

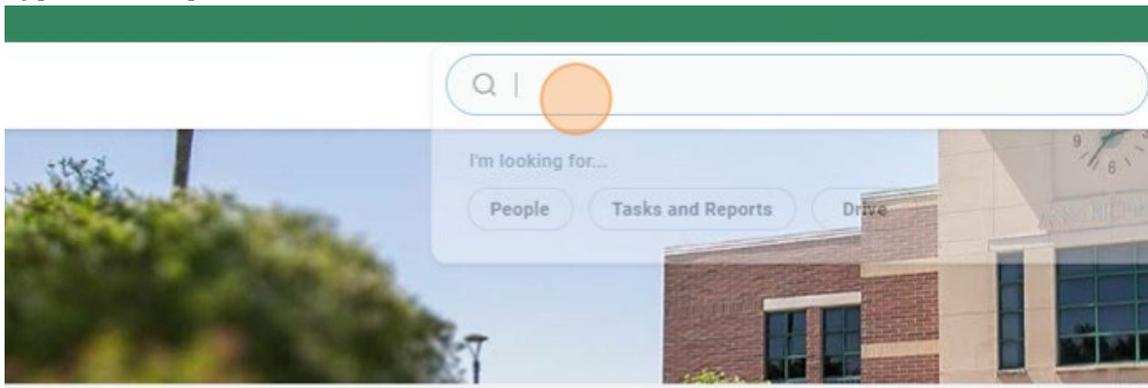
Expenses:

Create a Spend Authorization for Worker

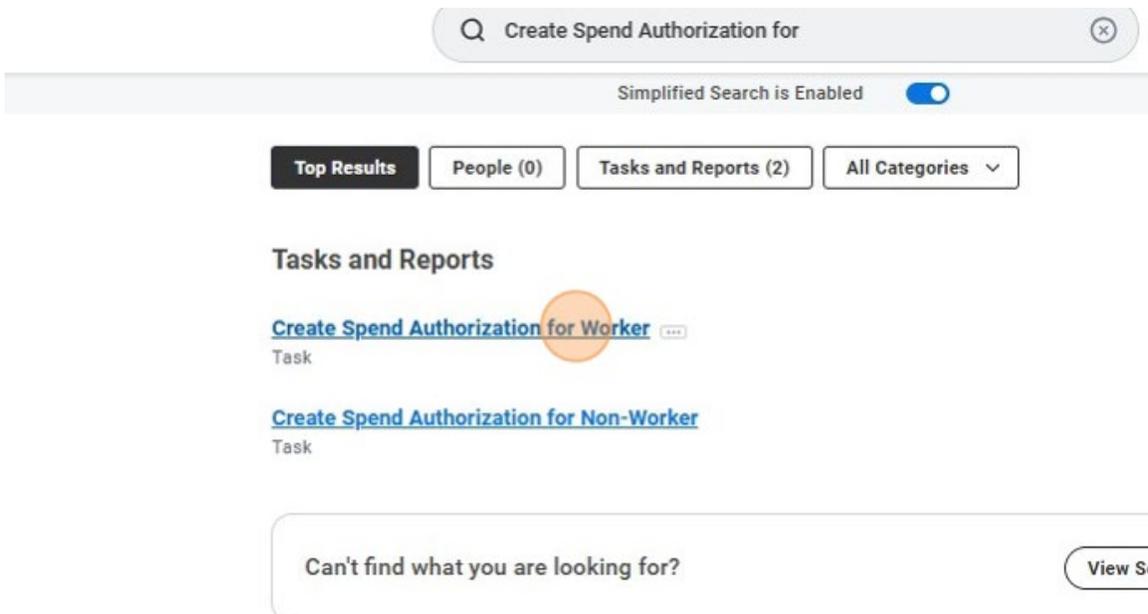
## Welcome to Workday!

