

Create Expense Report with Expense Line

Purpose

To help employees and managers create and submit expense reports in Workday, including adding detailed expense lines for reimbursement.

Overview

The **Expense Module** in Workday allows users to:

- Create and submit expense reports
- Add multiple expense lines with itemized details
- Route reports for approval to managers and payroll

This process ensures accurate tracking and reimbursement of work-related expenses.

Step-by-Step Instructions

Part 1: Create Expense Report

Step 1: Access Expense Hub

- Log in to Workday.
- From the left-side menu, click **Expense Hub**.
- Alternatively, type **Create Expense Report** in the **Search bar**.

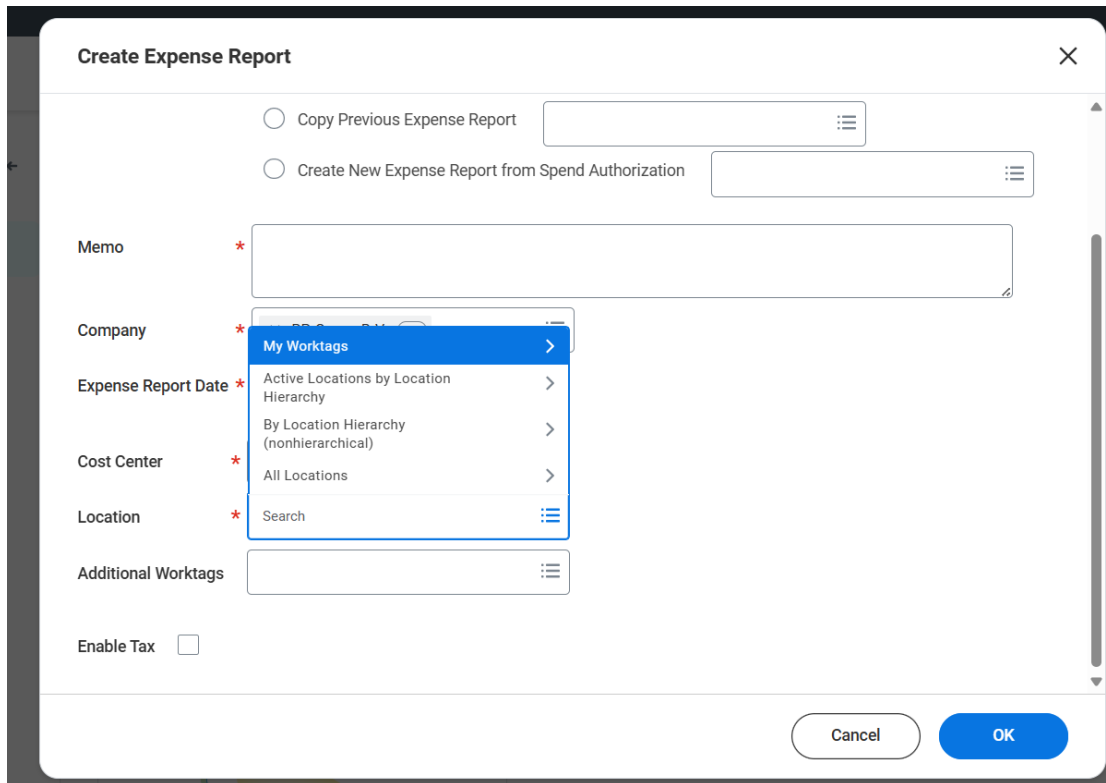
Step 2: Start Report Creation

- Click **Create Expense Report** under the Tasks section.
- Fill in the **Memo** field (e.g., *Work from home*).
- Fields like **Company**, **Expense Report Date**, and **Cost Center** are auto populated.

Step 3: Enter Location and Tax

- Select **Location** from **My Worktags**.
- Choose **WFH Allowance** as the expense type.
- Enable **Tax** if applicable.

- Click **OK** to proceed.



Part 2: Add Expense Lines

Step 1: Add Line Items

- Click **Add** under **Expense Lines**.
- Select the **Expense Date** and **Expense Item**.

Step 2: Filter and Fill Details

- Filter items by:
 - **Expense Item Group**
 - **Spend Category**
 - **Alphabetical Order**
- Fill in all required fields based on the selected item.

Step 3: Submit or Add More

- If you have only one line, click **Submit**.
- To add more lines, scroll up and click **Add** again.

Expense Line
🗑️

Drop files here

or

Select files

Expense Date * 02-09-2025 📅

Expense Item * X WFH Allowance ⋮

Quantity *

Per Unit Amount 2,40

Total Amount 2,40

Currency EUR

Memo *

Instructions

Please enter the number of days you worked from home in the "Quantity" field. In the "Memo" field, specify the exact dates you worked from home.

Receipt Included

Note:

- In **Expense Hub**, you can also:
 - View existing expense reports
 - Access expense transactions
 - View travel profile and payment election details
- After submission, reports go to the **Manager** and **Payroll Team** for approval.
- If a report is **denied**, the process is cancelled and the employee is notified.
- If **sent back**, the employee can revise and resubmit.