



Find Expense Reports: Expense Initiators

Expense Initiators can utilize the Find Expense Reports report to quickly check statuses of expense reports they have created. Filters can be applied on the report to filter by the employee being reimbursed (Pay To Employee) or by who created the expense report (Created by Worker). Follow the steps below to run this report.

From the Workday Home Page:

1. Type **My Expense Reports** in the Search Bar and select the **My Expense Reports Report**.
2. Select **Find Expense Reports**.
3. Fill in the **appropriate fields**. **Company** is required. It is recommended to filter by the employee being reimbursed (Pay To Employee) or by your own name (Created by Worker). Select **OK**.
4. A report will appear with a list of Expense Reports including status and who the Expense Report was paid to. Clicking the **Expense Report link** in the first column will allow you to view the expense line details.
5. Use the Related Actions button to change the expense report.

Note: if a report is sent back to you, it can be found in your **Workday Inbox**.

The screenshot illustrates the process of finding and viewing expense reports in Workday. It is divided into five numbered steps:

- Step 1:** A search bar at the top of the page contains the text "My Expense Reports". Below the search bar, a dropdown menu shows "My Expense Reports Report" with a green circle '1' next to it.
- Step 2:** The "My Expense Reports" page is displayed for user Anita Knapp (0123456). It features two buttons: "Create Expense Report" and "Find Expense Reports", with a green circle '2' next to the latter.
- Step 3:** The "Find Expense Reports" filter form is shown. Fields include "Company", "Pay To" (set to "Walter Mellon"), "Payee Type", "Report Date On or After", "Report Date On or Before", "Supplier for Contingent Worker", "Corporate Credit Card Accounts for Expense Report", "Document Number", "Expense Report Status", "Expense Report Worker Payment Status", "Expense Report Credit Card Payment Status", and "Created by Worker" (set to "Anita Knapp"). The "OK" button has a green circle '3' next to it.
- Step 4:** The resulting "Find Expense Reports" table is shown. It lists 5 items with columns for Expense Report, Expense Report Number, Company, Expense Report Status, Pay To, Payee Type, Expense Report Date, Memo, Total Amount, and Currency. A green circle '4' is placed above the table.
- Step 5:** A detailed view of an expense report (EXP-00028705) is shown. A dropdown menu is open over the "Actions" column, with options: "Expense Report", "Cancel", "Change", "Copy", and "Print". A green circle '5' is placed next to the "Change" option.

QUESTIONS?

Please email businesseducation@vumc.org