



Spend Authorization Guide for SGA Travel Grants

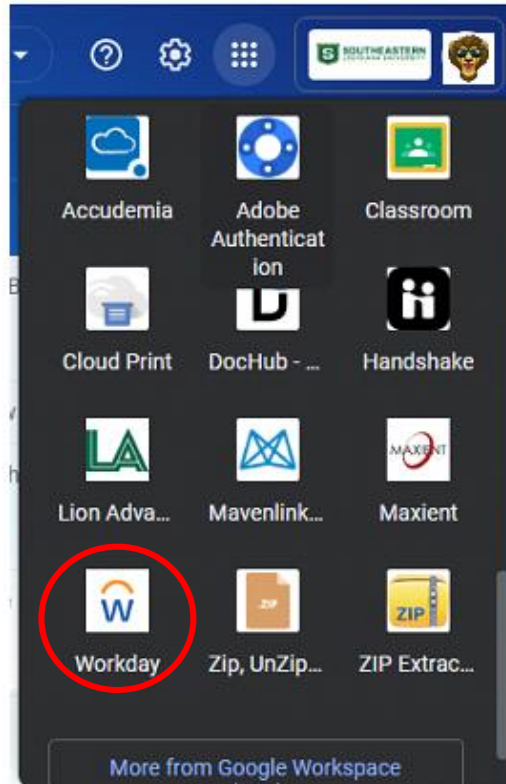
FOR STUDENTS WHO ARE NOT UNIVERSITY EMPLOYEES

This presentation will explain how to enter a Spend Authorization for a student who is not employed by the university and has received a Travel Grant from SGA.

A separate Spend Authorization must be submitted for each student receiving reimbursement through an SGA grant.

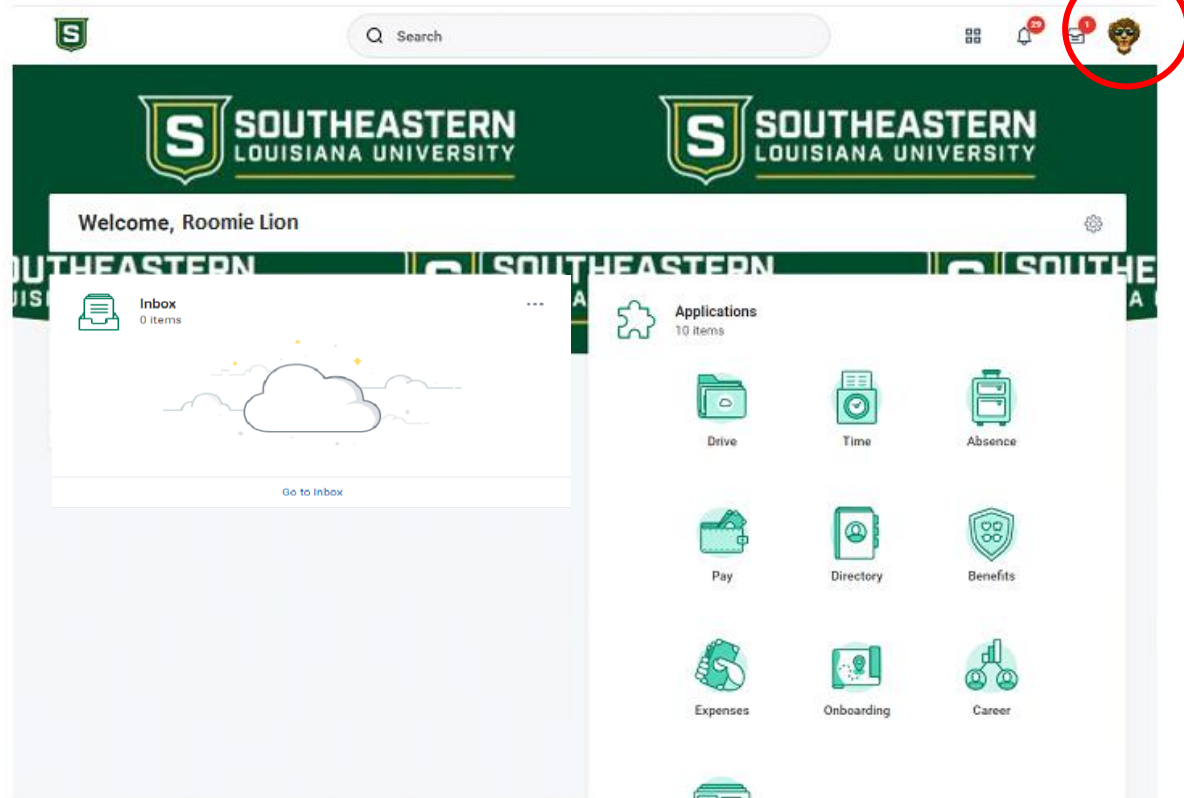
Spend Authorizations must be submitted at least two weeks prior to travel.