*The following demonstration will show you how to create a Spend Authorization for Worker.*

1. From the Home Page, Click the "Search" field  
Type "Create Spend Authorization For" and hit enter.



2. Notice the Tasks and Reports are displayed. Click "Create Spend Authorization for Worker".



- 3. Click the "For" field and type in the Traveler Name.

*Please note that you can only create Spend Authorizations for an individual in your cost center.*

**Summary**

Cash Advance Requested	Spend Authorization Total
0.00 USD	0.00 USD

---

▼ **Spend Authorization Information**

For \*  

Company \*

Start Date \*  

End Date \*  

Description \*

- 4. You will need to enter the following information:

Start and End Date: Travel Dates

Description: First Initial\_Last Name\_City,State\_Dates

Business Purpose

- Up to date driver's License and insurance required for any type of mileage reimbursement

*Please view the Employee Travel Guide for the complete travel guidelines. If you have any questions or concerns, please contact the T...*

▼ **Spend Authorization Information** ▼ **Spend A**

Company \*   

Start Date \*  

End Date \*   

Description \*

Business Purpose  

Currency USD

[Spend Authorization Lines](#) [Attachments](#)

Reimbursemen  
Justification

Expenses:

Create a Spend Authorization for Worker

Company \*  ⋮

Start Date \*  📅

End Date \*  📅

Description \*

Business Purpose  ⋮

Currency USD

**Spend Authorization Lines** Attachments

+ Add

• Mileage

- Up to date driver's License and insurance required for any type of mileage reimbursement

Please view the *Employee Travel Guide* for the complete travel guidelines. If you have any questions or concerns, please contact the T...

▼ Spend Authorization Information

Company \*  Board of Trustees ⋮

Employee Reimbursement ⋮

In District ⋮

In State Travel ⋮

Start Date \*  International Travel ⋮

Out of State Travel ⋮

End Date \*  Student Club Travel ⋮

Description \*

Business Purpose  ⋮

Currency USD

▼ Spend A

Reimbursemen

Justification

5. Click the "Justification" field. Here you will answer the following questions:

1. What is the purpose of the travel?
2. Why is the travel necessary?
3. How does the travel benefit STC?

ement

ns or concerns, please contact the Travel Office.

▼ Spend Authorization Details

Reimbursement Payment Type \*

× Direct Deposit

Justification

6. The Spend Authorization Lines tab now displays. Select "Add" to begin adding your expenses.

End Date \* 01/01/2025

Description \* FirstInitial\_LastName\_City,State\_Dates

Business Purpose × In State Travel

Currency USD

**Spend Authorization Lines** Attachments

Add

**Submit** Save for Later Cancel

7. Click the "Expense Item" field.

0.00

0.00

Spend Authorization Line 

Expense Item \*  

Quantity \*

Per Unit Amount \*

Total Amount \*

Budget Date \*  

8. You can search by Expense Groups, Spend Categories, or Alphabetical Order

Spend Authorization Line 

Expense Item \*  

Quantity \*  >

Per Unit Amount \*  >

Total Amount \*  >

>

9. Add "Hotel"

A screenshot of a mobile application interface showing a list of expense categories. The categories are listed with radio buttons and three-dot menu icons. The 'Hotel' category is highlighted with an orange circle. The categories include: Airfare, Baggage Fees, Car Rental, Conference Materials, Fingerprinting Reimbursement, Fuel, Hotel, In-District Mileage, License / Certification Fees, Miscellaneous Reimbursable Expenses, Miscellaneous Travel Expenses, and Parking. The list is titled 'By Alphabetical Order'.

10. Hotel: You will need to enter the total amount and hotel details. Hotel Name - Arrival/Departure Dates, Any Breakfast Provided, Hotel Address, and Reservation #

A screenshot of a mobile application interface showing the 'Item Details' section for a hotel expense. The section includes a reminder: 'Reminder: If traveling in-state, please provide the hotel with the signed state tax exempt form.' The fields are: Hotel (with a dropdown menu open showing 'All Hotels' selected), Arrival Date, Departure Date (with a calendar icon), Number of Breakfasts Provided (with a value of 0), Reservation Number, and Merchant Address. The 'Hotel' field is highlighted with an orange circle.

