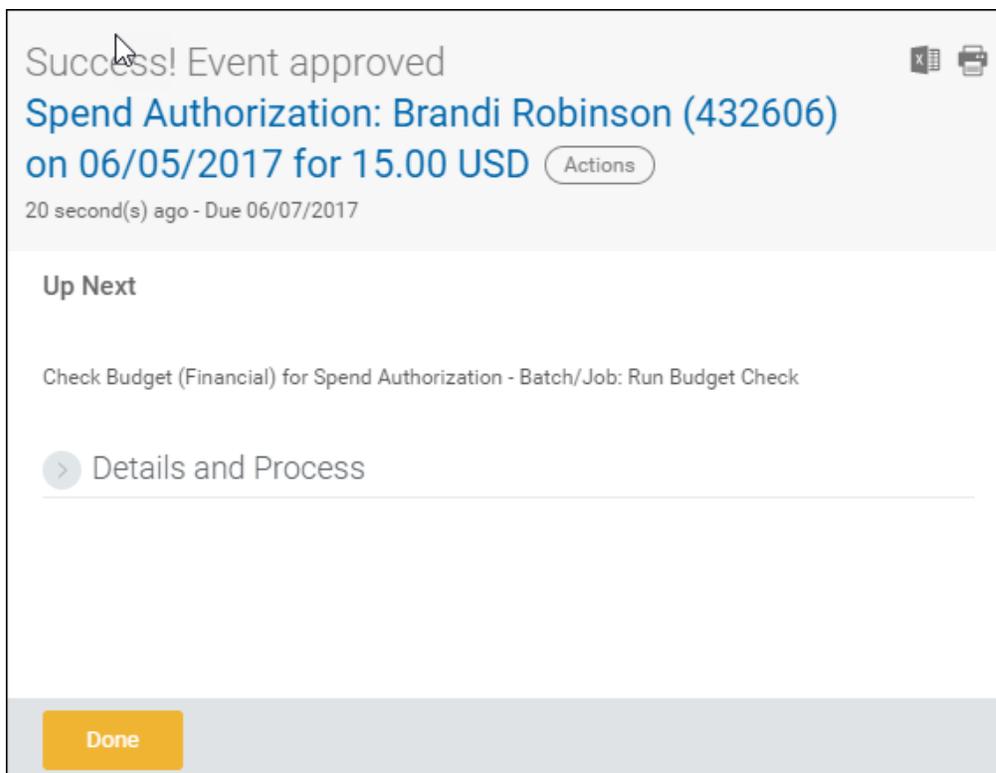
Field Name	Required / Optional	Description
<b>Expense Item</b>	Required	Indicates the type of expense.
<b>Quantity</b>	Required	Identifies how many items.
<b>Per Unit Amount</b>	Required	Identifies the dollar amount for each item.
<b>Total Amount</b>	Required	Identifies the total cost for the line item.
<b>Memo</b>	Optional	Use to provide additional information to those processing the Spend Authorization.
<b>Fund</b>	Required	Identifies the fund to pay for the line item.
<b>Cost Center</b>	Required	Identifies the location/department to pay for the line item.
<b>Function</b>	Required	Identifies the function to pay for the line item.
<b>Program</b>	Required	Identifies the program to pay for the line item.
<b>Additional Worktags</b>	Optional	Used when the Spend Authorization line item is being paid by a Grant, Gifts, or Projects

- Click the **Attachment** to open and review the details.
- Click **Done** to close the *Attachment* pop-up window.
- As required, enter any notes in the **enter your comment** field.

8. As required, complete one of the following:

If you want to...	Then...	Go to
Approve the Spend Authorization,	Click  .	<a href="#">Step 9</a>
Return the Spend Authorization to the initiator for updates,	Click  .	<a href="#">Step 11</a>
Reject the Spend Authorization,	Click More > Deny.	<a href="#">Step 15</a>

*Success! Even approved*



Success! Event approved ✕ 🖨

**Spend Authorization: Brandi Robinson (432606)**  
**on 06/05/2017 for 15.00 USD** Actions

20 second(s) ago - Due 06/07/2017

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**Up Next**

Check Budget (Financial) for Spend Authorization - Batch/Job: Run Budget Check

> Details and Process

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Done

9. Review the displayed information.

10. Click **Done**.

**Note:** You have successfully approved the Spend Authorization. Continue to the *Results* section of this document.

*Send Back*

### Send Back

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**To** \* X Brandi Robinson (432606) - Revise Spend Authorization