Connect to Workday from the Google Apps icon within Gmail.

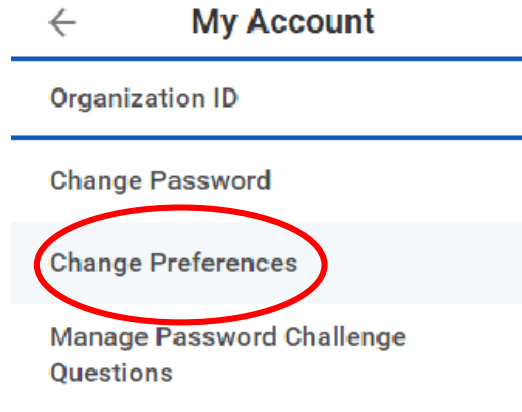
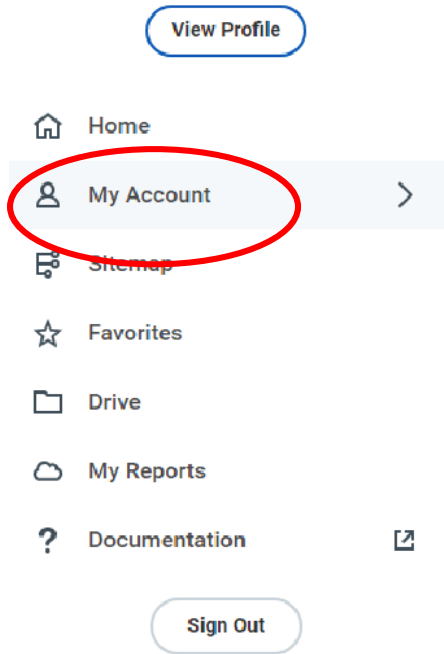


Set your account to be able to view “All of Workday”.

- From the Workday dashboard, click on your profile photo in the upper right corner of the screen.



- Click “My Account”.
- Click “Change Preferences”.