Expenses:

Create a Spend Authorization for Worker

tel	0.00	Spend Authorization Line	
Expense Item	*	<input type="text" value="x Hotel"/>	Instructional T
Quantity		1	<b>Reminder: If trav exempt form.</b>
Per Unit Amount		0.00	Item Details
Total Amount	*	<input type="text" value="0.00"/>	Hotel
Budget Date	*	<input type="text" value="12/30/2024"/>	Arrival Date
Memo		<input type="text"/>	Departure Date
Cash Advance Requested		<input type="checkbox"/>	Number of Break
Worktags			Reservation Nun
*Cost Center		<input type="text" value="x CC00035 Business Office"/>	

11. You may request a cash advance for your hotel expense.

Quantity		1	<b>Reminder: I exempt forr</b>
Per Unit Amount		0.00	Item Detai
Total Amount	*	<input type="text" value="250.00"/>	Hotel
Budget Date	*	<input type="text" value="12/30/2024"/>	Arrival Date
Memo		<input type="text"/>	Departure C
Cash Advance Requested		<input checked="" type="checkbox"/>	Number of l
Worktags			Reservator
*Cost Center		<input type="text" value="x CC00035 Business Office"/>	Merchant A
*Additional Worktags		<input type="text" value="x Fund: FD10 Unrestricted Funds"/> <input type="text" value="x Location: Pecan Campus"/> <input type="text" value="x NACUBO Function: FN37 Institutional Support"/>	

12. Click "Add" to continue entering expenses

**Create Spend Authorization**

Business Purpose

Currency USD

**Spend Authorization Lines** Attachments

**+ Add**

Spend Authorization Line	
Hotel	250.00
Expense Item	* <input type="text" value="Hotel"/>
Quantity	1
Per Unit Amount	250.00

13. Add "Airfare"

**Spend Authorization Line**

0.00	Expense Item	* <input type="text" value="Search"/>
250.00	Quantity	* <input type="text" value="By Alphabetical Order"/>
	Per Unit Amount	* <input type="radio"/> Airfare
	Total Amount	* <input type="radio"/> Baggage Fees
	Budget Date	* <input type="radio"/> Car Rental
	Memo	* <input type="radio"/> Conference Materials
	Cash Advance Requested	* <input type="radio"/> Fingerprinting Reimbursement
		<input type="radio"/> Fuel
		<input type="radio"/> Hotel
		<input type="radio"/> In-District Mileage

Expenses:

Create a Spend Authorization for Worker

14. Airfare: You will need to enter the total amount and airfare details. Departure Date and Time, and Arrival Date and Time,

Spend Authorization Line		
0.00	Expense Item * <input type="text" value="Airfare"/>	Instructional Text
250.00	Quantity 1	Boarding passes req required.
	Per Unit Amount 0.00	
	Total Amount * <input type="text" value="0.00"/>	Item Details
	Budget Date * <input type="text" value="12/30/2024"/>	Departure Date *
	Memo <input type="text"/>	Departure Time *
	Cash Advance Requested <input type="checkbox"/>	Arrival Date *
	Worktags	Arrival Time *
	*Cost Center <input type="text" value="CC00035 Business Office"/>	
	*Additional Worktags <input type="text" value="Fund: FD10 Unrestricted Funds"/>	

Instructional Text	
	Boarding passes required. If reimbursement requested itemized receipts are required.
	Item Details
<input type="text"/>	Departure Date * <input type="text" value="MM/DD/YYYY"/>
<input type="text"/>	Departure Time *
<input type="text"/>	Arrival Date * <input type="text" value="MM/DD/YYYY"/>
<input type="text"/>	Arrival Time *

