Finding & Editing Draft Expense Reports

Once an expense report has been started in Workday, but not completed, the expense report will go into “Draft” status. It is important to note that expense reports in “Draft” status will not be reflected on a budget, until they are submitted, and reviewed/approved by the Cost Center Manager. Please follow these steps to find and edit a draft expense report.

1. Log into Workday and Click the “Expenses” application.
2. Your draft Expense Report should appear under “Recent Expense Reports”. Click the Expense report you want to work on and it will open up in edit mode. When you have finished editing, see step 6. **If the ER you are looking for does not appear here, see steps 3-5 below.**

3. Click on “Expense Reports” under the View column and follow steps 3-5 below to open and edit your expense report.

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Actions
Create Expense Report
Create Spend Authorization
Edit Expense Report (2)

View
Expense Reports
Spend Authorizations
Expense Transactions (10)
Payment Elections

Recent Expense Reports
Draft - 08/24/2020 - test
Draft - 08/18/2020 - test

Canceled - 06/05/2020 - Student travel expenses as a result of COVID-19, March 2020. A detailed Report of charg...
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4. Click the 3 bars on the right-hand side of the “Expense Report Status” field and select “Draft” from the drop down menu. Back-date the “Report Date On or After” field and click on “OK” at the bottom of the page.
5. A list of any/all drafts (depending on the date range you entered) will appear. Find the Expense Report that you want to edit. Hover your mouse to the right of the magnifier, and an orange “Twinkie” will appear. Click on the “Twinkie” and a sub-menu will appear.

7. The Expense Report will open in the editing mode, and you can complete it. Once it is completed, be sure to hit the submit button at the bottom of the screen.

8. Please MAKE SURE you see the word “SUCCESS” after clicking submit, or else the Expense Report will be automatically “Saved For Later”.

Success! Event submitted
Expense Report: ER-011 on 07/09/2019 for $2,403.53

Details and Process