

Workday Expenses

Reference Guide

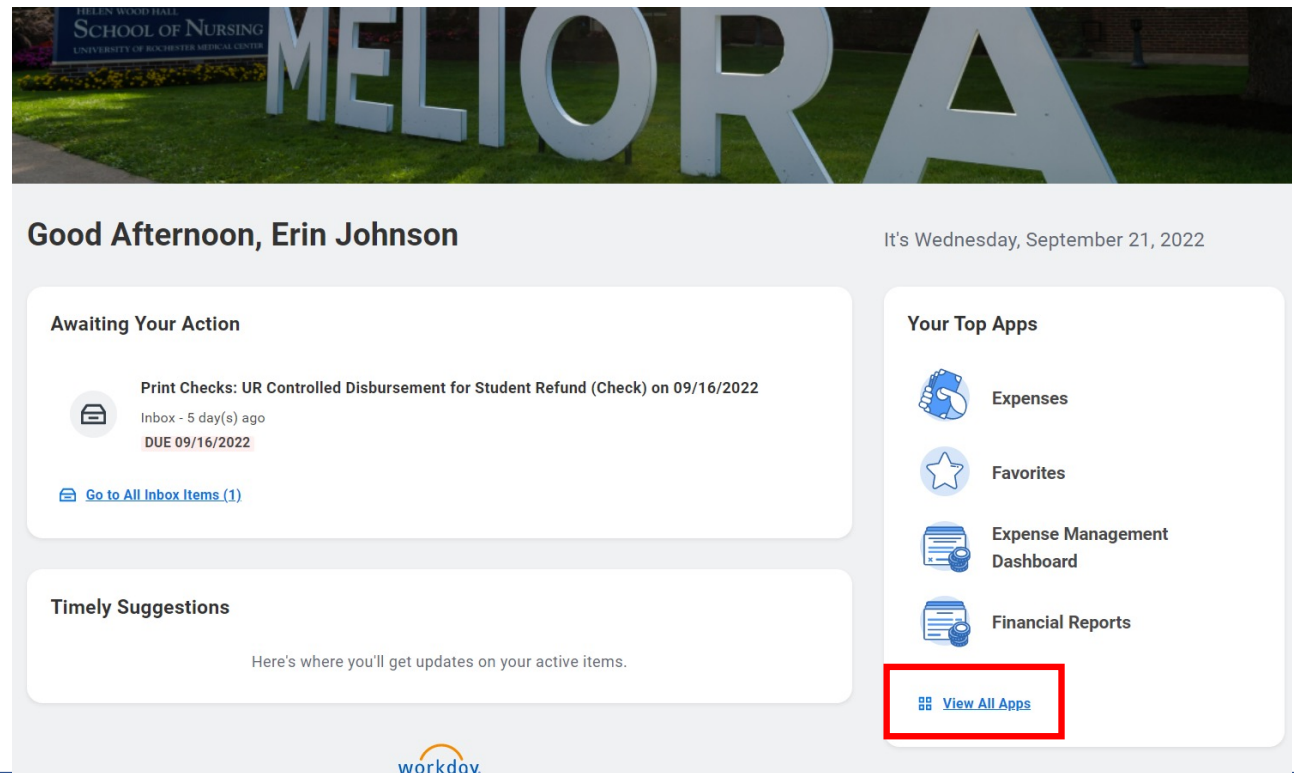
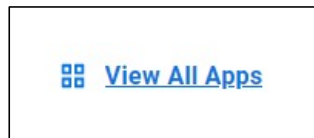
Adding the **Expenses App** in Workday



Adding the Expenses App in Workday

If you're not already in Workday, log into it using your UR Active Directory/NetID credentials at <https://www.rochester.edu/adminfinance/urfinancials/workday-login/>

- Select View All Apps



Good Afternoon, Erin Johnson

It's Wednesday, September 21, 2022

Awaiting Your Action

Print Checks: UR Controlled Disbursement for Student Refund (Check) on 09/16/2022
Inbox - 5 day(s) ago
DUE 09/16/2022

[Go to All Inbox Items \(1\)](#)

Timely Suggestions

Here's where you'll get updates on your active items.

