

FINDING & EDITING DRAFT EXPENSE REPORTS IN WORKDAY

This process guide supports processors that need to:

- Find and edit Expense Reports in Draft status in Workday.



Expense Reports are in Draft status when:

- They are initially created and have **not** been submitted.
- They are “Saved for Later.”
- The initiator exits and/or Workday times out while they are working on an Expense Report.

INSTRUCTIONS: FINDING A DRAFT EXPENSE REPORT

1. Run **RPT – Find Expense Reports (UAMS)**.
2. Check **Draft** in the **Expense Report Status** field.

The screenshot displays the 'RPT - Find Expense Reports (UAMS)' interface. On the left, a search bar contains the text 'find expense report'. Below the search bar, a list of reports is shown, with 'RPT - Find Expense Reports (UAMS) Report' highlighted in a red box. On the right, the filter settings for the selected report are displayed. The 'Expense Report Status' field is highlighted in a red box, and the 'Draft' status is selected in the dropdown menu.

CONTINUED: INSTRUCTIONS: FINDING/EDITING A DRAFT EXPENSE REPORT

- You can use the **Pay To, Created by Worker**, and other fields to narrow your search results.
 - Pay To** refers to the traveler on the Expense Report.
 - Created by Worker** refers to the person that created the ER in Workday.
- Select OK. Results will show all the ERs in Draft status matching the criteria from your search.
- Click the Related Actions (...) button > **Expense Report** > **Edit** or **Cancel**.
 - Edit** to continue working on the ER.
 - Cancel** to delete the ER.

