

# HOW TO FIND DRAFT EXPENSE REPORTS **WORKDAY JOB AID**

This job aid will assist in finding expense reports that were started but not submitted so they can be resolved



FLORIDA POLYTECHNIC  
UNIVERSITY



ENTERPRISE SYSTEMS  
FLORIDA POLYTECHNIC  
UNIVERSITY

2020

# HOW TO FIND DRAFT EXPENSE REPORTS

## WORKDAY JOB AID

STEP-BY-STEP GUIDE ON FINDING DRAFT EXPENSE REPORTS

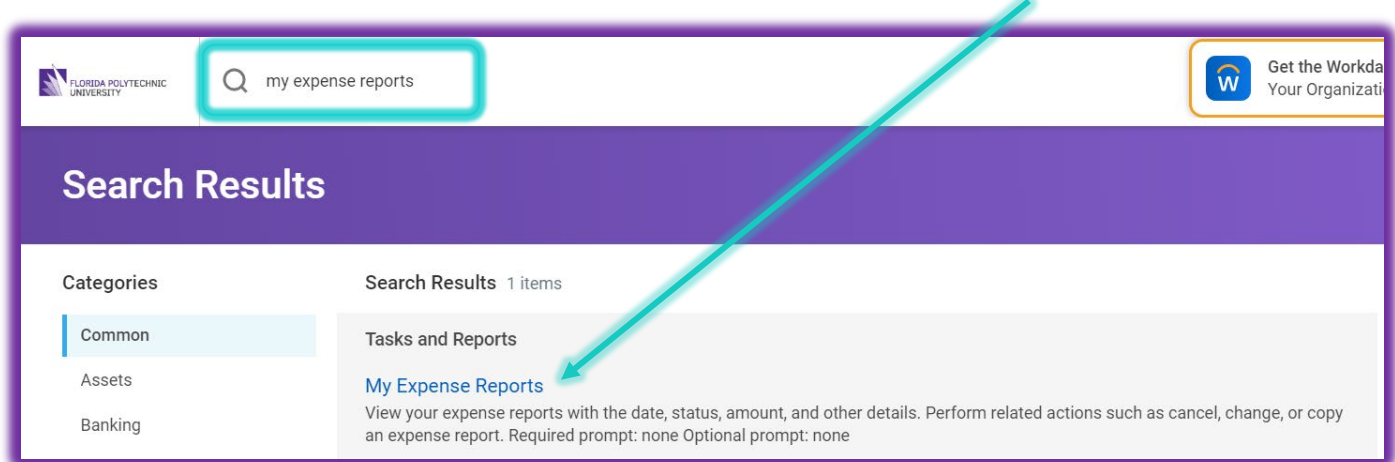
### Purpose

To provide users with step-by-step instructions of how to find any expense reports that were left in draft status so they can be resolved.

### The How To:

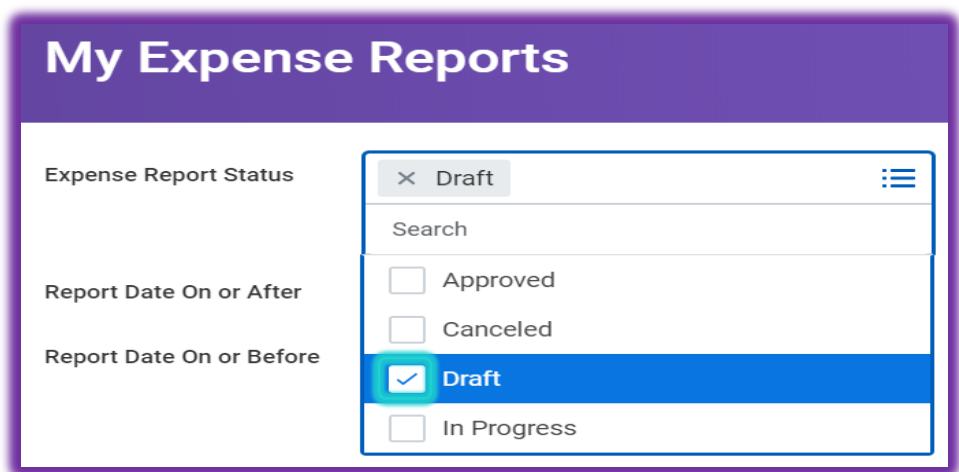
#### Step 1

Type **"My Expense Reports"** in the search bar and click on the [linked](#) report text:



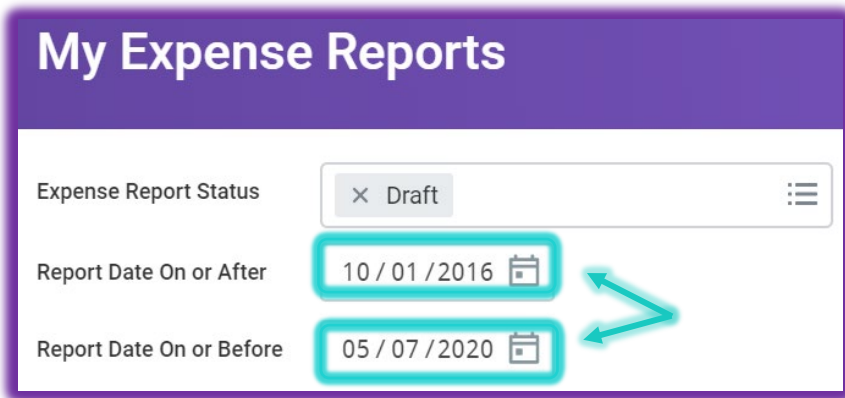
#### Step 2

Choose **"Draft"** for the  
Expense Report Status:



### Step 3

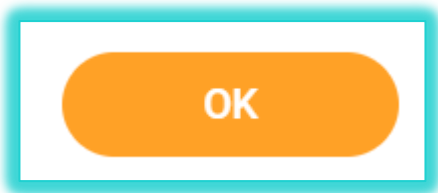
Adjust the expense report date fields as needed:



The image shows a form titled "My Expense Reports". It has three main fields: "Expense Report Status" with a dropdown menu showing "Draft", "Report Date On or After" with a date field set to "10 / 01 / 2016", and "Report Date On or Before" with a date field set to "05 / 07 / 2020". Red boxes highlight the date fields, and a red double-headed arrow indicates the relationship between them.

### Step 4

Select the 'OK' button:



### Step 5

Selecting the "Edit Expense Report" button will allow you to complete the expense report for submittal. If the expense report is not needed, you may cancel it instead.

Selecting the magnifying glass under the "Expense Report" column allows you to view the expense report if you wish to review it before making a decision.



The image shows a table titled "My Expense Reports 3 items". The table has columns: Expense Report, Expense Report Number, Expense Report Date, Expense Report Status, Memo, Total Amount, Reimbursement Amount, Worker Paid, Personal Amount, Currency, and Company. The first three rows are highlighted. A red magnifying glass icon is in the first column of the first row. A red box highlights the "Edit Expense Rep..." button in the first row.

Expense Report	Expense Report Number	Expense Report Date	Expense Report Status	Memo	Total Amount	Reimbursement Amount	Worker Paid	Personal Amount	Currency	Company	
Q	ER-2000953	09/24/2019	Draft		0.00	0.00		0.00	USD	Florida Polytechnic University	Edit Expense Rep...
Q	ER-2000954	09/24/2019	Draft		0.00	0.00		0.00	USD	Florida Polytechnic University	Edit Expense Rep...
Q	ER-2000933	09/23/2019	Draft		0.00	0.00		0.00	USD	Florida Polytechnic University	Edit Expense Rep...

## Step 5 (cont.)

Lastly, to **edit** or **cancel** you may use the related actions off the magnifying glass as seen below:

The screenshot shows the Workday Expense Report interface. On the left, there is a sidebar with the Florida Polytechnic University logo and a navigation menu. The main area displays the 'Expense Report' details. A magnifying glass icon is highlighted in the sidebar, and an 'Actions' menu is open, showing options: 'Expense Report', 'Favorite', 'Integration IDs', 'Navigate', 'Edit', 'Cancel', 'Copy', 'Enable Multicurrency', and 'Print'. The 'Edit' and 'Cancel' options are highlighted with a red box. The 'Expense Report' details include: Payee Type (Employee), Company (Florida Polytechnic University), Currency (USD), Date (09/24/2019), and Payment Type (Direct Deposit). Below this, a table lists expense reports:

Expense Report ID	Date	Status	Amount
ER-2000954	09/24/2019	Draft	0.00
ER-2000933	09/23/2019	Draft	0.00