Your Top Apps

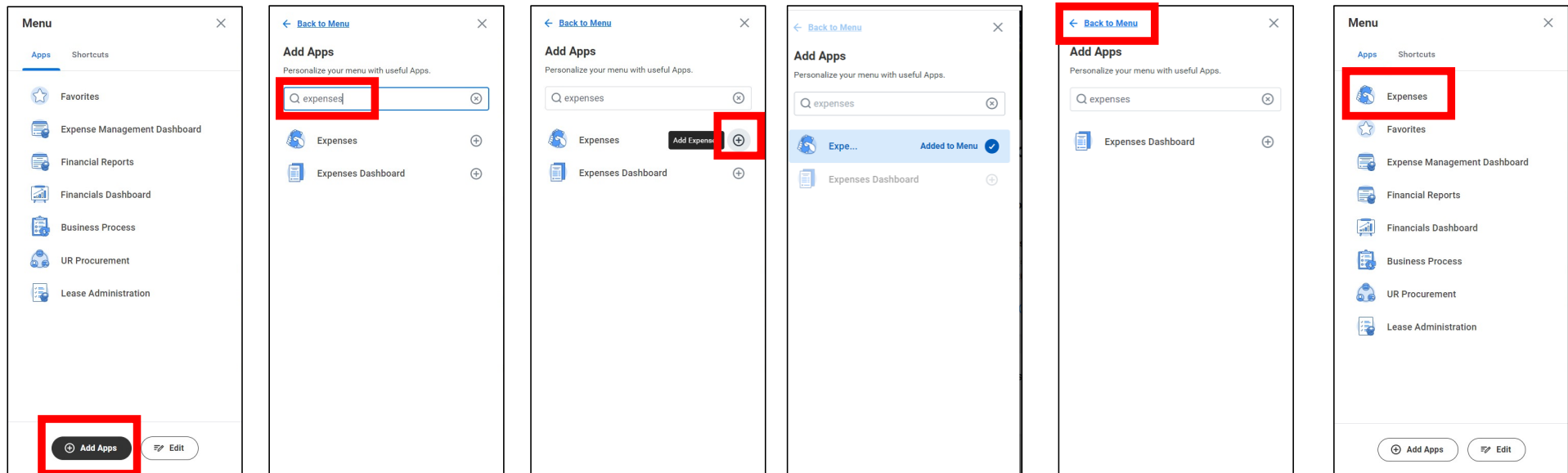
- Expenses
- Favorites
- Expense Management Dashboard
- Financial Reports

[View All Apps](#)



Adding the Expenses App in Workday

- Select **+ Add Apps**
- Type **Expenses** in the search box that appears on the left of your screen
- Select the **+ icon** to the right of Expenses to add it to your Apps
- Select **Back to Menu**, the Expenses icon is now saved as a favorite app



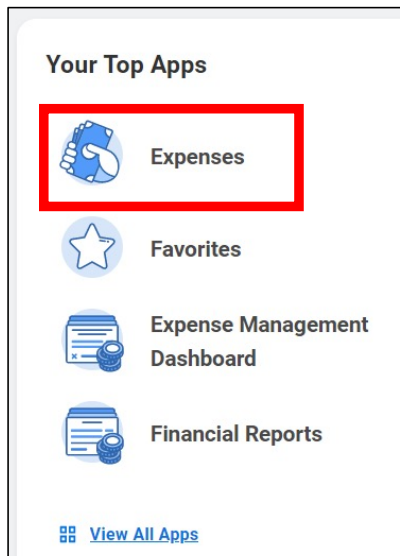
You have successfully added the Expenses App to your Workday homepage!



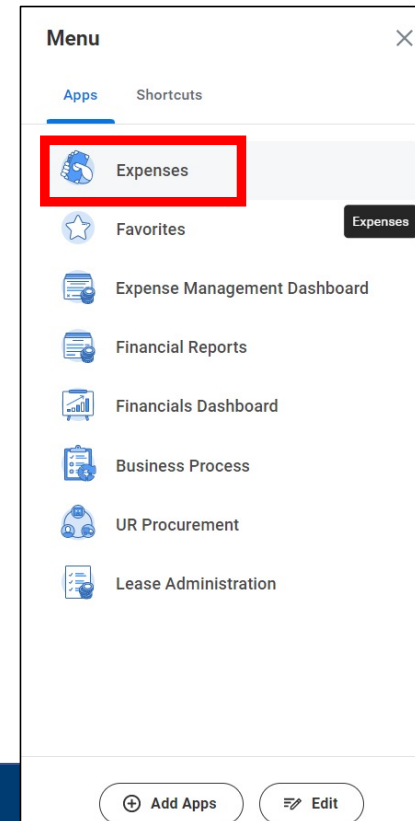
Adding the Expenses App in Workday

To view your Expenses dashboard:

- On your Workday homepage in **Your Top Apps** section, click on **Expenses**



- When the Expenses app is not listed, select **View All Apps**, then select **Expenses** from the Menu panel on the left side



UR AMEX corporate card transactions integration

Your Expenses dashboard has shortcuts to frequently used actions and views related to Expenses.

▪ Actions

- Create an Expense Report
- Create a Spend Authorization
- Edit Expense Transactions

▪ View

- Your Expense Reports
- Your Spend Authorizations
- Your Expense Transactions
- Your Payment Elections

▪ Recent Expense Reports

- Shows the recent expense reports and the status of the report

The screenshot displays a dashboard interface with three main sections:

- Actions:** A vertical list of four buttons: "Create Expense Report", "Create Spend Authorization", "Edit Expense Transactions", and "Edit Travel Profile".
- View:** A vertical list of six buttons: "Expense Reports", "Spend Authorizations", "Expense Transactions", "Payment Elections", "Travel Profile", and "Expense Outstanding Balance (0 USD)".
- Recent Expense Reports:** A section containing two report entries:
 - Canceled - 08/08/2022 - AAP (American Academy of Pediatrics) Membership Dues
 - Waiting on Manager - 08/08/2022 - AAP (American Academy of Pediatrics) Membership Dues