15. You may request a cash advance for your airfare expense.

Quantity	1	Boarding p required.
Per Unit Amount	127.27	Item Deta
Total Amount	* 127.27	Departure
Budget Date	* 12/30/2024	Departure
Memo		Arrival Dat
Cash Advance Requested	<input checked="" type="checkbox"/>	Arrival Tim
Worktags		
*Cost Center	X CC00035 Business Office	
*Additional Worktags	X Fund: FD10 Unrestricted Funds X Location: Pecan Campus	

**Submit** Save for Later Cancel

16. Add "Travel Registration"

250.00	Per Unit Amount	* <input type="radio"/> Per Diem (Meals)
Total Amount	* <input type="radio"/> Professional Memberships	
Budget Date	* <input type="radio"/> Reimbursable Registration	
Memo	<input type="radio"/> Relocation Fees	
Cash Advance Requested	<input type="radio"/> Student Meals	
Worktags	<input type="radio"/> Subscriptions	
*Cost Center	<input type="radio"/> Supplies	
*Additional Worktags	<input type="radio"/> Taxi and Ground Travel	
	<input type="radio"/> Tolls	
	<input type="radio"/> Travel Day Per Diem	
	<input checked="" type="radio"/> Travel Registration	
	<input type="radio"/> Trip Mileage	

Save for Later Cancel

17. Travel Registration: You will need to enter the total amount and conference details.

Spend Authorization Line	
Registration 0.00	Expense Item * <input type="text" value="Travel Registration"/>
127.27	Quantity 1
250.00	Per Unit Amount 0.00
	Total Amount * <input type="text" value="0.00"/>
	Budget Date * <input type="text" value="12/30/2024"/>
	Memo <input type="text"/>
	Cash Advance Requested <input type="checkbox"/>
	Worktags
	*Cost Center <input type="text" value="CC00035 Business Office"/>
	*Additional Worktags <input type="text" value="Fund: FD10 Unrestricted Funds"/>

Instructional Text	
	Registration includes conferences, seminars, out of district meetings, training & education. Itemized receipts required.
	Item Details
	Date From * <input type="text" value="MM/DD/YYYY"/>
	Date To * <input type="text" value="MM/DD/YYYY"/>

Expenses:

Create a Spend Authorization for Worker

18. You may request a cash advance for your registration expense.

Quantity	1	Registration Iter
Hotel	250.00	Item Data
Per Unit Amount	523.00	Date From
Total Amount	* 523.00	Date To
Budget Date	* 12/30/2024	
Memo		
Cash Advance Requested	<input checked="" type="checkbox"/>	
Worktags		
*Cost Center	X CC00035 Business Office	
*Additional Worktags	X Fund: FD10 Unrestricted Funds	
	X Location: Pecan Campus	

**Submit** Save for Later Cancel

**Per Diem: Travel Per Diem & Per Diem Meals**

19. Add "Travel Day Per Diem"

127.27	Per Unit Amount	* <input type="radio"/> Per Diem (Meals)
	Total Amount	* <input type="radio"/> Professional Memberships
250.00	Budget Date	* <input type="radio"/> Reimbursable Registration
	Memo	<input type="radio"/> Relocation Fees
	Cash Advance Requested	<input type="radio"/> Student Meals
	Worktags	<input type="radio"/> Subscriptions
	*Cost Center	<input type="radio"/> Supplies
	*Additional Worktags	<input type="radio"/> Taxi and Ground Travel
		<input type="radio"/> Tolls
		<input type="radio"/> Travel Day Per Diem
		<input type="radio"/> Travel Registration
		<input type="radio"/> Trip Mileage

Save for Later Cancel

Expenses:

Create a Spend Authorization for Worker

20. Travel Per Diem: You will need to enter your destination details, to obtain the correct per diem rate. Travel Per Diem will be calculated at 75% for your travel dates. This will not be eligible for cash advance.

Example: Traveling 12/30/2024 - 01/01/2024 Travel Per Diem will only be 2 Days.

