



# Spend Authorization Guide for SGA Travel Grants

FOR STUDENTS WHO ARE UNIVERSITY EMPLOYEES



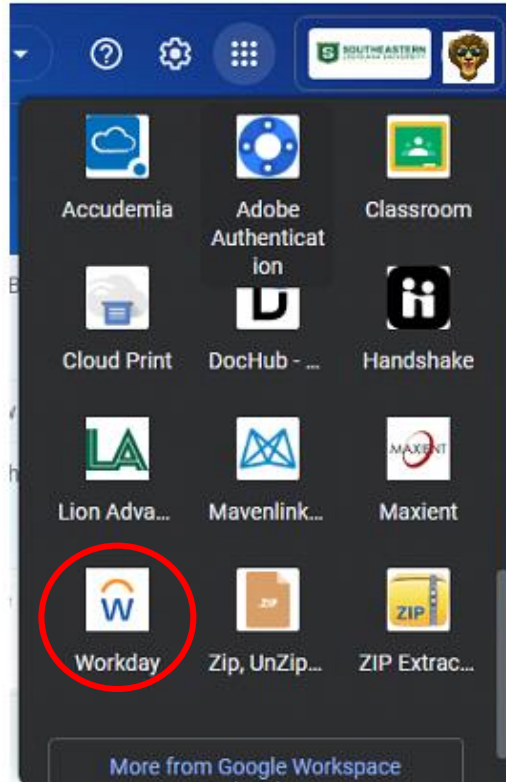
This presentation will explain how to enter a Spend Authorization for a student who is employed by the university and has received a Travel Grant from SGA.

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.

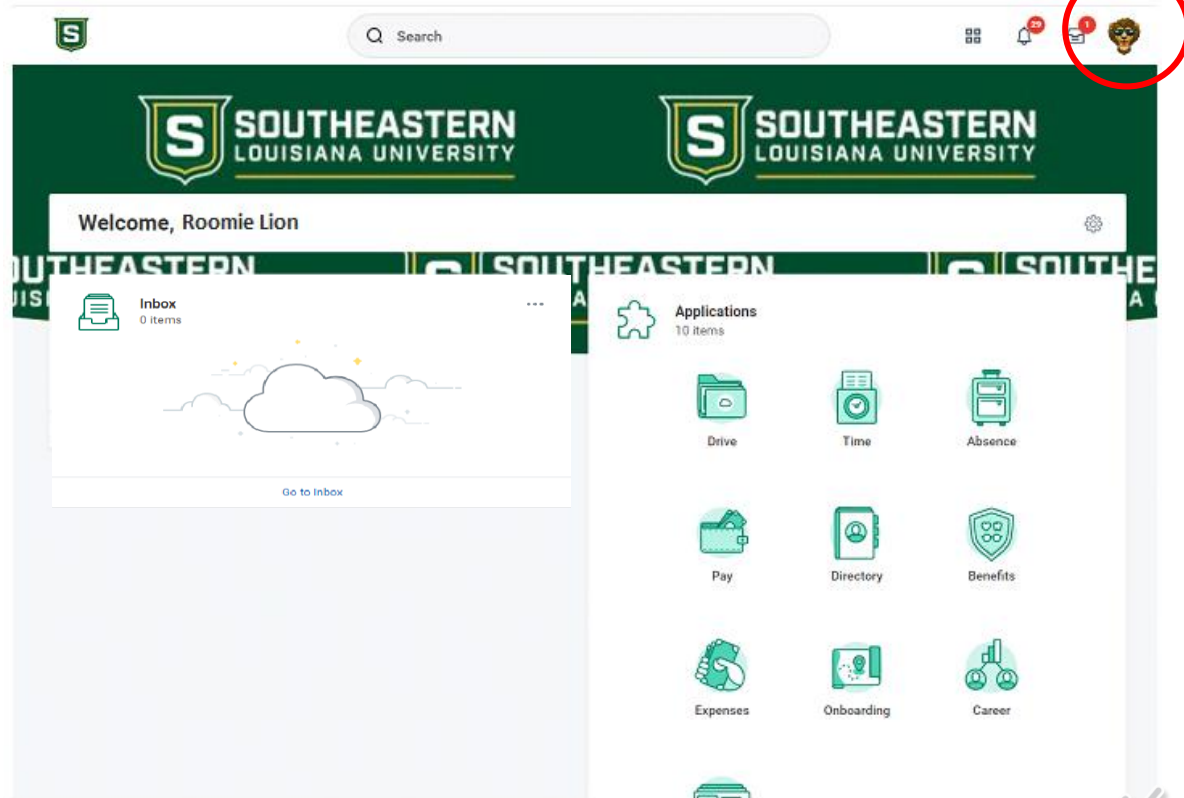


Connect to Workday from the Google Apps icon within Gmail.

