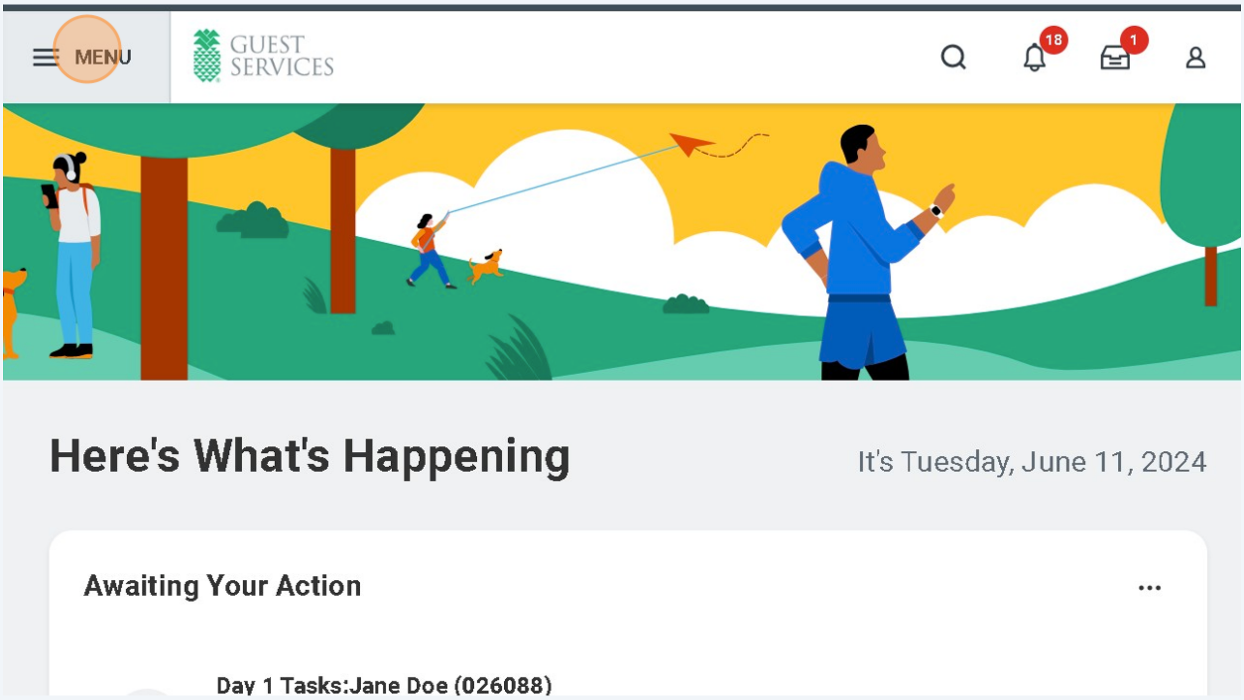
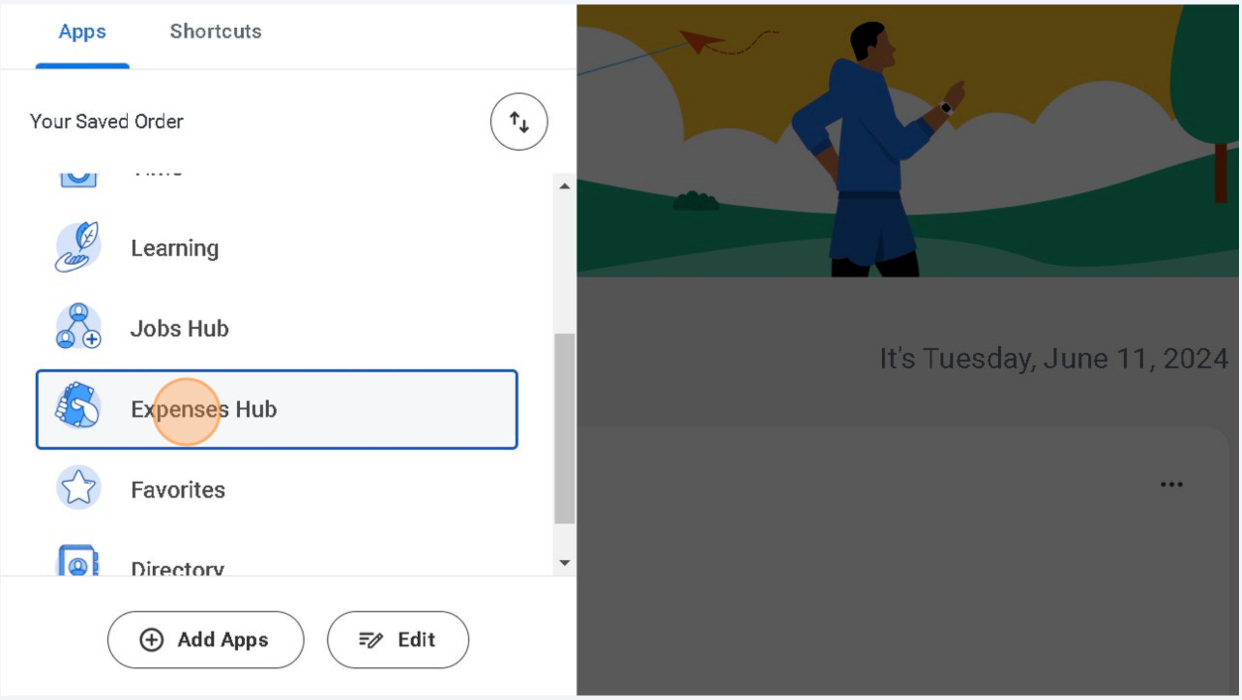
Create Expense Report for Reimbursement

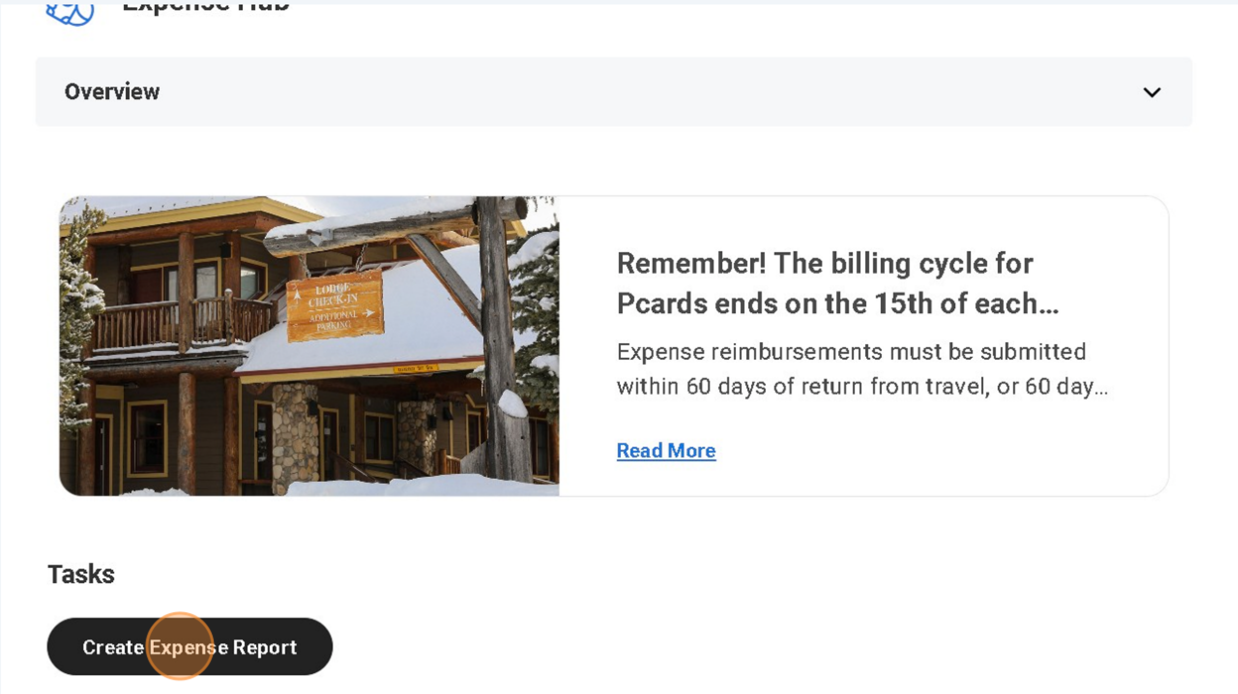
1 In order to create an expense report for reimbursement, click "MENU."



