

Review and Approve Expenses

This job aid covers the manager's review and approval process for expenses. Workday allows managers to review and approve team expense reports from one location, increasing efficiency and streamlining the process.

On this job aid:

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View Your Team's Expense Reports

From the Spend Management application (desktop only):



**Spend
Management**

1. Click **My Team's Expense Reports**.

View

My Team's Expense Reports

2. Enter report criteria to filter results.

Find My Team's Expense Reports

Pay To

Report Date On or After

MM / DD / YYYY

Report Date On or Before

MM / DD / YYYY

Document Number

Expense Report Status

Expense Report Number Payment Status

Expense Report Credit Card Payment Status

Created On or After

MM / DD / YYYY

Created On or Before

MM / DD / YYYY

Approved On or After

MM / DD / YYYY

Approved On or Before

MM / DD / YYYY

Filter Name

Manage Filters

Save

OK

Cancel

3. Click **OK**.
4. Note: You can save common expense report search parameters under filters. Just enter a name and click save.


5. Your filters will be available under Saved Filters.

6. Click a report's **Related Actions**  to display available actions or to preview the report.
7. Click the **Expense Report** link to view full report details.

← Find My Team's Expense Reports Actions

33 items

Expense Report	Expense Report Number	Company	Expense Report Sta
Expense Report: EXP-00006700	EXP-00006700	Global Modern Services, Inc. (USA)	Approved
Expense Report: EXP-00006698	EXP-00006698	Global Modern Services, Inc.	In Progress

Expense Report: 00006698 

Expense Report: 00006003

Expense Report: 00006002

Expense Report: 00006001

Expense Report: 00005999

Expense Report: 00005583

Expense Report: 00005532

Actions

- Favorite >
- Integration IDs >
- Reporting >

Expense Report **EXP-00006698**

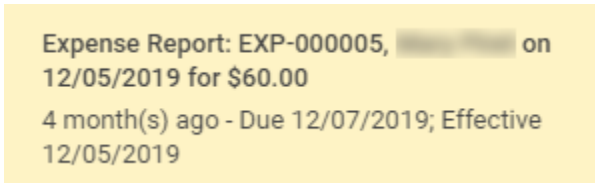
Status	In Progress	Expense Lines 2 items
Pay To	Brian Kaplan	Item
Payee Type	Employee	Taxis / Trains / Shuttles
Company	Global Modern Services,	Meals

Review and Approve an Expense Report

From your Workday Inbox:



1. Under Actions, click the **expense report**.



2. Scroll or expand the view of the expense report to display full report details.

Approve Expense Report
EXP-000005 (edit)

4 month(s) ago - Due 12/07/2019; Effective 12/05/2019

Pay To: Employee Status: In Progress Personal: 0.00 USD Company Paid: 0.00 USD Cash Advance Applied: 0.00 USD Reimbursement: 60.00 USD Total: 60.00 USD

Header Attachments Business Process **Expense Lines**

1 Item

Thu, Dec 5

Airfare 60.00 USD

Expense Line

Date: 12/05/2019
Expense Item: Airfare
Quantity: 1
Per Unit Amount: 60.00
Total Amount: 60.00
Currency: USD
Memo: (empty)
*Cost Center: [redacted]
Program: [redacted]
Project: [redacted]
Gift: [redacted]
Grant: [redacted]
*Additional Worktags: [redacted]

Item Details

Arrival Date: 12/05/2019
Departure Date: 12/06/2019
Origination: Orlando, Florida, United States of America
Destination: Washington, DC, District of Columbia, United States of America

Attachments from File

word.docx
Uploaded by: [redacted] 4 months ago
Comment: (empty)

Receipt Included: Yes

Approve Send Back Add Approvers ...

3. Complete the review and select one of the following actions:

Personal Expense No

Approve Send Back Add Approvers ...

- Approve
- Send Back (requires comment)
- Add Approvers
- More ...
 - Deny
 - Close

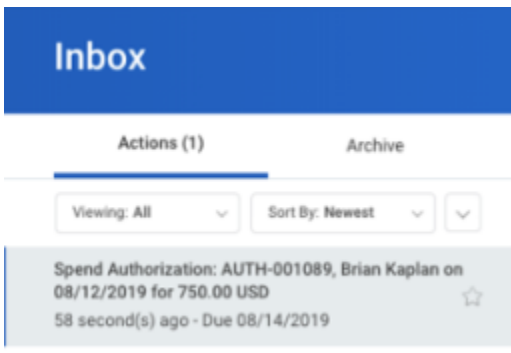
Note

You can review expense report receipts for each expense line on the **Attachments from File** area, below **Item Details**.