**Remove any meals provided by the conference or hotel.**

**Select: Travel day per diem = departure and arrival dates of travel (number of days = 2) 75% of per diem daily rate (unless conference/hotel provides meals on travel days)**

Full day per diem (meals) = days at the event or conference/meeting – 100% of per diem daily rate (unless conference/hotel provides meals at event/conference)

- Example: Traveling Monday thru Thursday
- Select Travel Day Per diem for Travel days (2)= Monday and Thursday
- Full day per diem (2) = Tuesday and Wednesday

Item Details

Destination \*

Number of Days \*

Office

Restricted Funds

21. Add "Per Diem (Meals)"

Per Unit Amount	*	<input type="radio"/>	Conference Materials	<input type="text"/>
Total Amount	*	<input type="radio"/>	Fingerprinting Reimbursement	<input type="text"/>
Budget Date	*	<input type="radio"/>	Fuel	<input type="text"/>
Memo		<input type="radio"/>	Hotel	<input type="text"/>
Cash Advance Requested		<input type="radio"/>	In-District Mileage	<input type="text"/>
Worktags		<input type="radio"/>	License / Certification Fees	<input type="text"/>
*Cost Center	<input type="text"/>	<input type="radio"/>	Miscellaneous Reimbursable Expenses	<input type="text"/>
*Additional Worktags	<input type="text"/>	<input type="radio"/>	Miscellaneous Travel Expenses	<input type="text"/>
	<input type="text"/>	<input type="radio"/>	Parking	<input type="text"/>
	<input type="text"/>	<input type="radio"/>	Per Diem (Meals)	<input type="text"/>
	<input type="text"/>	<input type="radio"/>	Professional Memberships	<input type="text"/>
	<input type="text"/>	<input type="radio"/>	Reimbursable Registration	<input type="text"/>

Save for Later    Cancel

22. Per Diem Meals: You will need to enter your destination details, to obtain the correct per diem rate. Per Diem meals will be used for the dates between travel dates. This will not be eligible for cash advance.

Example: Traveling 12/30/2024 - 01/01/2024 Per Diem Meal will only be 1 Day.

of per diem daily rate (unless conference/hotel provides meals on travel days)  
**Select: Per Diem (Meals) for Full day**  
**conference/meeting - 100% of per diem rate (if hotel provides meals at event/conference)**

- Example: Traveling Monday
- Travel days (2)= Monday and
- Select: Per Diem Meal - Full Wednesday

Item Details

Destination \*

Number of Days \*

Number of Breakfasts Provided

Number of Lunches Provided

Number of Dinners Provided

23. Once you have added all your expenses, Click "Attachments" to upload your backup documents.

Implementation - southtexascollege7

### Create Spend Authorization

[Spend Authorization Lines](#) **Attachments**

+ Add

Click here to sort		Spend Authorization Line	
Per Diem (Meals)	80.00	Expense Item *	<input type="text" value="x Per Diem (Meals)"/>
Travel Day Per Diem	120.00	Quantity	1
Travel Registration	523.00	Per Unit Amount	80.00

24. Click "Select files" or "Drop Files"

nts

---

Drop files here

or

Select files

---

Cancel

25. Click "Submit"

Comment

---

 Hotel Confirmation Sample.pdf  
✓ Successfully Uploaded!

Comment

---

 Airline Confirmation Sample.pdf  
✓ Successfully Uploaded!

Comment

---

Upload

---

Submit Save for Later Cancel

26. Your Spend Authorization is now complete and has been submitted.

The screenshot shows the Workday Expenses Hub interface for 'cascollege7'. The top navigation bar includes the South Texas College logo and a search bar. The left sidebar contains navigation options: Expenses Hub, Reports, Transactions, Authorizations, Advances, and Profile. The main content area features a 'New' notification with a lightbulb icon, stating 'Did you send e...'. Below this is a 'Share with Work...' section with instructions to upload receipts. A prominent notification box titled 'You have submitted' contains the text 'Up Next: Check Budget (Financial) for Spend Authorization - Batch/Job: Run Budget Check' and a 'View Details' link. At the bottom, the 'Tasks' section includes two buttons: 'Create Expense Report' and 'Create Spend Authorization'.