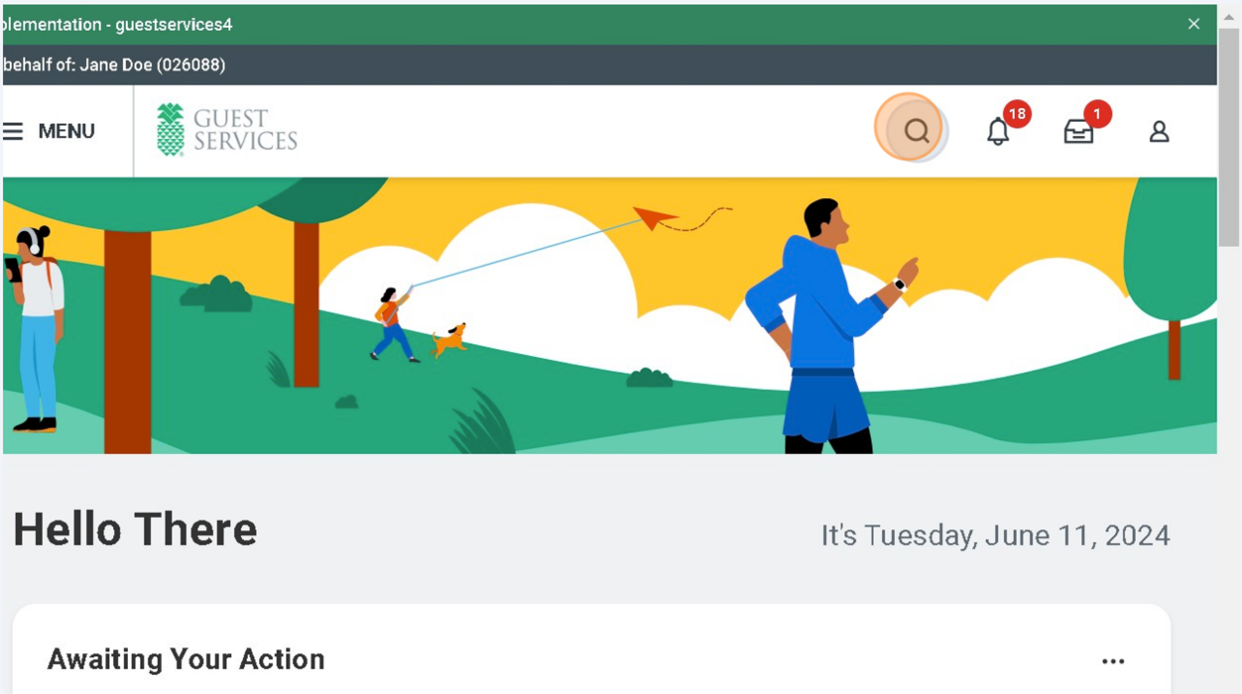
2 Fromm there, click "Expenses Hub."



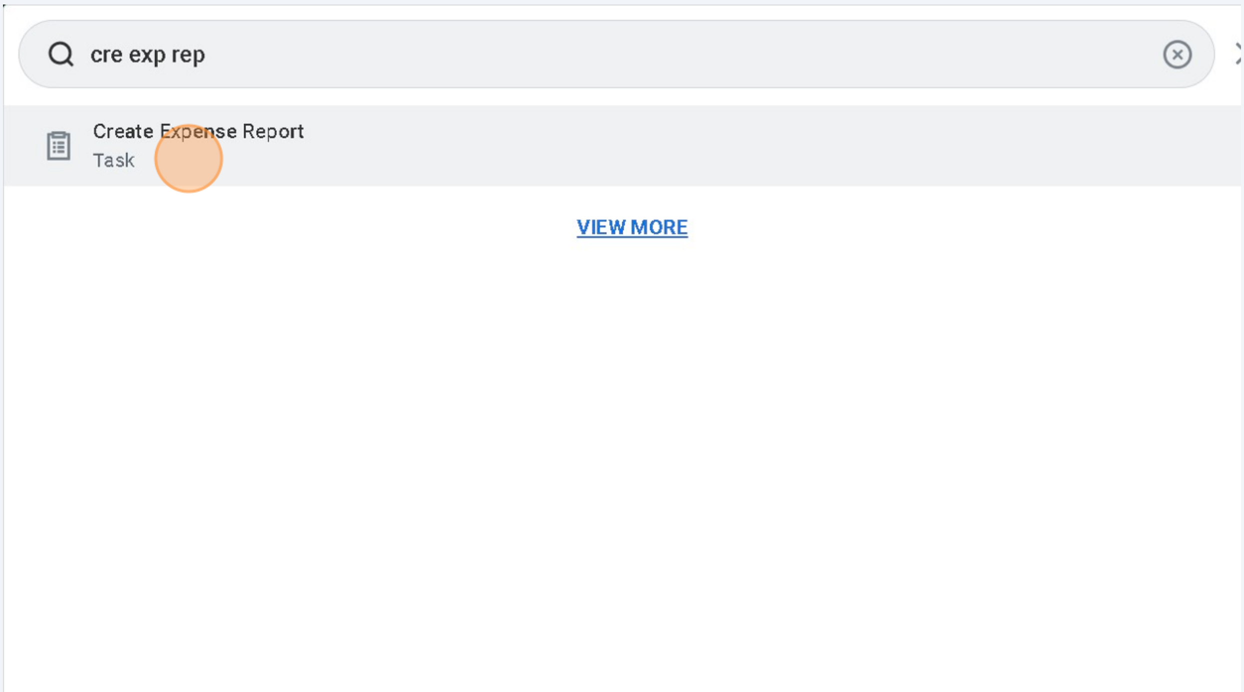
3 Click "Create Expense Report."



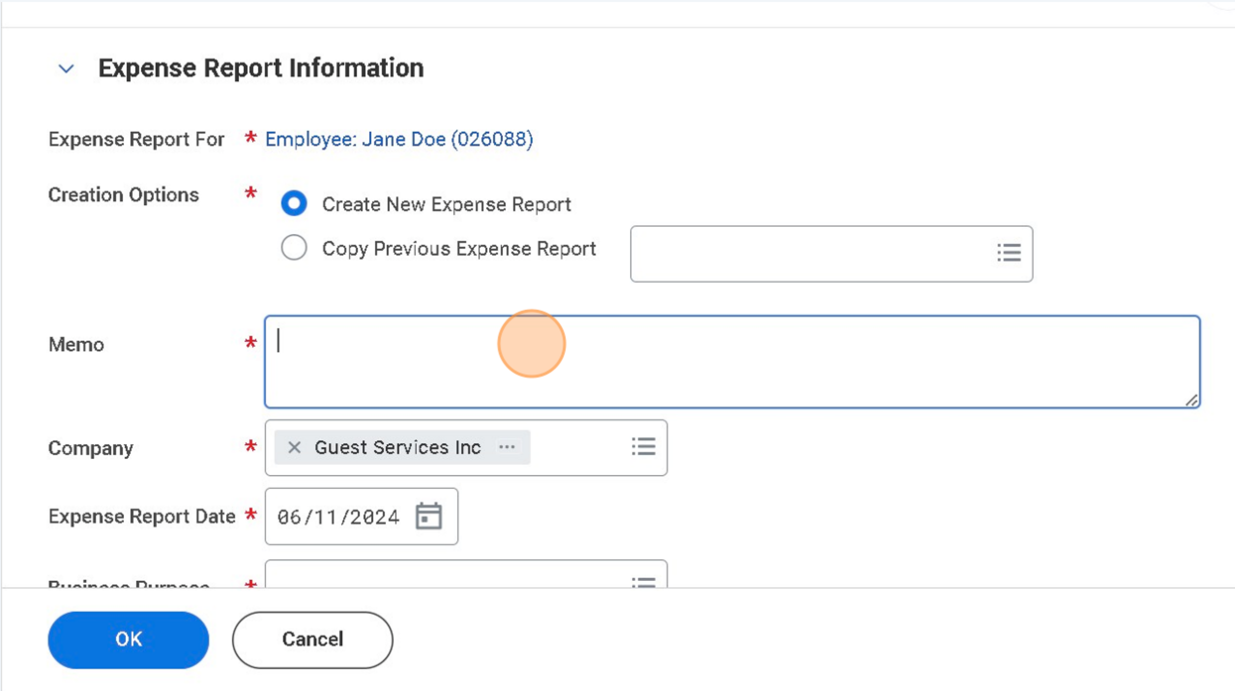
4 Another way to get to the Create Expense Report task is to use the search bar.



