



Mobile Expense Reporting

This How-To Guide covers how to create **expense reports** in the Workday mobile app. Mobile Expense Reporting allows users to **create** and **submit** expense reports on the go.

Create a New Expense Report

1. On your mobile device, log into your **Workday mobile app**.
2. Under **Apps**, select **Expenses** (can be found under **Most Used**, if you use Expenses often).
3. You will see two options: **Available Expenses** and **Expense Report**. Use the Expense Report tile to find the link **Create Expense Report**.
4. Use the **Memo** field to enter a brief description of the purpose of this report.
5. Leave **Company** as the default: Bryn Mawr College.
6. For **Expense Report Date**: this will default to today's date. Please update, especially for fiscal year end, to the **appropriate expense date**.
 - This expense report date will drive the **posting fiscal year** of your expense – it **does not** use the credit card transaction date.
7. Select a **Business Purpose**.
8. Budget worktags:
 - Your **Cost Center** will default to your supervisory organization.
 - Update worktags as needed: choose the appropriate **Grant, Project** or **Additional Worktags** (roll forward, activities, etc.).
 - Travel: We suggest you populate this field. Choose the appropriate option: **Domestic** or **Foreign**. **Travel Expense Items** require a Travel Worktag to be selected. Selecting this now avoids the need to populate it on every travel expense item in your report. Update as needed in the Expense Report Lines.
9. Select **Done** (iPhone) or **blue check mark** (Android) in top right corner of your device.



10. A **Draft** report screen will appear. There you will find a **New Expense** link. Click this link to add expenses to your report.

- **New Expense:** Use this option to enter an expense that you personally paid for and are requesting to be reimbursed. Follow the user guide [Create Expense Report - Reimbursement \(v2\) \(starting at step 10, page 3\)](#) for more details on reimbursement expense reporting.
- **Existing Expenses:** Use this option to find Quick Expenses and/or College Credit Card transactions. Please see below for more details on these options:

Existing Expenses: Add Quick Expenses to an Expense Report

From the list of **Existing Expenses**, you will find Quick Expenses or College Credit Card transactions. To learn more about creating and using Quick Expenses, please see the [Quick Expenses guide](#). Quick Expenses should only be added to a draft report during this stage, when they are **personally paid business expenses for which you are seeking reimbursement**.

1. Select the **checkbox(es)** for the Quick Expenses you want.
2. Select **Next** or **click the check box on the top right screen** to add to an expense report.
3. You may see errors on your added Quick Expenses – a **red exclamation point icon** will appear. Click on each expense item to resolve the errors.
4. When you are done, select **Review** and **Submit**.

Existing Expenses: Create an Expense Report with Credit Card Transactions

From the list of **Existing Expenses**, you will find Quick Expenses or College Credit Card transactions. If you created Quick Expenses to store receipts for your College Credit Card purchases, please **do not** check them off at this stage of the expense reporting process. You will link them later. To learn more about creating and using Quick expenses, please see the [Quick Expenses guide](#).

1. Select the **checkbox(es)** for the credit card transactions you wish to add to the report and select **Next**.



2. You will receive an **error** that information is missing. A **red exclamation point icon** will appear. Click on each expense item to resolve the errors.
 - If you are missing a receipt and you have already created a Quick Expense to store this receipt, use the **Linked Quick Expense** drop down field to select the corresponding Quick expense. The receipt image, expense item category, and memo will populate. Review and edit fields, as necessary.
 - If you do not have a quick expense: use **Add Attachments** to add a receipt, add a description in the **Memo** field, and select an **Expense Item**.
3. If this is a **Personal Expense**: Scroll to the bottom of the expense and you will see an option for marking this as a personal expense. **Only** use this option if you used your credit card for a personal item and need to **reimburse the college**.
4. If you need **split costs**: Scroll to the bottom of the expense and you will see an option for **itemization**. You can use the **(+) Add New** button if you want to split this cost between budgetary worktags (grants, activities, other cost centers). See user guide about itemization for step-by-step direction: [Create Expense Report - Credit Card](#).
5. Select **Done** to close this Expense Item.
6. If needed, use **(+) button** on the top right screen (Apple) or **New Expense** Link above the report date (Android) to add more expenses.
 - If you add any additional expenses that weren't paid with a college credit card, make sure you remove the checkmark that says **Paid with Corporate Card**. You will need to do this even if you are adding a **quick expense**.
7. When you are finished with this Report, select **Review** and then **Submit**.

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