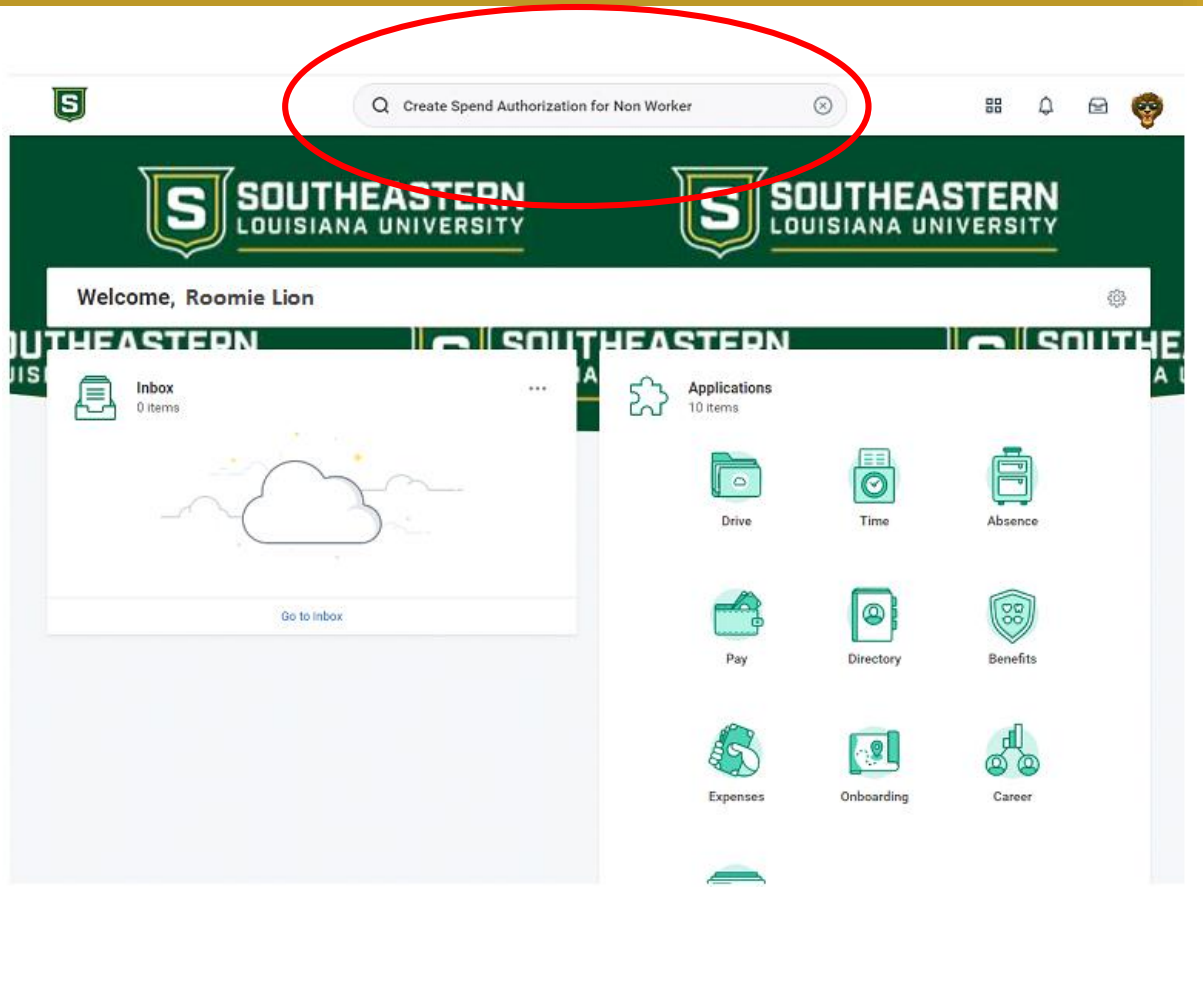
- Under “Search Preferences”, click in the box and select “All of Workday” for the “Preferred Search Category”.
- Click “OK”.
- Click “Done”.

This only needs to be done one time. You do not need to do this step every time you create a spend authorization.

The image shows a 'Global Preferences' dialog box with several sections. The 'Search Preferences' section is circled in red, and the 'OK' button at the bottom is also circled in red. The 'Preferred Search Category' dropdown is set to 'All of Workday'.

Global Preferences	
Default Locale	English (United States) - en_US
Preferred Locale	<input type="text" value="select one"/>
Default Display Language	English
Preferred Display Language	<input type="text" value="select one"/>
Default Timezone	GMT-06:00 Central Time (Chicago)
Default Hour Clock (from Locale)	12 hour
Preferred Hour Clock	<input type="text" value="select one"/>
Default Currency	USD
Preferred Currency	<input type="text"/>
Search Preferences	
Preferred Search Category	<input type="text" value="x All of Workday"/>
Account Preferences	
Mobile Carrier	<input type="text"/>
Preferred Home Page	<input type="text"/>
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

From the Workday Dashboard, click in the search bar, and type “Create Spend Authorization for Non Worker” and press enter.