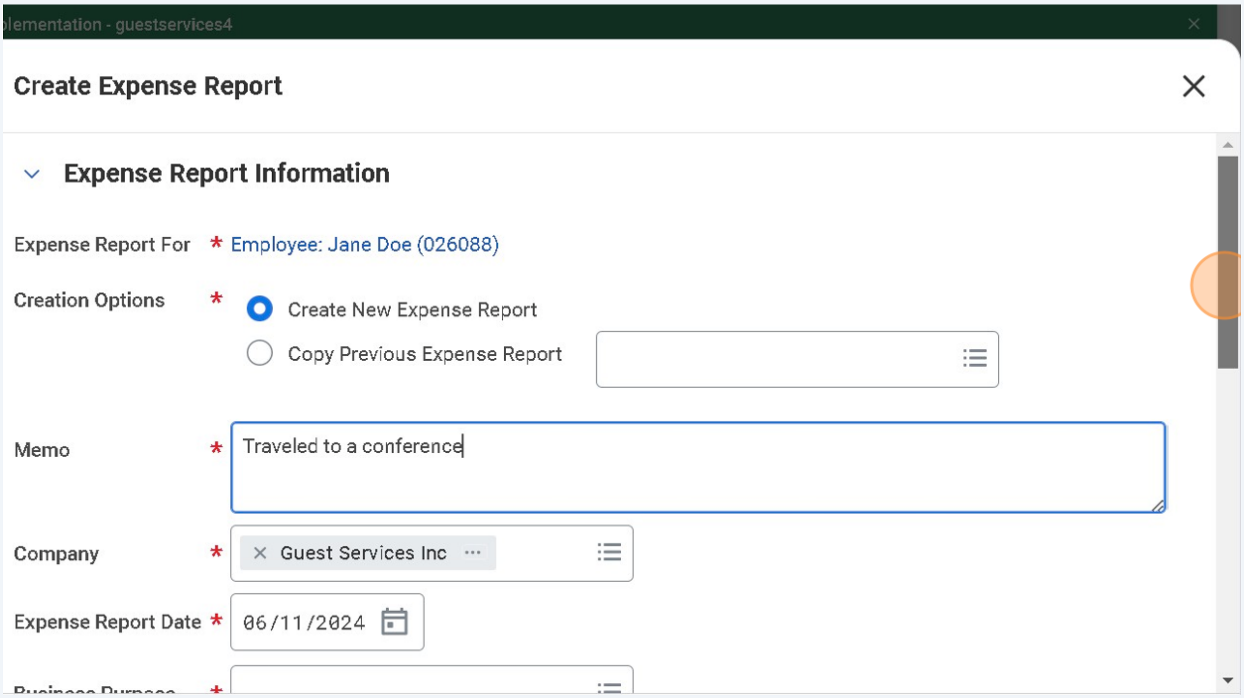
5 Workday only needs the first few letters of each word in the search bar to find the task.



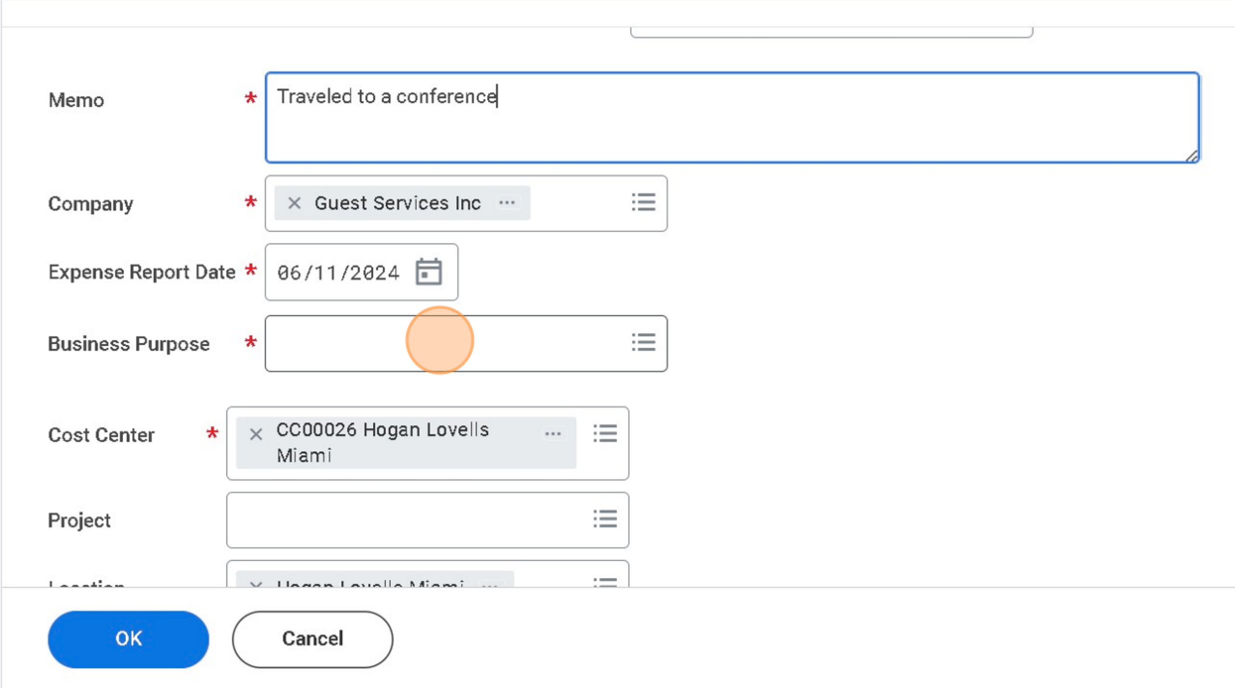
6 The expense report page will then appear. Fill out all required information. You can create a new expense report, or copy one you have previously created. The option to copy a previous expense report is helpful when you have similar expenses on your new report as you had on an old one because you have the ability to change details such as the dates, amounts, or receipt images.



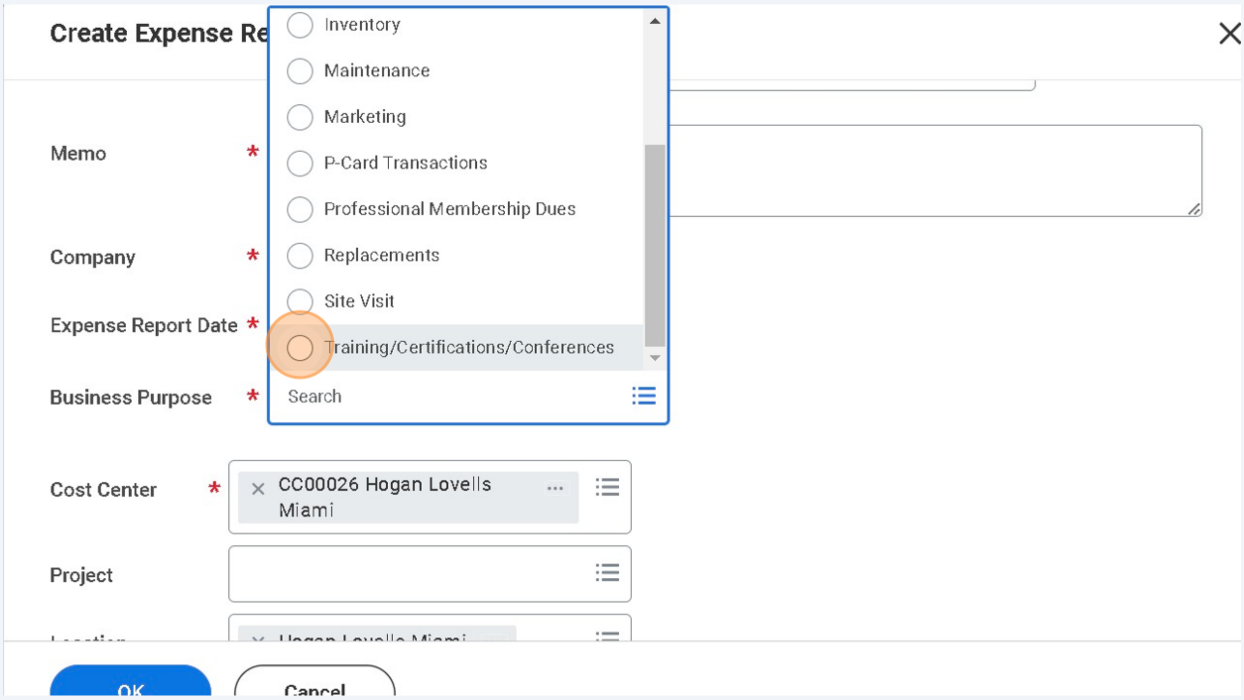
7 Enter the reason for your expense report in the memo box.



