

Create an Expense Report

From the Expenses worklet:

1. Click the **Create Expense Report** button.
2. Select either **Create New Expense Report** or **Copy Previous Expense Report**. Your selection determines what information displays on the new expense report.
3. Click **OK**.
4. Click the **Add Row** icon in the Expense Report Lines section to add an expense item.
5. Complete all required fields, including Expense Item, Quantity, Per Unit Amount, and Total Amount. See Worktags below if your organization requires a project, cost center, and/or location associated to your expense report.
6. Add any attachments as needed.
7. Click **Submit**.

Add Worktags

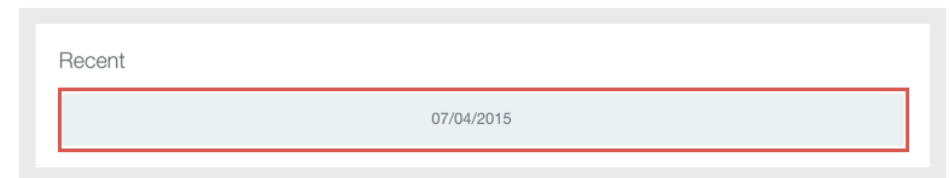
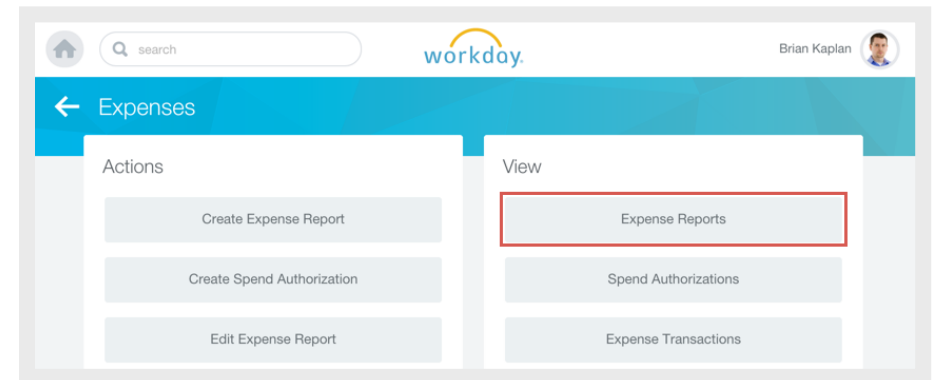
Worktags are keywords needed for the expense report to be routed correctly.

- **SmartKey:** Workday may auto-populate this field and should only be modified as needed.

View an Existing Expense Report

From the Expenses worklet:

- Click the **Expense Reports** button in the View section. You have the option of filtering expense reports by status or date.
- Or, click the date of the expense report you want to view in the Recent section.



Itemize Your Expenses

Your organization may require you to itemize your expenses. For example, your hotel bill may include your room rate, room service, internet fees, and more.

From the Expense Report Line within an expense report:

1. Click **Itemize**. Itemization fields display based on the expense type.

The screenshot shows the 'Expense Report Lines' interface. At the top, there are tabs for 'Expense Report Lines' and 'Attachments'. Below the tabs, there are buttons for '+ Add' and '+ Import Existing Record'. A table lists the expense report lines, with one line selected: '07/04/2015' for 'Meals' with an amount of '80.00'. To the right of the table, there is a 'Viewing:' section with icons for list and grid views. Below the table, the 'Expense Report Line' form is displayed. The form includes the following fields: 'Date' (07/04/2015), 'Expense Item' (Meals), 'Quantity' (4), 'Per Unit Amount' (20.00), 'Total Amount' (80.00), 'Currency' (USD), 'Currency Rate' (1), and 'Converted Amount' (80.00). The 'Itemize' button is highlighted with a red box.

2. Enter the necessary information based on the expense type you are itemizing.
3. Click **Done**.