Click on the link that appears in the results.



Q Create Spend Authorization for Non Worker



Search Results

Categories

Common

Assets

Drive

Expenses

Financial Accounting

...

Search Results 1 items

Tasks and Reports

[Create Spend Authorization for Non-Worker](#)

Tip: try selecting another category from the left to see other results

The first box that appears under “Spend Authorization Information” is “Payee Type”. This should automatically be filled in as “External Committee Member.”

Create Spend Authorization for Non-Worker

Cash Advance Requested 0.00 USD Spend Authorization Total 0.00 USD

▼ Spend Authorization Information

Payee Type *

For

Committee *

Company *

Start Date *

End Date *

Description *

Business Purpose

Currency USD

Spend Authorization Lines

Attachments

+ Add

Viewing:   

Submit

Save for Later

Cancel

▼ Spend Authorization Details

Reimbursement Payment Type *

Justification

In the “For” box, type the student’s name, and press enter.

The “Committee” and “Company” boxes will automatically be filled with the correct information.

Create Spend Authorization for Non-Worker

Cash Advance Requested 0.00 USD Spend Authorization Total 0.00 USD

▼ Spend Authorization Information

Payee Type *

For *

Committee

Company *

Start Date *

End Date *

Description *

Business Purpose

Currency USD

▼ Spend Authorization Details

Reimbursement Payment Type *

Justification

Spend Authorization Lines Attachments

ADD

Submit Save for Later Cancel

Viewing

The “Start Date” will be the day the student departs for travel, and the “End Date” will be the date they return.

In the “Description” box, enter the name of the conference.

In the “Business Purpose” box, select “Travel - Conference.”

Under “Spend Authorization Details”, “Reimbursement Payment Type” is automatically filled in.

For “Justification”, type additional details regarding the reason for travel.

Create Spend Authorization for Non-Worker

Cash Advance Requested 0.00 USD Spend Authorization Total 0.00 USD

▼ Spend Authorization Information

Payee Type *

For *

Committee

Company *

Start Date *

End Date *

Description *

Business Purpose

Currency USD

▼ Spend Authorization Details

Reimbursement Payment Type *

Justification

Spend Authorization Lines Attachments

At the bottom of the page, under “Spend Authorization Lines”, click the “Add” button.

Cash Advance Requested 0.00 USD Spend Authorization Total 0.00 USD

▼ Spend Authorization Information

Payee Type *

For *

Committee

Company *

Start Date *

End Date *

Description *

Business Purpose

Currency USD

▼ Spend Authorization Details

Reimbursement Payment Type *


Justification


Spend Authorization Lines Attachments


+ Add


Viewing:

In the “Expense Item” box, click on “By Expense Item Group”


Spend Authorization Line 

Expense Item * 

Quantity * **By Expense Item Group** 

Per Unit Amount * 


Total Amount *


Budget Date * 


Memo


Cash Advance Requested


Worktags

*Cost Center 


*Fund 


Grant 


Program 


Project 


Then click “Travel”.


Spend Authorization Line 


Expense Item * 


Quantity * **< By Expense Item Group** 

Per Unit Amount * **Athletics Team Travel** 


Total Amount * 


Budget Date * 


Memo * 


Cash Advance Requested * 


Worktags

*Cost Center 

*Fund 

Grant 

Program 

Project 

Click on the appropriate expense item, such as “Conference Registration” or “Hotel.”

For “Quantity” enter “1” for conference registration, the number of nights for hotel stays, or the applicable quantity for other types of expenses.