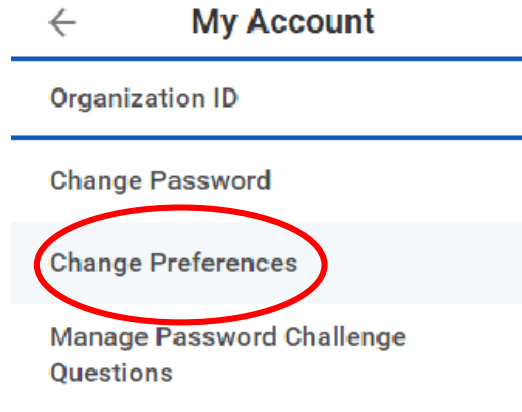
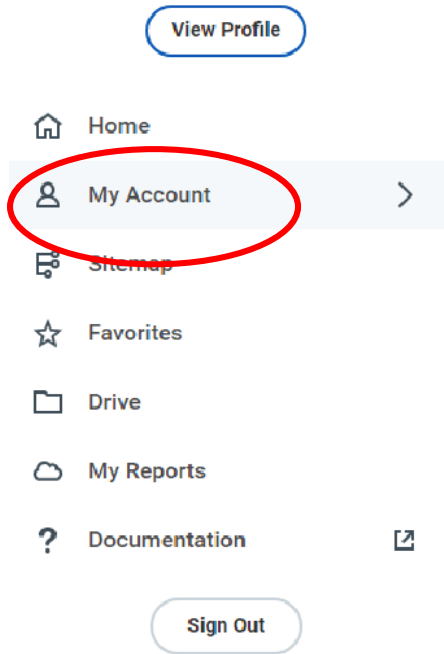


Set your account to be able to view “All of Workday”.

- 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.

**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**

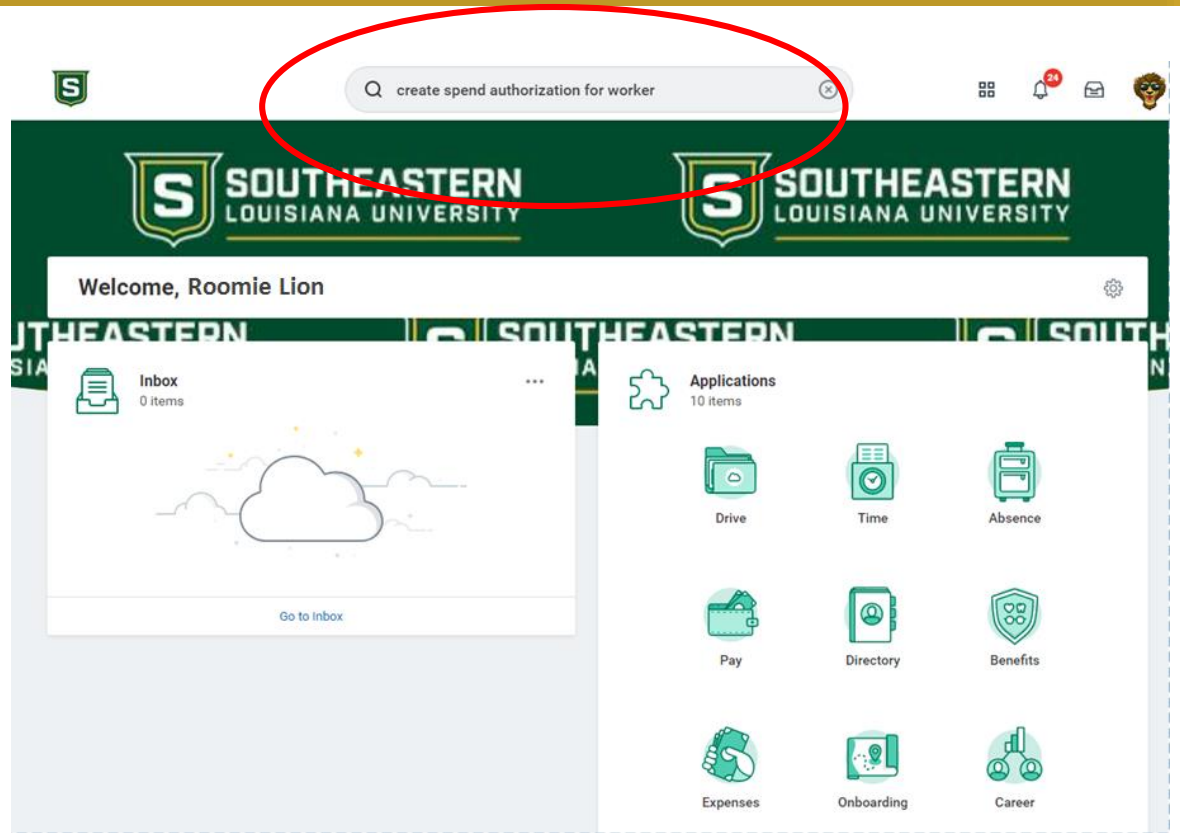
Preferred Search Category	<input type="text" value="x All of Workday"/>
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**Account Preferences**

