

Expenses: Review and Approve Expenses

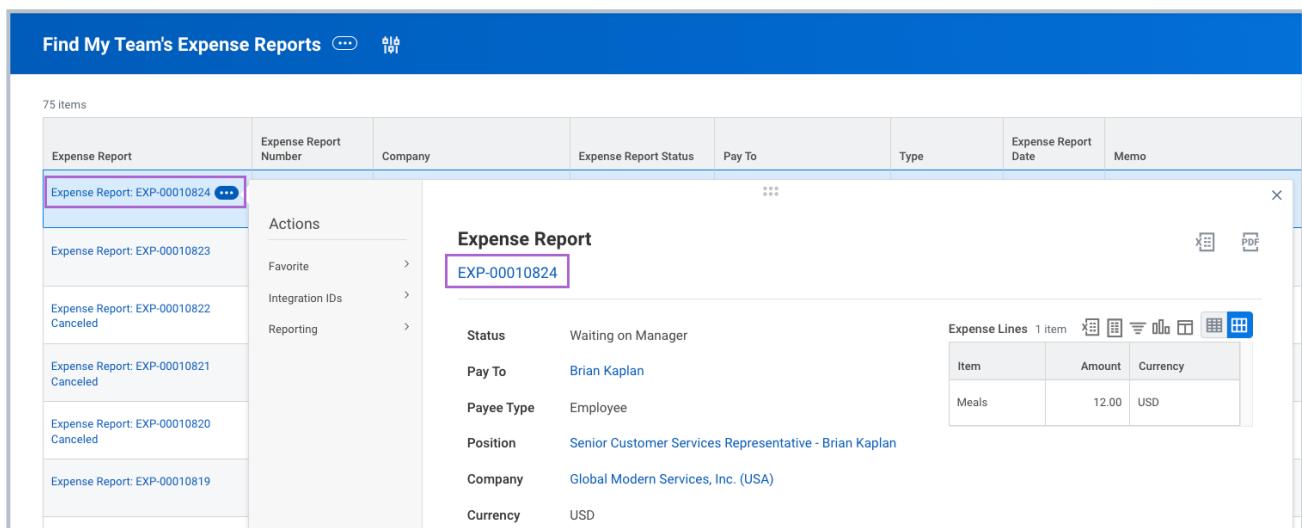
Manager

This job aid covers the manager's review and approval process for expenses. Workday allows managers to review and approve team expense reports from one location, increasing efficiency and streamlining the process.

View Your Team's Expense Reports

From the Spend Management application, under the Team section (desktop only):

1. Select **My Team's Expense Reports**.
2. Enter report criteria to filter results.
3. Select **OK**.
4. Select a report's **Related Actions** to display available actions or to preview the report.
5. Select the Expense Report **link** to view full report details.



The screenshot shows the 'Find My Team's Expense Reports' page with 75 items. A specific expense report, 'Expense Report: EXP-00010824', is selected and highlighted with a purple box. A detailed view of this report is overlaid on the list. The detailed view shows the following information:

Expense Report		Expense Report Number	Company	Expense Report Status	Pay To	Type	Expense Report Date	Memo
Expense Report: EXP-00010824		EXP-00010824						
Expense Report: EXP-00010823								
Expense Report: EXP-00010822 Canceled								
Expense Report: EXP-00010821 Canceled								
Expense Report: EXP-00010820 Canceled								
Expense Report: EXP-00010819								

Expense Report
EXP-00010824

Actions

- Favorite
- Integration IDs
- Reporting

Status Waiting on Manager

Pay To Brian Kaplan

Payee Type Employee

Position Senior Customer Services Representative - Brian Kaplan

Company Global Modern Services, Inc. (USA)

Currency USD

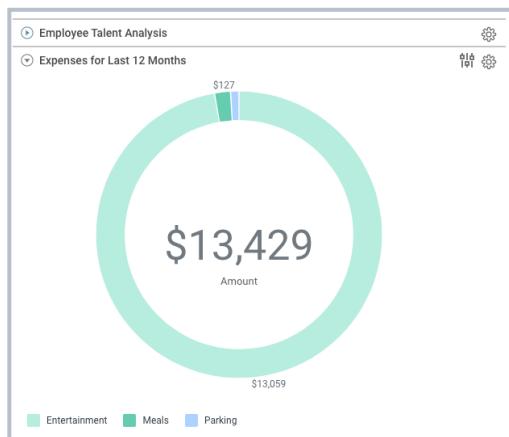
Expense Lines 1 item

Item	Amount	Currency
Meals	12.00	USD

Review and Manage an Expense Report

From the Workday Home page:

1. Select the **My Tasks** icon, then select the **expense report**. This will display drillable charts and analysis to help identify the types of expenses included in the report. You can also select the **Chart** icon to view these reports.