For “Per Unit Amount” enter the cost of registration, the per night amount for hotels, or the applicable cost for other types of expenses.

The “Total Amount” and “Budget Date” will automatically be filled in.

The screenshot shows a 'Spend Authorization Line' form. At the top left, there is a small table with one row: 'Hotel' with a value of '300.00'. The main form is titled 'Spend Authorization Line' and contains several fields. Three fields are circled in red: 'Expense Item' (with a dropdown menu showing 'Hotel'), 'Quantity' (with the value '2'), and 'Per Unit Amount' (with the value '150.00'). Other fields include 'Total Amount' (300.00), 'Budget Date' (06/06/2022), 'Memo', 'Cash Advance Requested' (checkbox), 'Worktags', '*Cost Center', '*Fund', 'Grant', 'Program', and 'Project'. On the right side, there is an 'Instructional Text' section with three paragraphs of red text providing instructions on reimbursement, destination selection, and documentation requirements. Below the instructional text is an 'Item Details' section with dropdown menus for 'Hotel', 'Arrival Date', 'Departure Date', 'Destination', 'Travel Region', and 'Country'. At the bottom of the form, there are three buttons: 'Submit' (orange), 'Save for Later' (white with grey border), and 'Cancel' (white with grey border).

The “Memo” section is for any necessary additional information.

In the “Cost Center” box, type “81505” and press enter.

The “Fund” and “Function” boxes will automatically be filled in.

Leave the “Grant” box empty.

In the “Program” box, type “81614” and press enter.

Leave “Additional Worktags” empty.

Per Unit Amount	*	150.00	
Total Amount	*	300.00	
Budget Date	*	06/06/2022	
Memo			
Cash Advance Requested	<input type="checkbox"/>		
Worktags			
*Cost Center		x SGA Assistantship ...	
*Fund		x FND028 Restricted (30)	
Grant			
Program		x PRG201023 SGA-Travel Grants (81614)	
Project			
*Function		x FNC028 Student Services (50000)	
Additional Worktags			

The cities listed in the Destination field are the primary cities noted in the PPM 49 lodging allowances table. If you select In-State, Out-of-State, or International for cities not listed, you must add your specific city in the Memo field.

For Conference Hotel overage requests, please also attach the appropriate documentation.

For additional information or to find the most current lodging allowance tables, see page 25 of the [PPM 49](#).

Item Details	
Hotel	<input type="text"/>
Arrival Date	MM/DD/YYYY
Departure Date	MM/DD/YYYY
Destination	<input type="text"/>
Travel Region	<input type="text"/>
Country	<input type="text"/>

Submit

Save for Later

Cancel

If entering an expense item for hotel:

- Click in the “Hotel” box, and choose the appropriate hotel. If the hotel is not listed, type the information into the “Memo” box.
- In the “Arrival Date” box, enter the date the student is checking in to the hotel.
- In the “Departure Date” enter the date the student is checking out of the hotel.
- In the “Destination” box, choose the city the hotel is in, and the “Travel Region” and “Country” boxes will automatically be filled in.

Per Unit Amount	*	150.00
Total Amount	*	300.00
Budget Date	*	06/06/2022
Memo		
Cash Advance Requested		<input type="checkbox"/>
Worktags		
*Cost Center		x SGA Assistantship ...
*Fund		x FND028 Restricted (30) ...
Grant		
Program		x PRG201023 SGA-Travel Grants (81614) ...
Project		
*Function		x FNC028 Student Services (50000) ...
Additional Worktags		

The cities listed in the Destination field are the primary cities noted in the PPM 49 lodging allowances table. If you select In-State, Out-of-State, or International for cities not listed, you must add your specific city in the Memo field.

For Conference Hotel overage requests, please also attach the appropriate documentation.

For additional information or to find the most current lodging allowance tables, see page 25 of the [PPM 49](#).