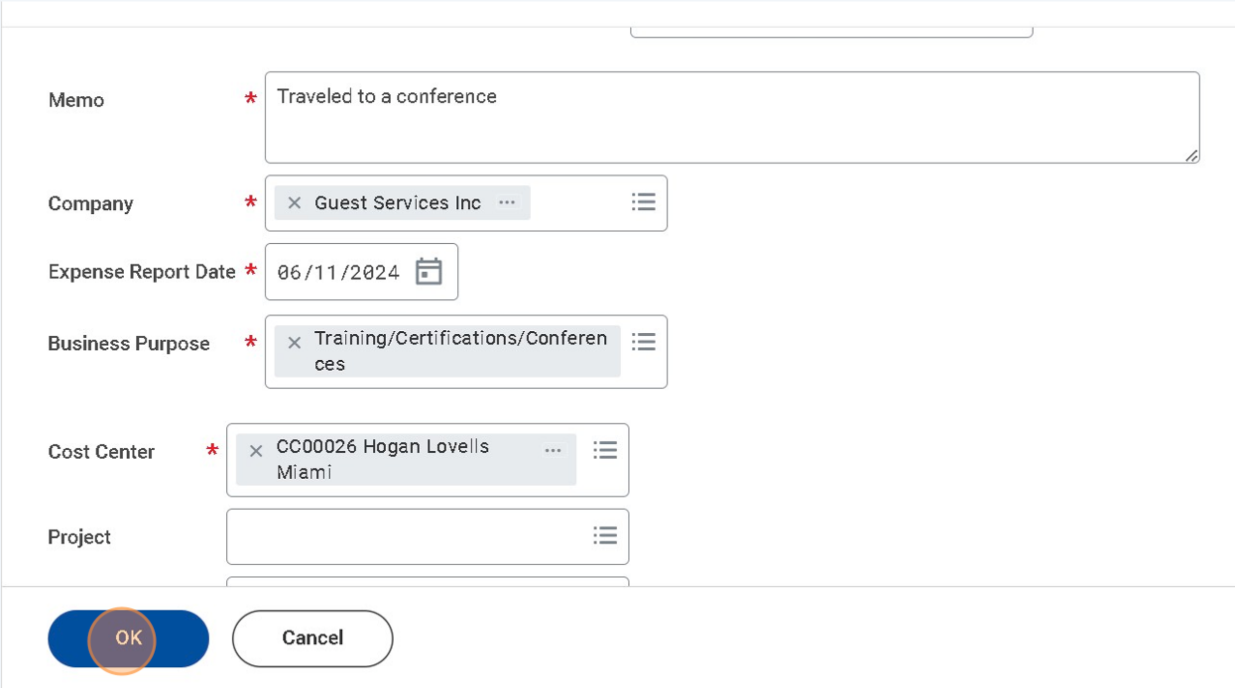
8 Click the "Business Purpose" field and select the category that best applies to your expense report.



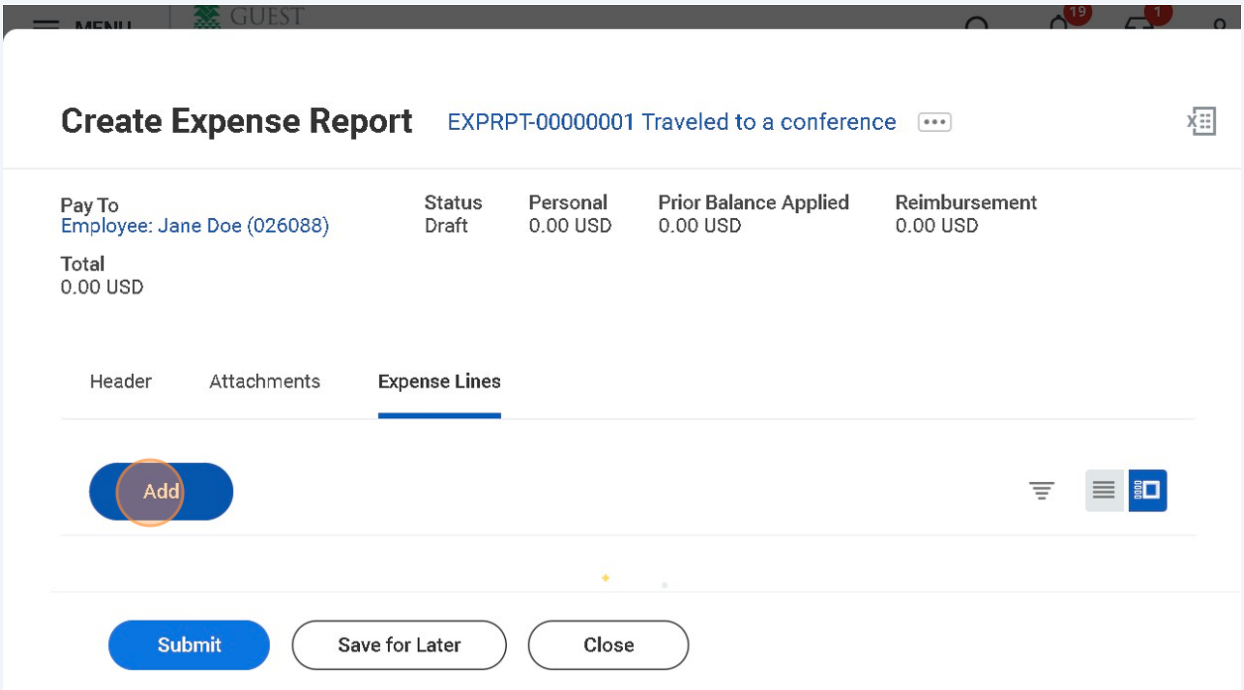
9 Do not select "P-Card Transactions" when making an expense report for reimbursements. If you have both P-card transactions and expense reimbursements, submit them on separate reports.



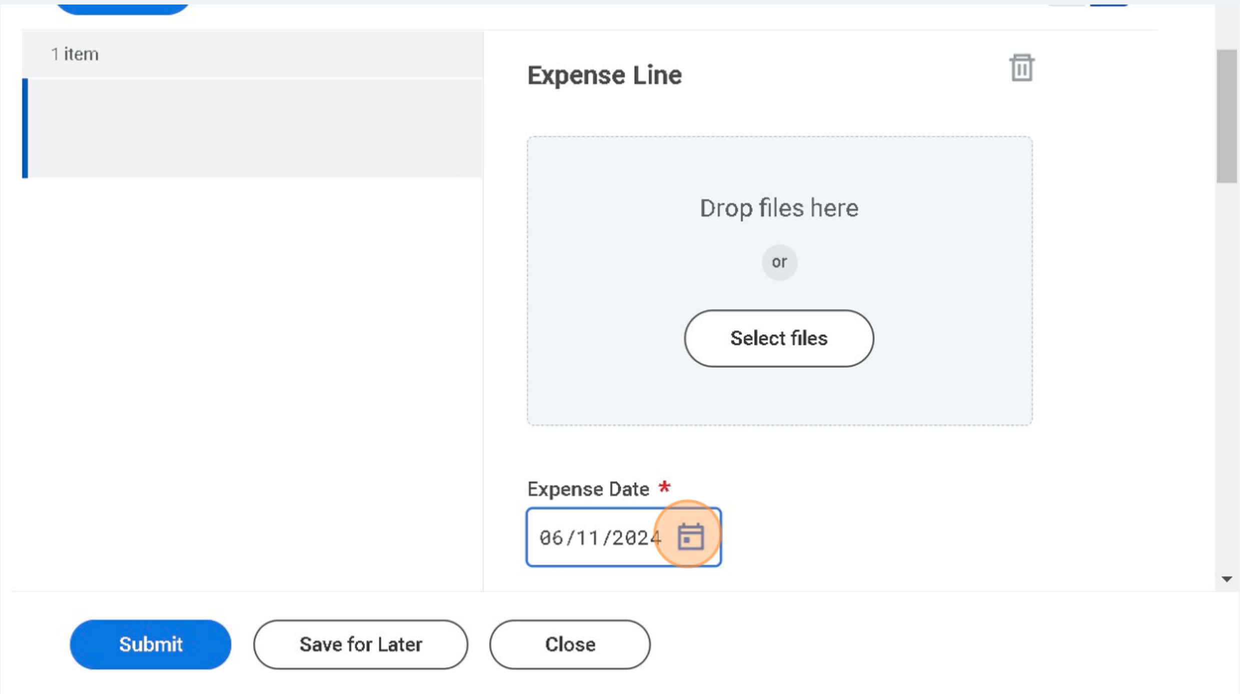
10 Click "OK"