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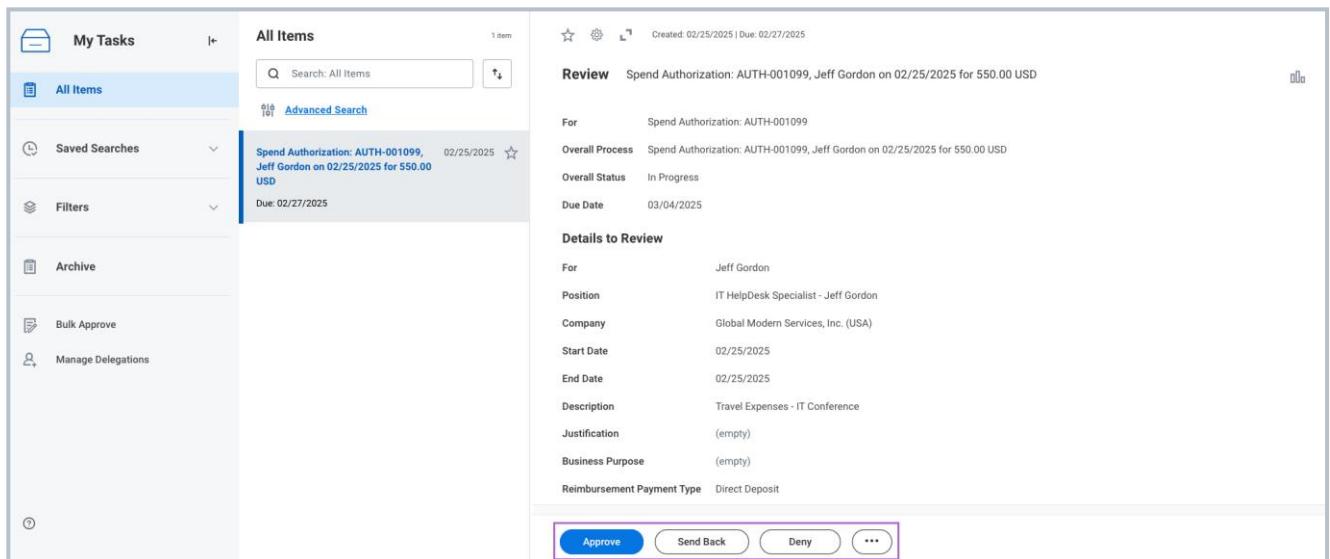
Manager

2. Scroll or expand the expense report to display full report details.
3. Complete the review and select one of the following actions:
 - a. Approve
 - b. Send Back (requires comment)
 - c. More
 - i. Add Approvers
 - ii. Deny
 - iii. Close

Review and Manage Spend Authorizations

From the Workday Home page:

1. Select the **My Tasks** icon, then select the **Spend Authorization** approval task.
2. Review the spend authorization details.
3. Select **Approve, Send Back, Deny, or Cancel**.



The screenshot shows the Workday Home page with the 'My Tasks' icon selected. The main content area displays an 'All Items' search bar and an 'Advanced Search' link. A specific task is highlighted: 'Spend Authorization: AUTH-001099, Jeff Gordon on 02/25/2025 for 550.00 USD'. The task details include: For Spend Authorization: AUTH-001099; Overall Process Spend Authorization: AUTH-001099, Jeff Gordon on 02/25/2025 for 550.00 USD; Overall Status In Progress; Due Date 03/04/2025. The 'Details to Review' section provides more information: For Jeff Gordon; Position IT HelpDesk Specialist - Jeff Gordon; Company Global Modern Services, Inc. (USA); Start Date 02/25/2025; End Date 02/25/2025; Description Travel Expenses - IT Conference; Justification (empty); Business Purpose (empty); Reimbursement Payment Type Direct Deposit. At the bottom, there are buttons for 'Approve', 'Send Back', 'Deny', and 'More'.

Review and Manage Procurement Requests

From the Workday Home page:

1. Select the **My Tasks** icon, then select the **Requisition** approval task.
2. Review the procurement request details.
3. Select **Approve, Send Back, or Add Approvers**. You can also select **Deny** or **Cancel** from the More button.

Expenses: Review and Approve Expenses Manager

My Tasks

All Items

Search: All Items

Advanced Search

Saved Searches

Requisition: REQ-7270, Requester: Jeff Gordon, Date: 02/25/2025, Amount: 700.00 USD

Filters

Due: 02/27/2025

Archive

Bulk Approve

Manage Delegations

Created: 02/25/2025 | Due: 02/27/2025

Review Requisition: REQ-7270, Requester: Jeff Gordon, Date: 02/25/2025, Amount: 700.00 USD

For REQ-7270

Overall Process Requisition: REQ-7270, Requester: Jeff Gordon, Date: 02/25/2025, Amount: 700.00 USD

Overall Status In Progress

Due Date 03/04/2025

Details to Review

Shipping Address

Information

Goods

Line	Image	Company	Item	Quantity	Unit of Measure
1		Global Modern Services, Inc. (USA)	Item Google Pixel 4	Requested 1	Each
			Item Description Google Pixel 4		

Approve Send Back Add Approvers ...