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.

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.
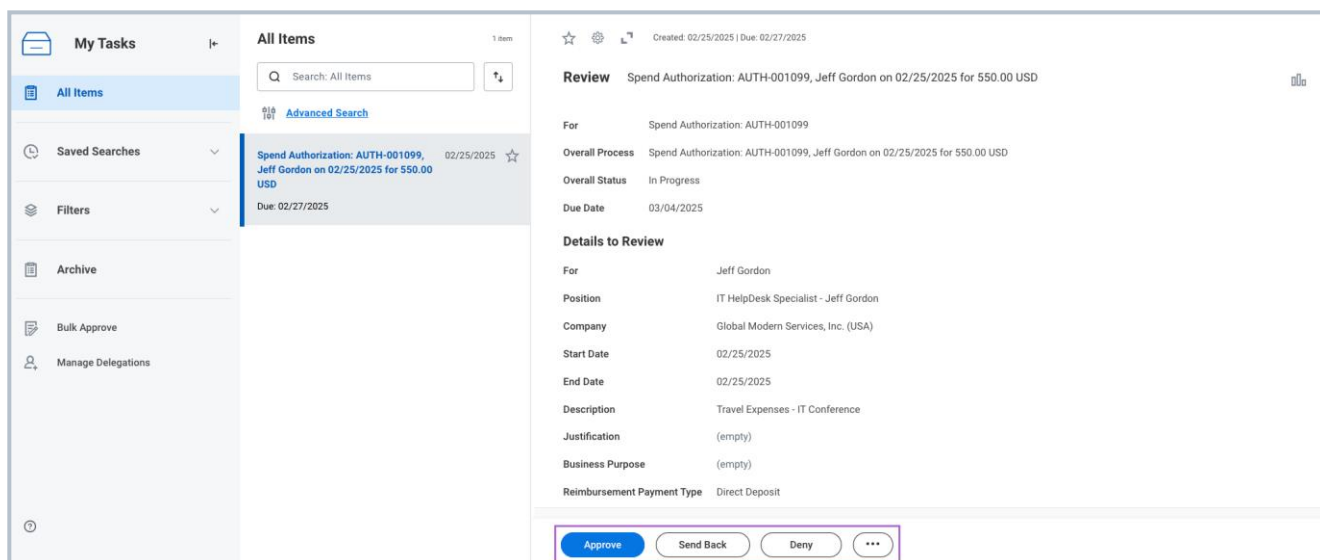
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2. Scroll or expand the expense report to display full report details.

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**.

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.

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