Mobile Carrier	<input type="text"/>
Preferred Home Page	<input type="text"/>



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



Click on the link that appears in the results.



Q create spend authorization for worker



## Search Results

### Categories

Common

Assets

Drive

Expenses

Financial Accounting

Grants

### Search Results 2 items

Tasks and Reports

[Create Spend Authorization for Worker](#)

[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 “For”. Type the student’s name here and press enter.

The “Company” box will automatically fill.

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 Worker

Cash Advance Requested 0.00 USD      Spend Authorization Total 0.00 USD

#### ▼ Spend Authorization Information

For \*

Company \*

Start Date \*

End Date \*

Description \*

Business Purpose \*

Currency USD

Spend Authorization Lines      Attachments

+ Add

Viewing:

#### ▼ Spend Authorization Details

Reimbursement Payment Type \*

Justification



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

### Create Spend Authorization for Worker

Cash Advance Requested 0.00 USD      Spend Authorization Total 0.00 USD

#### ▼ Spend Authorization Information

For \*

Company \*

Start Date \*

End Date \*

Description \*

Business Purpose

Currency USD

#### ▼ Spend Authorization Details

Reimbursement Payment Type \*

Justification


Spend Authorization Lines      Attachments





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 \*  


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 \* Coaches/Recruiting Travel 


Budget Date \* International Travel 


Memo \* Other Expenses 


Cash Advance Requested \* PCARD Expenses 


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.

⊕ Add Viewing: [icon] [icon]

Spend Authorization Line [trash icon]	
Hotel 300.00	
Expense Item *	[x] Hotel ...
Quantity *	2
Per Unit Amount *	150.00
Total Amount *	300.00
Budget Date *	06/06/2022 [calendar icon]
Memo	
Cash Advance Requested	<input type="checkbox"/>
Worktags	
*Cost Center	
*Fund	
Grant	
Program	
Project	

**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.

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

**Item Details**

Hotel [dropdown]

Arrival Date [MM/DD/YYYY] [calendar icon]

Departure Date [MM/DD/YYYY] [calendar icon]

Destination [dropdown]

Travel Region [dropdown]

Country [dropdown]

**Buttons:** Submit Save for Later Cancel



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
<b>Spend Authorization Line</b>	
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.\*\*\*

The screenshot displays a web application interface for creating a Spend Authorization Line. The top section contains form fields for Reimbursement (dropdown), Company (Southeastern Louisiana University), Start Date (06/06/2022), End Date (06/08/2022), Description (Mascot Conference), Business Purpose (Travel - Conference), and Currency (USD). Below these fields are two tabs: "Spend Authorization Lines" and "Attachments", with the "Attachments" tab circled in red. An "Add" button is located below the tabs. The main area shows a table with one row: "Hotel" with a value of 300.00. To the right of the table is a "Spend Authorization Line" form with fields for Expense Item (Hotel), Quantity (2), Per Unit Amount (150.00), Total Amount (300.00), and Budget Date (06/06/2022). An "Instructional Text" section provides additional instructions: "Enter the total amount to be reimbursed. An itemized receipt must be attached to expense report." and "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." A final instruction states: "For Conference Hotel overage requests, please also attach the appropriate documentation." At the bottom, there are three buttons: "Submit", "Save for Later", and "Cancel".





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](mailto:sga@southeastern.edu)) and the SGA Advisor ([brendan.daigle@southeastern.edu](mailto:brendan.daigle@southeastern.edu)).

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