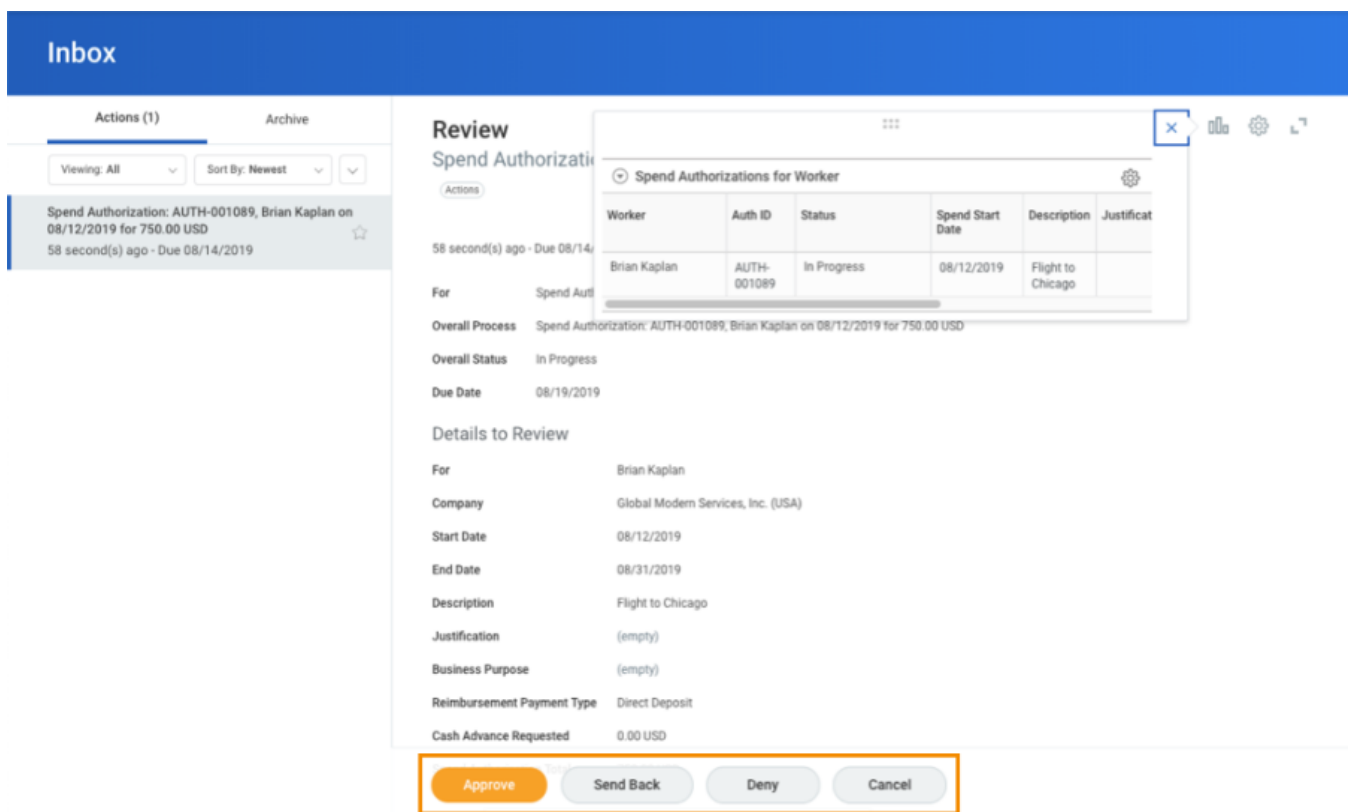
Review and Manage Spend Authorizations

From the Home page:

1. Click your **Inbox** icon.
2. Click the **Spend Authorization** approval task.



3. Review the spend authorization details.
4. Select **Approve**, **Send Back**, **Deny**, or **Cancel**.

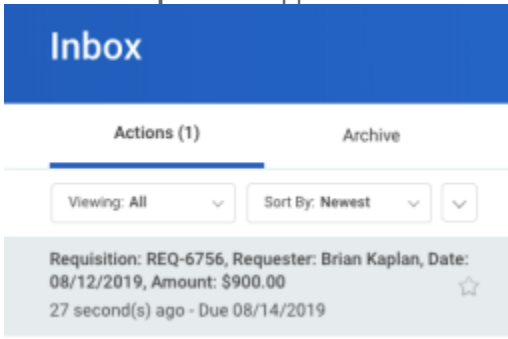


Review and Manage Requisitions (Procurement Requests)

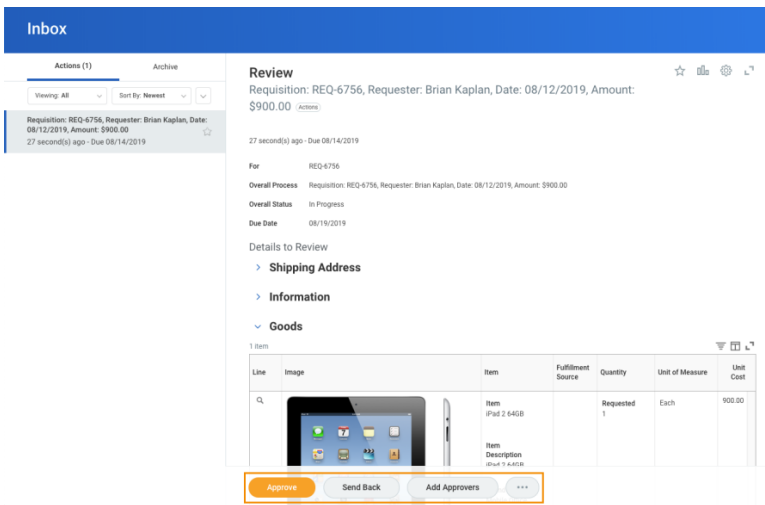
From the Home page:

1. Click your **Inbox** icon

2. Click the **Requisition** approval task.



3. Review the procurement request details.



4. Select **Approve**, **Send Back** or **Add Approvers**. You can also select **Deny** or **Cancel** from the More button.