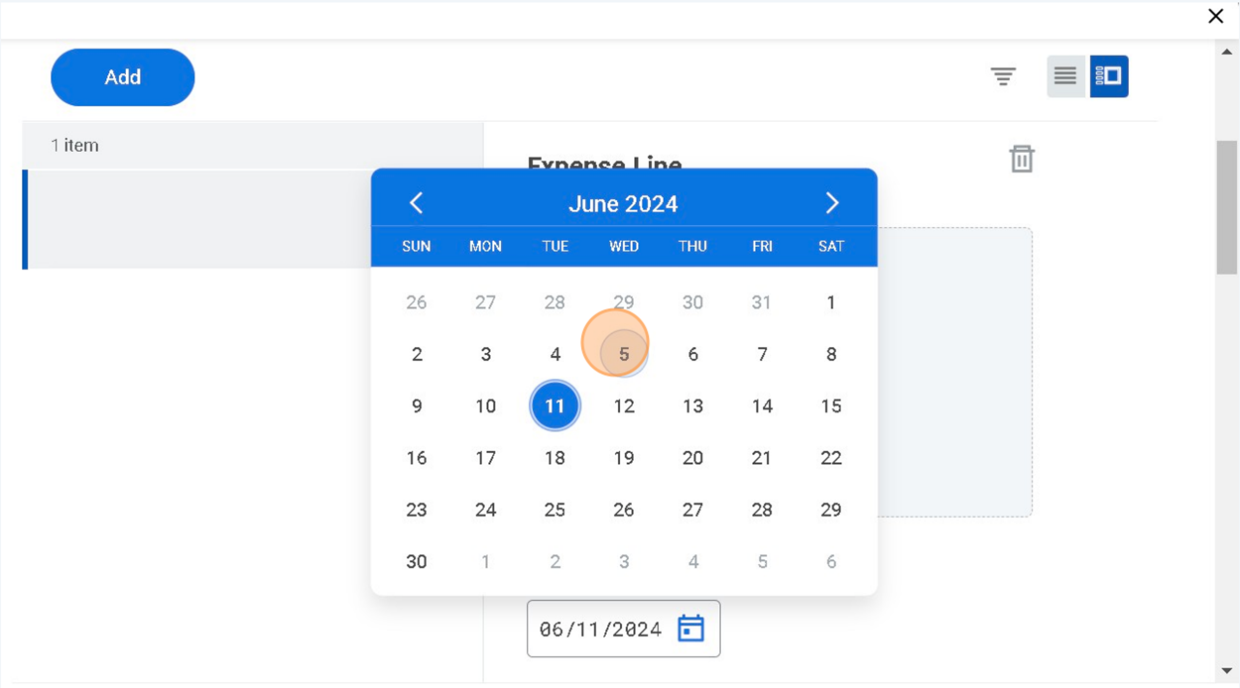
11 Click "Add"



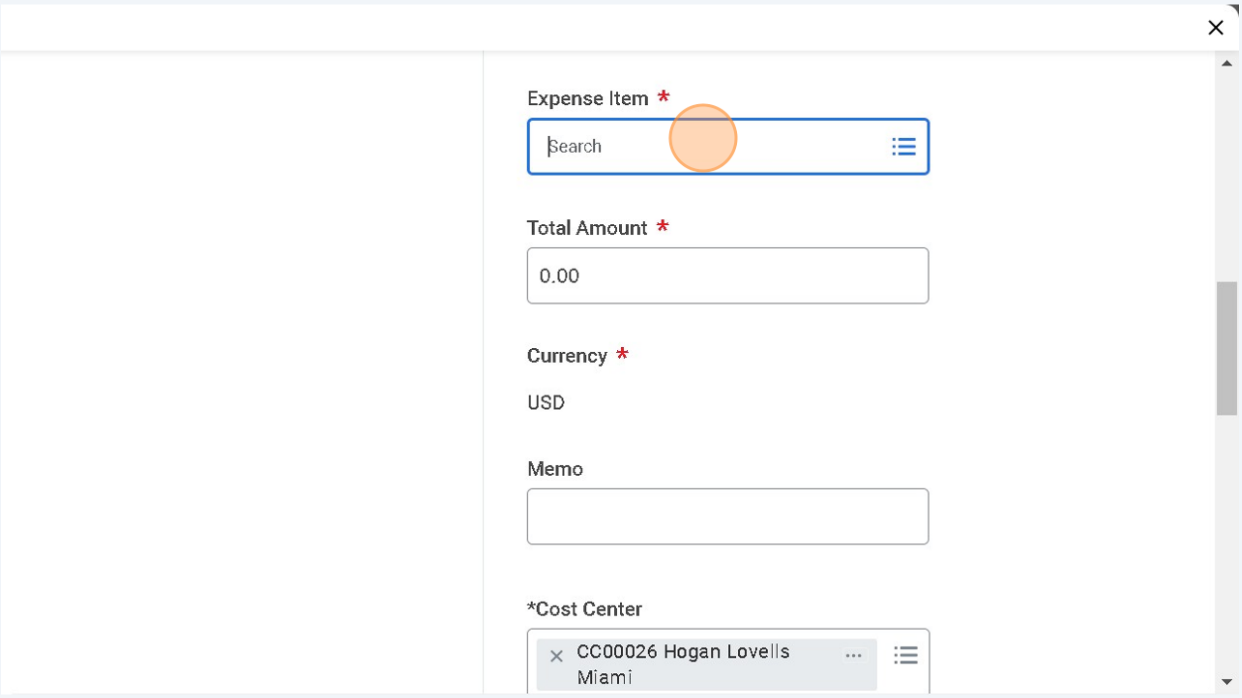
12 Use the files section to add the image of your receipt, then check the expense date to make sure it matches the date on the receipt.



