



Managing Receipts

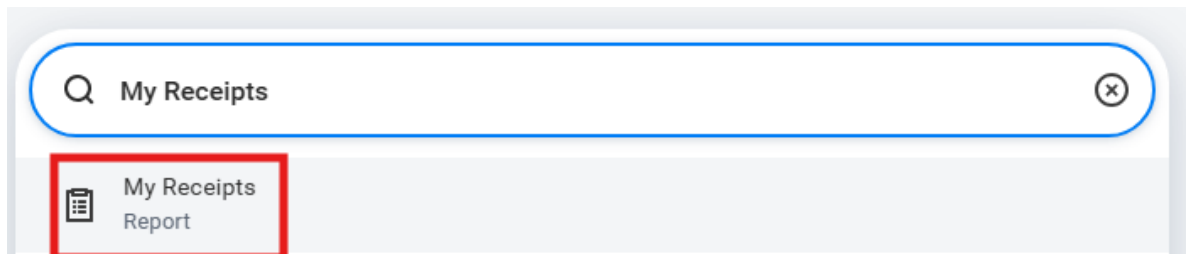
This How-To Guide covers how to **edit** existing receipts and how to **submit** a receipt in **Draft** status in Workday. Only receipts that have a status of **Approved** will allow a Supplier Invoice to be matched and paid. Receipts with a status of **Draft** or **In Progress** prevent invoices from being paid.

This guide can be used:

- To manage and view status of receipts
- Understand how to submit receipts
- To add any missing information
- To correct a quantity receipt or add a missing attachment

Start Here

1. Open **Google Chrome**.
2. Navigate to **Workday**.
3. If prompted, login with your **College email** and **password**.
4. Type **My Receipts** in the **Workday search bar** and select it





5. If you have the **receipt number** or **PO number**, you can add that information in the respective fields. You can also leave these fields blank to see all receipts you have created.

My Receipts

Company

Receipt

Receipt Status

Receipt Date On or After MM / DD / YYYY

Receipt Date On or Before MM / DD / YYYY

Supplier

Purchase Order

Supplier Contract

Spend Category

Item

Filter Name

Manage Filters

0 Saved Filters

Save

Cancel OK

6. Using the **Receipt Status** field will narrow search results. For example, you can filter for **Draft** and or **In Progress** statuses to see receipts that need attention. Select **Ok** to see the results.

My Receipts

Company

Receipt

Receipt Status

Receipt Date On or After

Receipt Date On or Before

Supplier

Purchase Order

Draft

In Progress

Search

Adjustment In Progress

Approved

Canceled

Denied

Draft

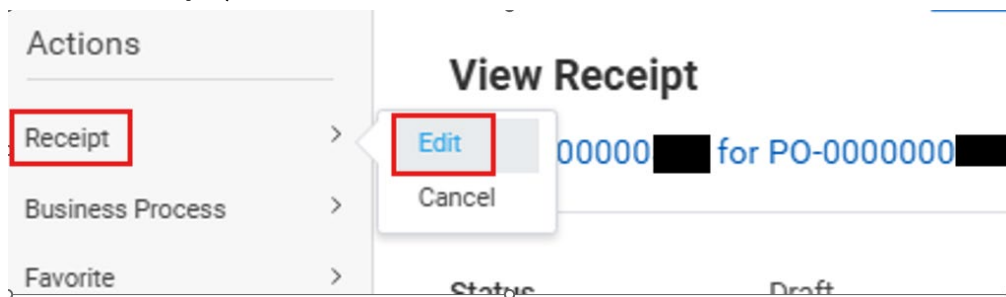
In Progress



7. From the report that appears, locate the receipt that needs attention and select the **Related Actions** button.



8. Select **Receipt** > **Edit**.



9. **Edit** the receipt as needed. You can:
 - **Edit** your information (Add any **missing information**)
 - **Attach** your receipt document (i.e., packing slip)
 - Select **Submit** on a Draft receipt.
10. Select the **Submit** button when finished editing or simply to finalize a **Draft** receipt.

Have Questions? For assistance, please contact help@brynmawr.edu or 610-526-7440.