Mobile

Enter Expense and Submit Expense Report

iPhone

Use the Expenses worklet (card) to track expenses, upload receipts, and submit expense reports.

**Note:** Ensure you have installed the Workday application. For instructions on how to install the Workday app, please see reference aid **Getting Started: Using Your Mobile Device**

Login to Workday application

From the Home Page, click Expenses worklet

1. Tap **New Expense**.



1. Tap the **Camera** icon to take a photo of the receipt. For an iPhone, you can also choose an existing photo or import an attachment. For an Android, you can also select an existing photo from the gallery. If you took a photo, tap **Use Photo**.
2. Date should default to today’s date, enter an Amount and Expense Item. **Recommended:** Include a memo to assist in completing your expense report at a later date.

Note: An icon of the image should appear indicating your photo was successfully added to your expense item.



1. Tap **Done**.

Repeat previous steps to add any other expense items you want to report.

When all expense items are added, you can add all expense items and submit an expense report using two options:

**Option A**

**1.** After adding your last expense, click **Select All** on the top of your mobile screen.

**2.** Total items will appear at the bottom, click **Add to Report**.

**3.** You can select to **Create New Report** or select **Existing Report**

**4.** Your items will be added and ready for review. Tap on **# item – Review.**

**5.** Click **Submit**

**Option B**

**1.** Back arrow to previous page

**2**. Tap **New Expense Report**.

**3.** Add Memo, Company, Expense Report Date and Cost Center should default.

**4.** Tap the **Additional Worktags** prompt. Add information your organization may require, like Program, Project, Grant or Gift.

1. Once you’ve completed the expense report information, tap **Done**.
2. Tap **Add Expense** to attach expenses to the report.
3. Tap **Existing Expenses**. You can also choose to add more expenses in this step by tapping **New Expense**.
4. Choose the pre-existing expenses you want to include in the report by tapping the **checkmark** next to each expense item you have saved.
5. Tap **Done**.
6. Tap **Review**.
7. Review your expense items for accuracy and correct any errors, then tap **Submit**. A confirmation screen shows your expense report has been routed for approval.



IOS iPad

Use the Expenses worklet (card) to track expenses, upload receipts, and submit expense reports.

From the Expenses card:

1. Tap **New Expense**.
2. Tap the **Camera** icon to take a photo or choose an existing photo of your receipt.
3. Enter an Amount, Date, and any other supporting information for the expense.
4. Tap **Done**.

Repeat previous steps to add any other expense items you want to report. When all expense items are added, you can submit an expense report from the Expense worklet or tap on **Add to Report**

1. Using the worklet, tap **New Expense Report**.
2. Include the Company and Cost Center (if not already defaulted)
3. Tap the **Additional Worktags** prompt. Add information your organization may require like Project, Program, Grant or Gift.
4. Tap **Done**.
5. Swipe right to tap **Add Expense**.
6. Tap **Existing Expenses**. You can also choose to add more expenses in this step by tapping **New Expense**.
7. Choose the pre-existing expenses you want to include in the report by tapping the **checkmark** next to each expense item you have saved.
8. Tap **Done**.
9. Tap **Review**.
10. Review your expense items for accuracy and correct any errors, then tap **Submit**. A confirmation screen shows your expense report has been routed for approval.