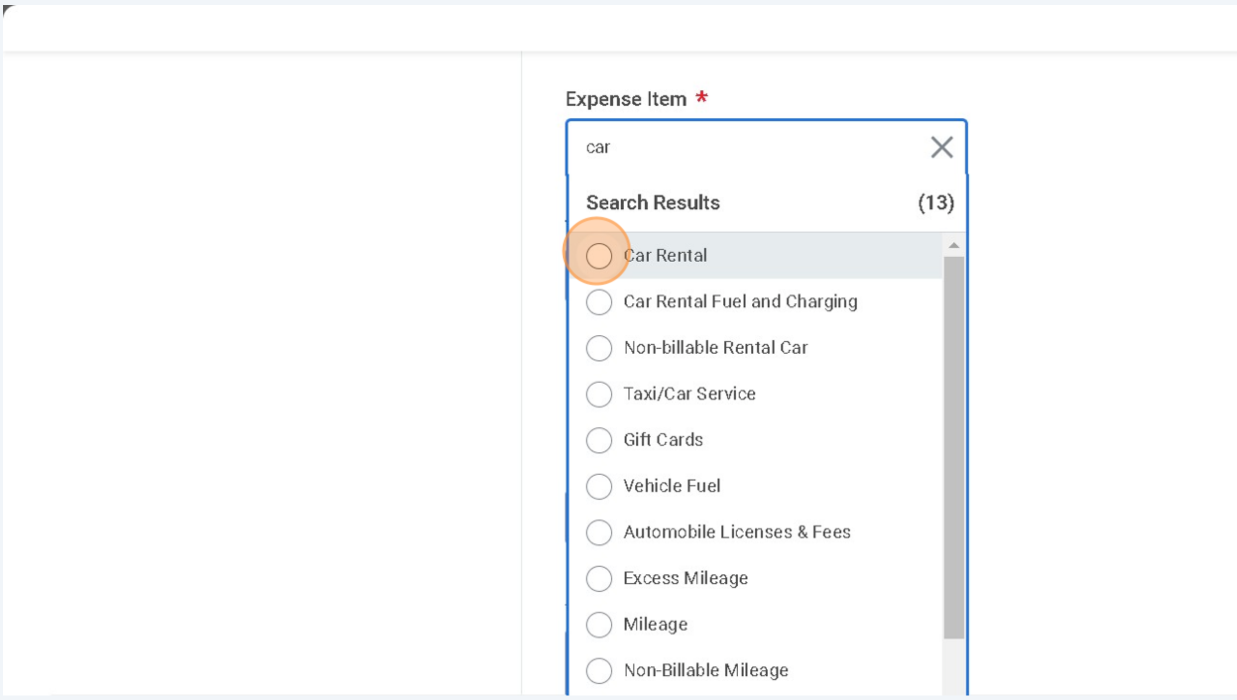
13 The expense date will default to the current date. If the expense was made on a different date, either type in the correct date, or click on the calendar icon to search for the date.



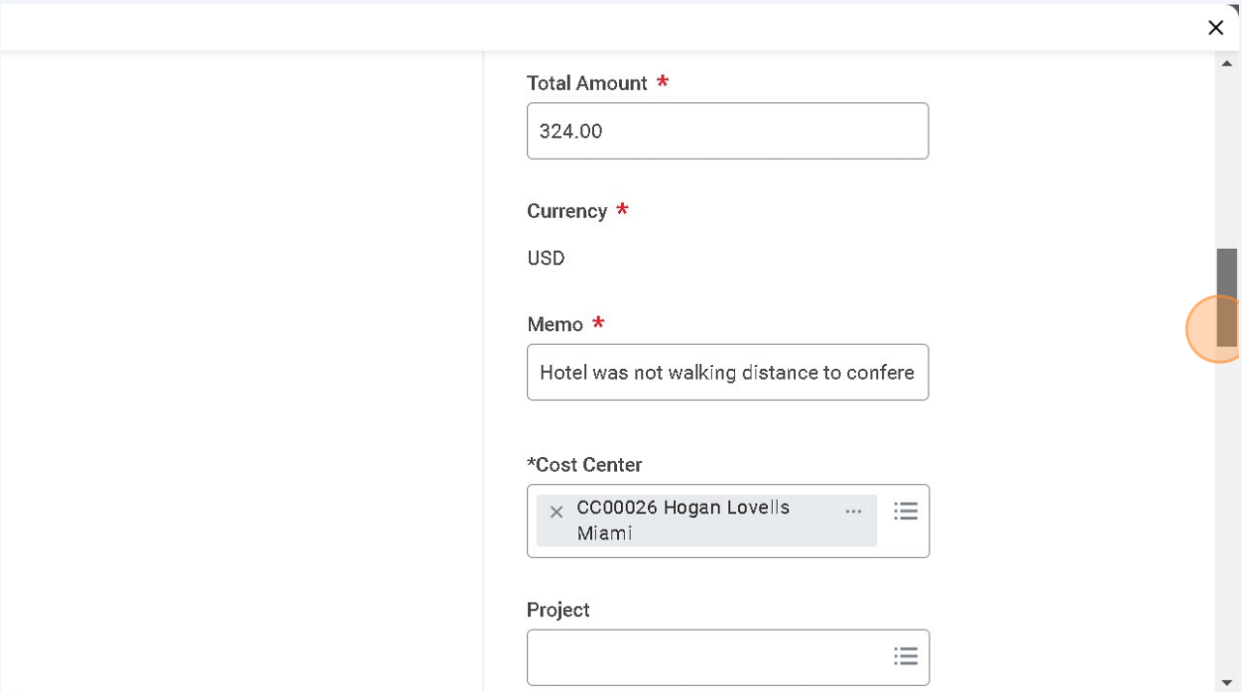
14 Next, click the "Expense Item" field.



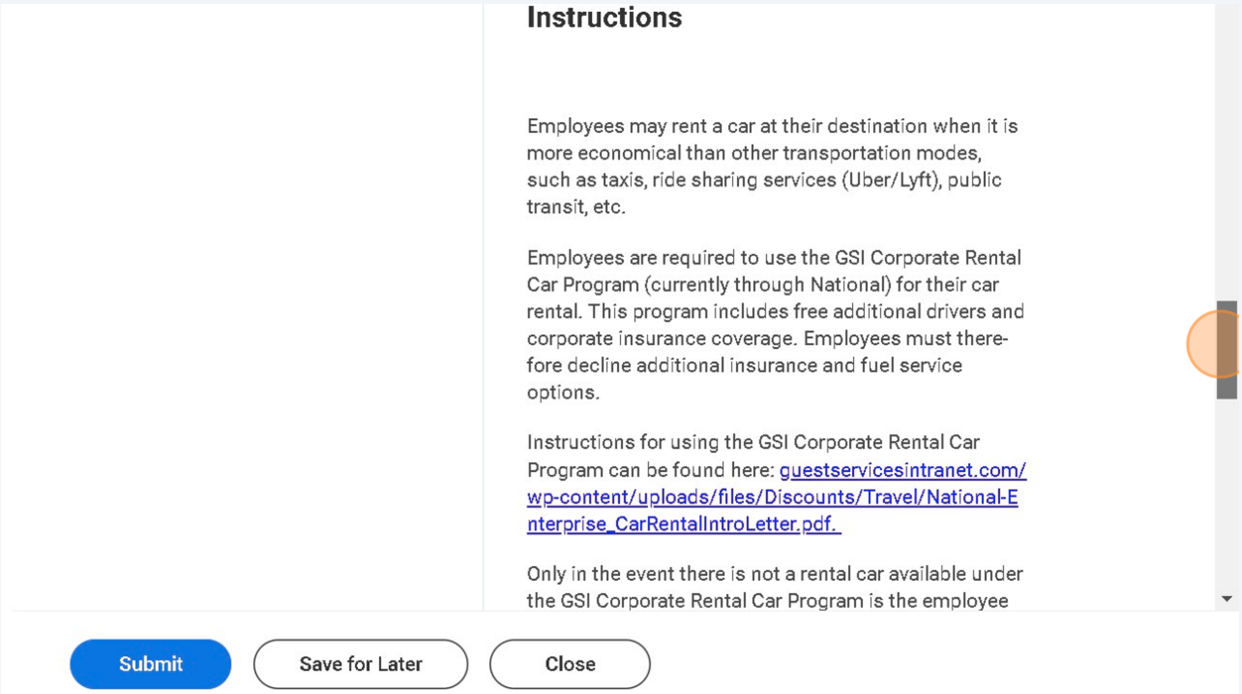
15 Type in the expense item or a keyword to search.



