



Approve an Expense Report

Managers are responsible for approving the expense reports of their direct reports. Workday allows managers to review and approve team expense reports from one location, increasing efficiency and streamlining the process. Follow the steps below to complete the approval process for expenses, including viewing report attachments.

VIEW REPORT ATTACHMENTS

From the Expense Report:

1. **Expand** the report to display full report details.
2. Select any **attachments** to review itemizations.

Note: Always review the attached receipt to ensure the item lines on the receipts match the reported itemizations, including the receipt total.

Approve Expense Report
EXP-0000167 Training Conference

Pay To
Employee: Anita Knapp

Status	Waiting on Manager	Personal	20.00 USD
Prior Balance Applied	0.00 USD		
Reimbursement	480.00 USD	Total	500.00 USD

EXP-0000167 Training Conference

Anita Knapp Receipt.png
Uploaded by Anita Knapp

Comment (empty)

APPROVE AN EXPENSE REPORT

From your Workday Inbox:

1. Select the **expense report** you want to approve.
2. Scroll or **expand** the expense report to display full report details, including any receipt copies.
3. Complete the review and select **Approve**.

Note: In addition to **Approve**, you also have the ability to **Send Back**, and **Add Approvers**.

Additionally, select the **More** icon to **Save for Later**, **Close**, or **Deny**.

**If a report is denied, the process stops and the employee will need to start the report from the beginning.*

Inbox

Actions Archive

Viewing: All Sort By: Newest

Expense Report: EXP-0000167, Anita Knapp (8675309) on 04/05/2022 for \$500.00
1 hour(s) ago - Due 04/08/2022; Effective 04/05/2022

Approve Expense Report
EXP-0000167 Training Conference

Pay To
Employee: Anita Knapp

Status	Waiting on Manager	Personal	20.00 USD
Prior Balance Applied	0.00 USD		
Reimbursement	480.00 USD	Total	500.00 USD

Send Back Approve

QUESTIONS?

Please email BusinessEducation@vumc.org.



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Workday allows managers to review and approve team expense reports from one location, increasing efficiency and streamlining the process. If additional reviewers are needed on an expense report, managers can add other approvers to the review process. Follow the steps below to forward review of a report and view your team’s expense reports.

FORWARD REVIEW OF AN EXPENSE REPORT

From your Workday Inbox:

1. Select the **expense report** you want to forward.
2. Select the **More** icon.
3. Choose **Add Approvers**.
4. From the **pop-up window**, search for **Additional Approvers** and add any **Comments**.
5. Select **Submit**.

The screenshot shows the 'Inbox' section with an expense report entry: 'Expense Report: EXP-0000167, Anita Knapp (8675309) on 04/05/2022 for \$500.00'. A red circle '1' highlights the report. A red circle '2' highlights the 'More' icon. A red circle '3' highlights the 'Add Approvers' button in the 'Approve Expense Report' pop-up. A red circle '4' highlights the search field in the 'Add Approvers' dialog. A red circle '5' highlights the 'Submit' button in the 'Add Approvers' dialog.

VIEW YOUR TEAM’S EXPENSE REPORTS

From the Spend Management application (desktop only):

1. Select **My Team’s Expense Reports**.
2. Enter report **criteria** to filter results (optional).
3. Select **OK**.
4. Select the **Expense Report** link to view full report details.

The screenshot shows the 'Spend Management' application. A red circle '1' highlights the 'My Team's Expense Reports' link. A red circle '2' highlights the 'Document Number' field in the filter dialog. A red circle '3' highlights the 'OK' button in the filter dialog. A red circle '4' highlights the 'Expense Report' link in the table below.

Expense Report	Expense Report Number	Company	Expense Report Status	Pay To
Expense Report: EXP-0000171	EXP-0000171	Vanderbilt University Medical Center	Draft	Rose Bush
Expense Report: EXP-0000170	EXP-0000170	Vanderbilt University Medical Center	In Progress	Anita Knapp
Expense Report: EXP-0000169	EXP-0000169	Vanderbilt University Medical Center	Draft	Jack Pott

QUESTIONS?

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