Spend Restriction Overview & Instructions

Spend Restrictions

- Define sets of expenditures that are allowed or disallowed by award line based upon sponsor restrictions
- Workday validates spend against these restrictions
- A rule is set to either Allowable or Unallowable
- Restriction can be setup by Object Class Set OR specific Spend Categories, Spend Category Hierarchies, Pay Component Groups
- A default Spend Restriction can be established on Award Header, but optionally overridden on the Line

Three things to know Spend Restrictions:
- Assign either Allowable or Unallowable Spend Restriction to Award Line
- Users will receive an alert warning if they assign both Allowable and Unallowable Spend Restrictions on an Award Line; if they choose to proceed, Workday validates only with the Allowable Spend Restriction
- Users cannot assign a Spend Restriction defined as an Object Class Set that does not match the Object Class Set attached to the Award Line (per the Rate Agreement selected)

- Use the “Award Spend Restriction Audit Report” to verify that transactions are applied accurately
- Use “Find Award Spend Restrictions” report to see those defined
- Task: Create Spend Restriction
Instructions

1. To create a Spend Restriction you can create it in two ways:
   - You can search for ‘Create Spend Restriction’ if you want to create the Spend Restriction first before attaching to the Award Line.
   - Create Spend Restriction while creating an Award Line. (See #2)

2. Navigate to an existing award and do Award>Correct. Scroll down to the Award Line to get the Spend Restriction and click as follows:
3. Create the Spend Restriction in multiple ways (see descriptions on first page). The example below creates a Spend Restriction on the SC0001-Travel-Other Spend Category for Unallowable Costs:

4. Hit OK
5. The Spend Restriction is now included on the Award Line and will prevent any expenses being posted to this Spend Category.

6. Hit Submit to accept the change.