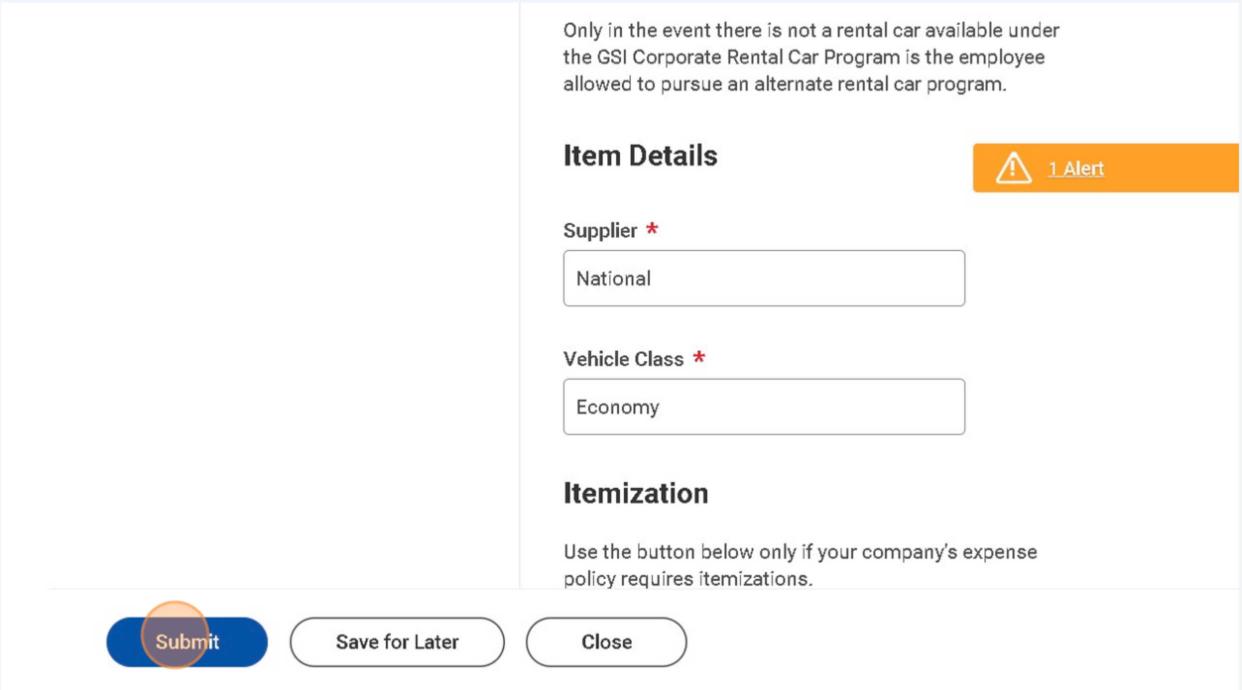
16 Enter a brief description of what the charge was for in the memo box. This helps your manager determine legitimacy and compliance of charges.



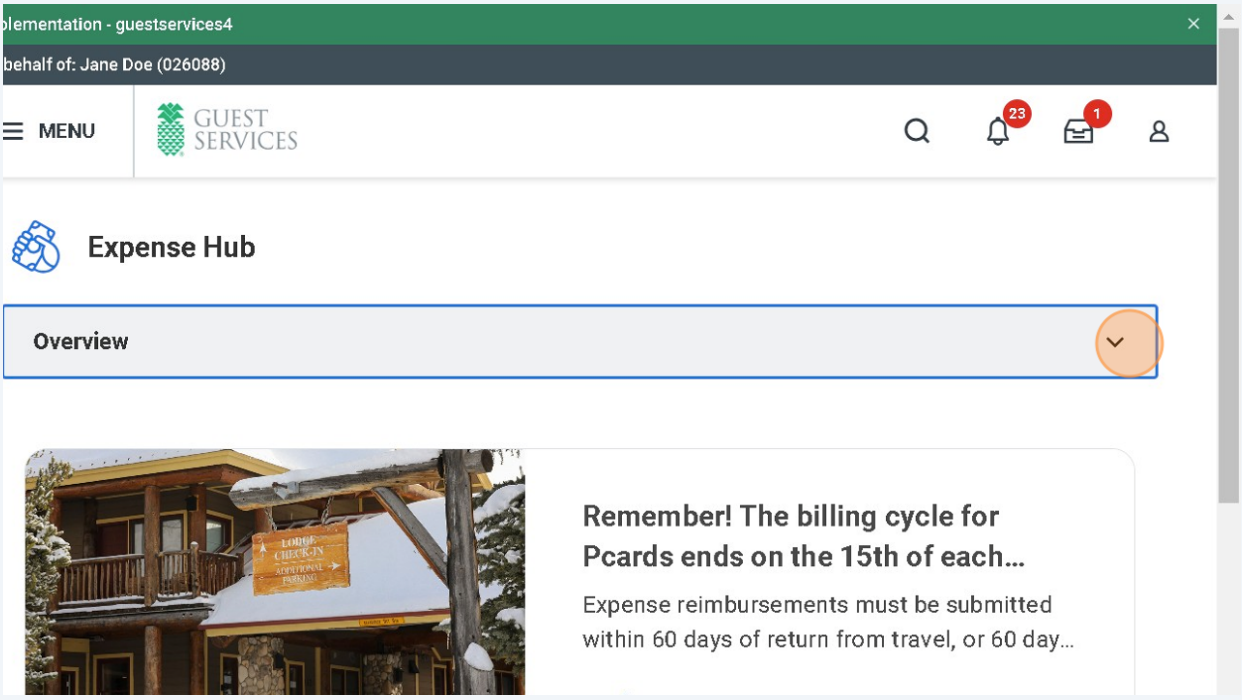
17 Some expense items have their own set of specific instructions. If they do, they will appear if you scroll down.



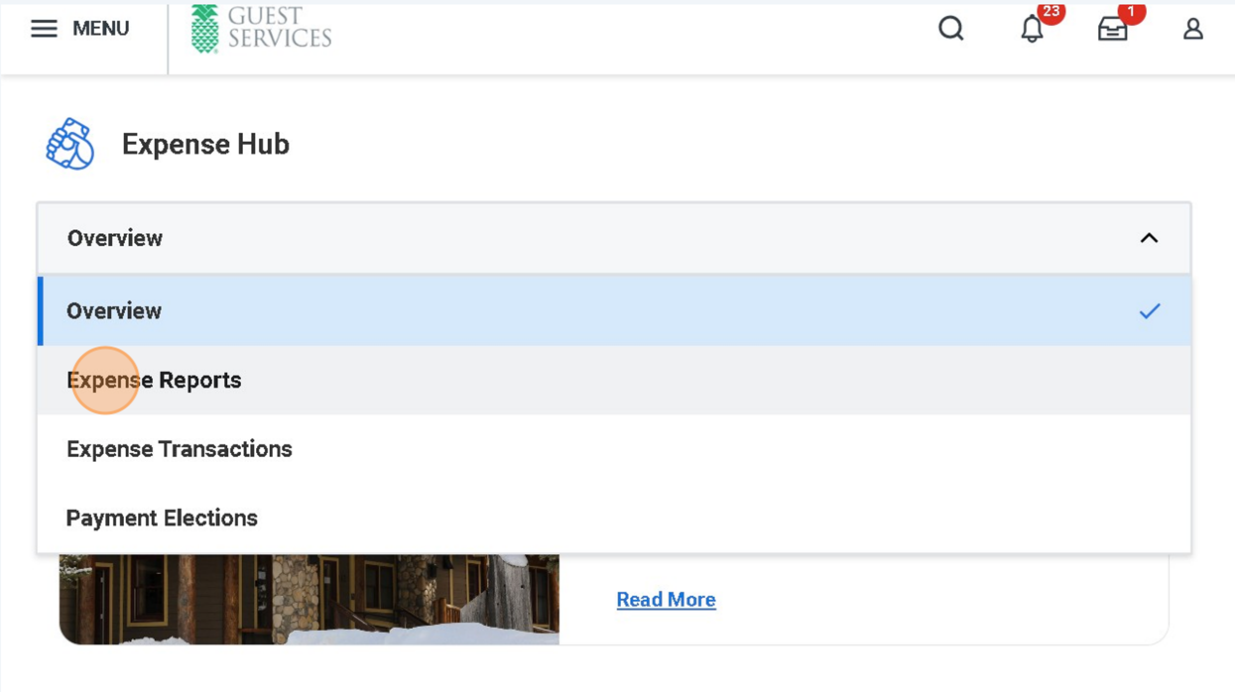
18 Fill out the required information in each expense line on your report. Go back to step 11 and add more expense lines, if needed. Otherwise, if you are finished, click "Submit."