**Reason** \*

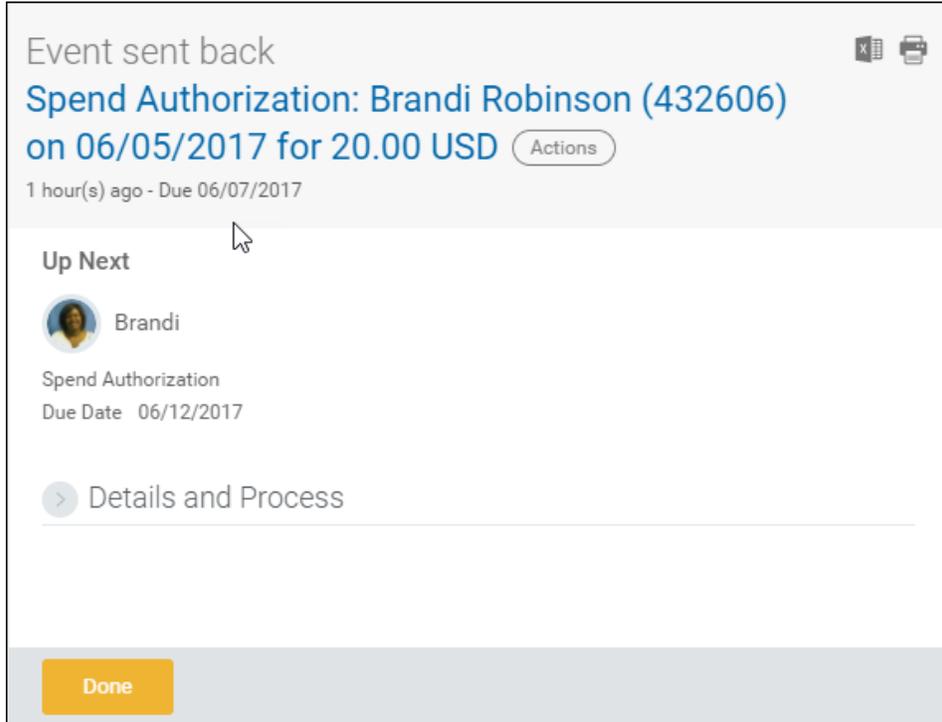
Submit
Cancel

11. Complete the following fields:

Field Name	Required / Optional	Description
<b>To</b>	Required	Identifies who to return the Spend Authorization for additional processing. Defaults to the initiator.
<b>Reason</b>	Required	Enter the reason why the Spend Authorization is being returned.

12. Click **Submit** to trigger the return of the Spend Authorization and return to the *Workday Inbox* screen.

*Event Sent Back*



Event sent back

**Spend Authorization: Brandi Robinson (432606)**  
**on 06/05/2017 for 20.00 USD** Actions

1 hour(s) ago - Due 06/07/2017

**Up Next**

 Brandi

Spend Authorization  
 Due Date 06/12/2017

[Details and Process](#)

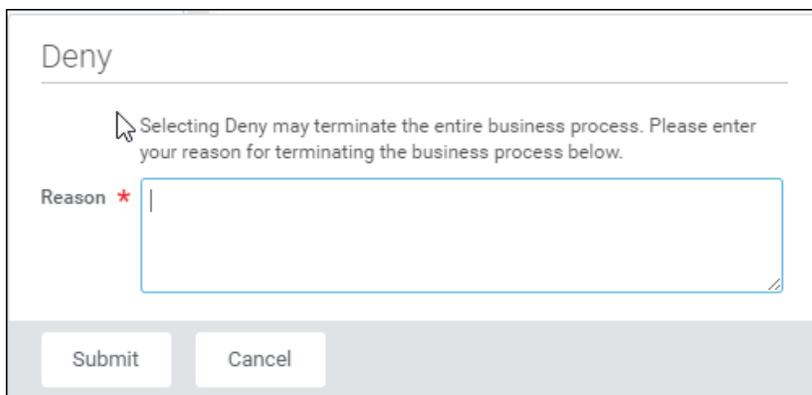
**Done**

13. Review Details and Process to confirm who the Spend Authorization was returned to.

14. Click **Done**.

**Note:** The approval process is now on hold until the person updating the Spend Authorization resubmits it for approval. Continue to the *Results* section of this document.

*Deny*



Deny

Selecting Deny may terminate the entire business process. Please enter your reason for terminating the business process below.

Reason \*

**Submit** **Cancel**

15. Complete the **Reason** field to enter why the Spend Authorization is being denied.

16. Click **Submit** to deny the Spend Authorization.

17. Click **Done** to confirm the cancelation of the Spend Authorization.

**Result:**

You have successfully processed the Spend Authorization from your Workday Inbox.