Item Details

Hotel	x Holiday Inn ...
Arrival Date	06/06/2022
Departure Date	04/08/2022
Destination	x Atlanta, Georgia, United States of America ...
Travel Region	x Georgia
Country	x United States of America

Submit

Save for Later

Cancel

Once you are finished entering the information for the first expense item, click on the “Add” button again to add any other expense items.

Reimbursement

Company * Southeastern Louisiana University

Start Date * 06/06/2022

End Date * 06/08/2022

Description * Mascot Conference

Business Purpose * Travel - Conference

Currency USD

Spend Authorization Lines Attachments

+ Add

Hotel	300.00
Spend Authorization Line	
Expense Item *	x Hotel
Quantity *	2
Per Unit Amount *	150.00
Total Amount *	300.00
Budget Date *	06/06/2022

Instructional Text

Enter the total amount to be reimbursed. An itemized receipt must be attached to expense report.

The cities listed in the Destination field are the primary cities noted in the PPM 49 lodging allowances table. If you select In-State, Out-of-State, or International for cities not listed, you must add your specific city in the Memo field.

For Conference Hotel coverage requests, please also attach the appropriate documentation.

Submit Save for Later Cancel

You will need to attach any supporting documents, such as conference materials, hotel overage form (if applicable), etc.

To do this, click on “Attachments”, which is next to “Spend Authorization Lines” above the “Add” button.

***NOTE - The Hotel Overage Form does not need to have the Spend Authorization number or the last signature to be attached to the Spend Authorization.

However, it will need to have the Spend Authorization number and all signatures when included with the Expense Report, and the hard copy of this needs to be sent to the Travel Office.***

Reimbursement

Company * Southeastern Louisiana University

Start Date * 06/06/2022

End Date * 06/08/2022

Description * Mascot Conference

Business Purpose * Travel - Conference

Currency USD

Spend Authorization Lines Attachments

+ Add Viewing: [icon]

Hotel	300.00
Spend Authorization Line [trash icon]	
Expense Item *	x Hotel
Quantity *	2
Per Unit Amount *	150.00
Total Amount *	300.00
Budget Date *	06/06/2022

Submit Save for Later Cancel

Instructional Text

Enter the total amount to be reimbursed. An itemized receipt must be attached to expense report.

The cities listed in the Destination field are the primary cities noted in the PPM 49 lodging allowances table. If you select In-State, Out-of-State, or International for cities not listed, you must add your specific city in the Memo field.

For Conference Hotel overage requests, please also attach the appropriate documentation.

When you have added all expense item lines and related attachments, click the “Submit” button at the bottom of the screen.

Per Unit Amount	*	150.00	
Total Amount	*	300.00	
Budget Date	*	06/06/2022	
Memo			
Cash Advance Requested		<input type="checkbox"/>	
Worktags			
*Cost Center		x SGA Assistantship ...	
*Fund		x FND028 Restricted (30)	
Grant			
Program		x PRG201023 SGA-Travel Grants (81614)	
Project			
*Function		x FNC028 Student Services (50000)	
Additional Worktags			

The cities listed in the Destination field are the primary cities noted in the PPM 49 lodging allowances table. If you select In-State, Out-of-State, or International for cities not listed, you must add your specific city in the Memo field.

For Conference Hotel coverage requests, please also attach the appropriate documentation.

For additional information or to find the most current lodging allowance tables, see page 25 of the [PPM 49](#).

Item Details

Hotel	x Holiday Inn ...	
Arrival Date	06/06/2022	
Departure Date	04/08/2022	
Destination	x Atlanta, Georgia, United States of America ...	
Travel Region	x Georgia	
Country	x United States of America	

Submit Save for Later Cancel

After you submit the Spend Authorization, please email the Spend Authorization number to the SGA Graduate Assistant (sga@southeastern.edu) and the SGA Advisor (brendan.daigle@southeastern.edu).

If you have any questions, please contact us via the email addresses above, or call us at 985-549-2120.