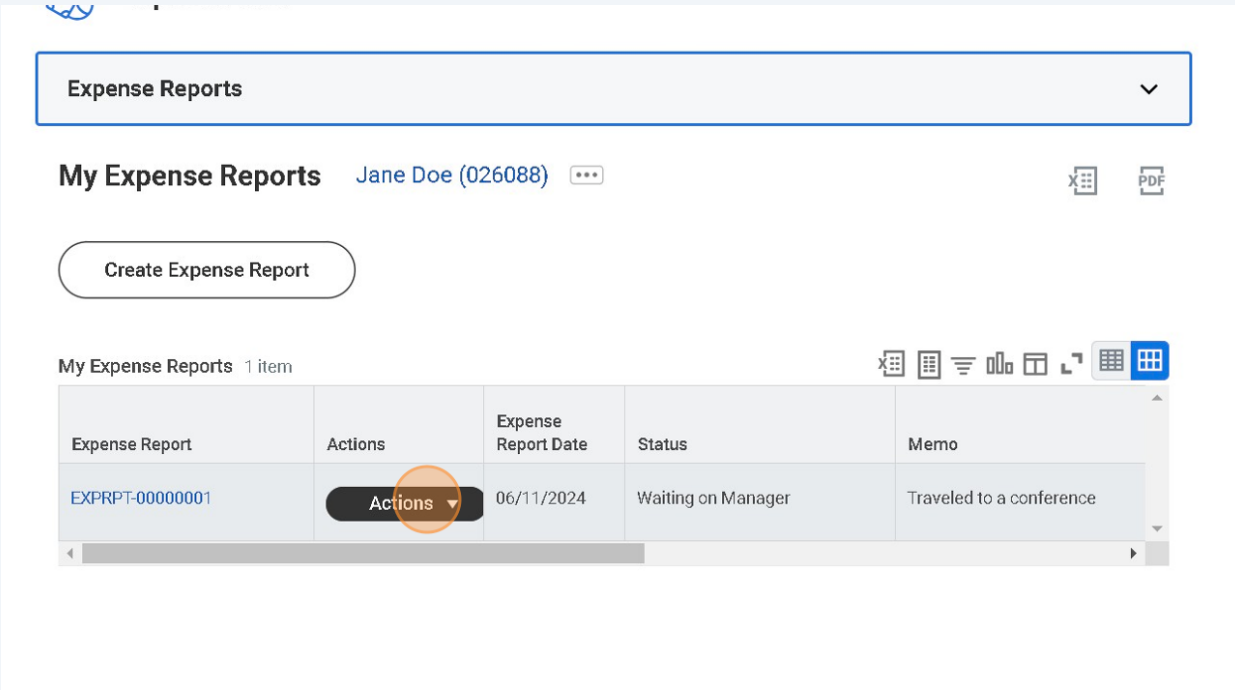
19 Back on the Expenses Hub page (see steps 1- 2), click "Overview" if you would like to review any reports that you have created.



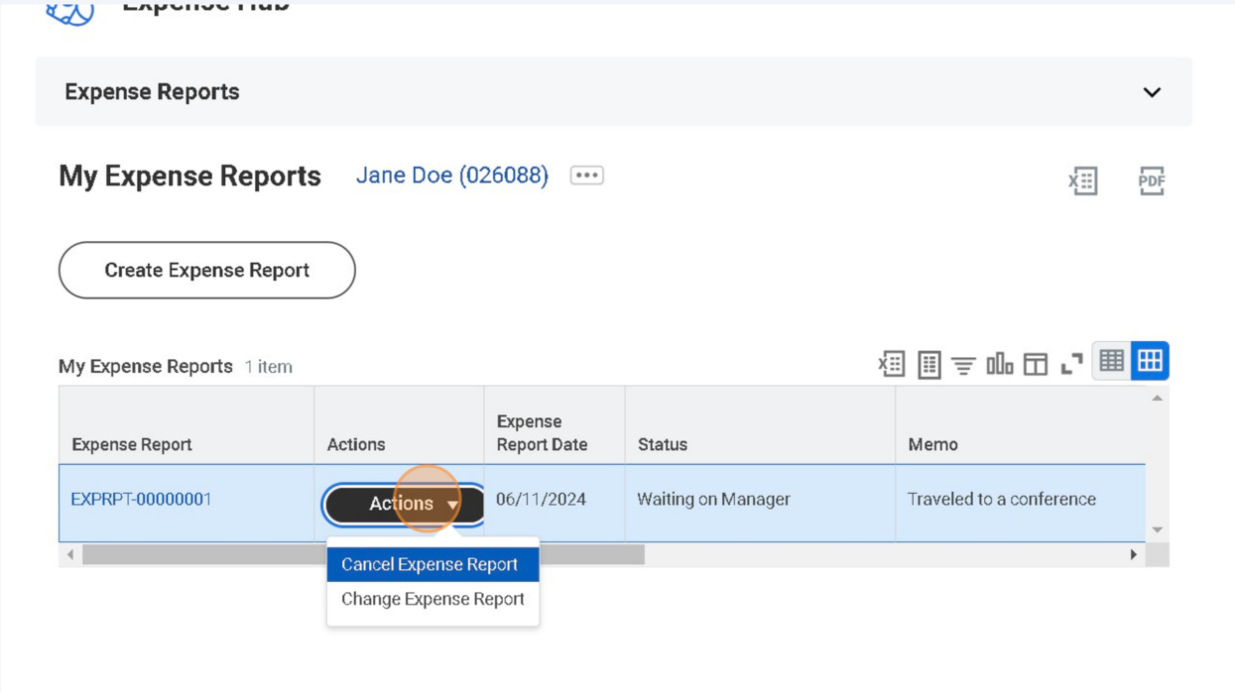
20 Click "Expense Reports"



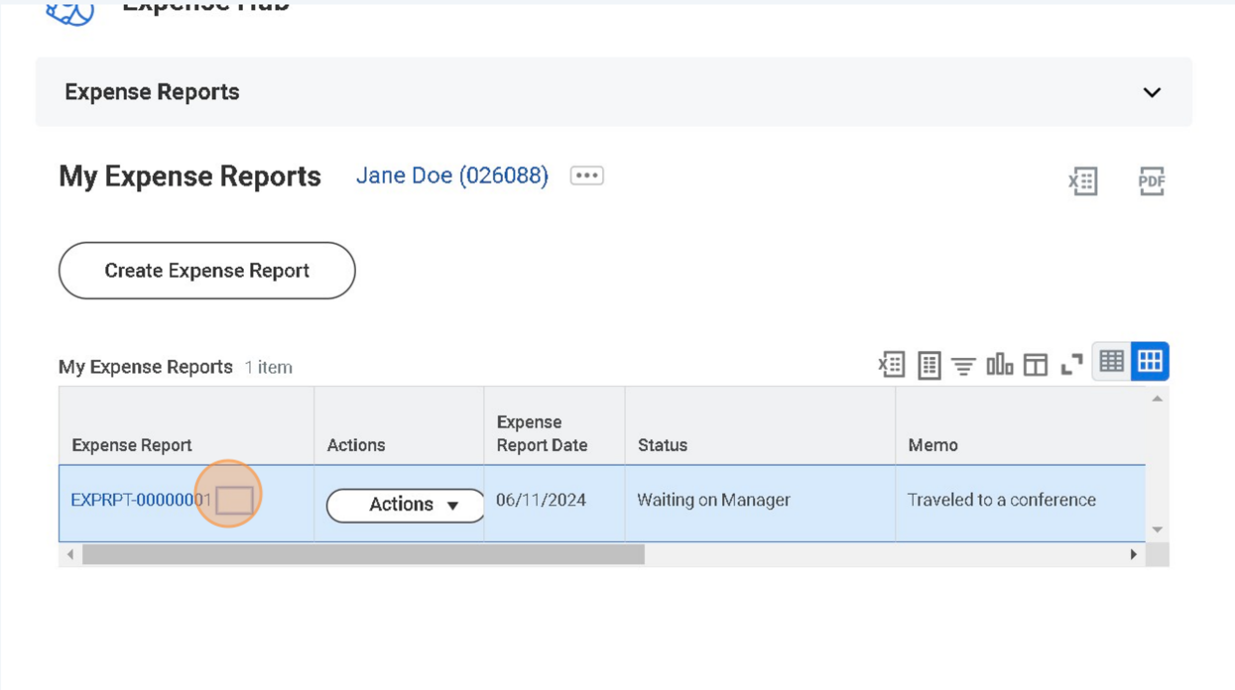
21 Here, you can see the expense report you just submitted.



22 If you click "Actions," you have the option to either cancel or change your expense report, as long as it has not yet been approved. In the status column, you can see that this report is "waiting on manager."



23 Another option is to hover your mouse over the area to the right of the expense report title, and click on the three dots that appear.



24 From here, you can edit, cancel, copy, or print your expense report. You can also save it as a favorite if you anticipate making similar expense reports in the future. That way, you can easily copy your report in the future and then make applicable changes as needed.