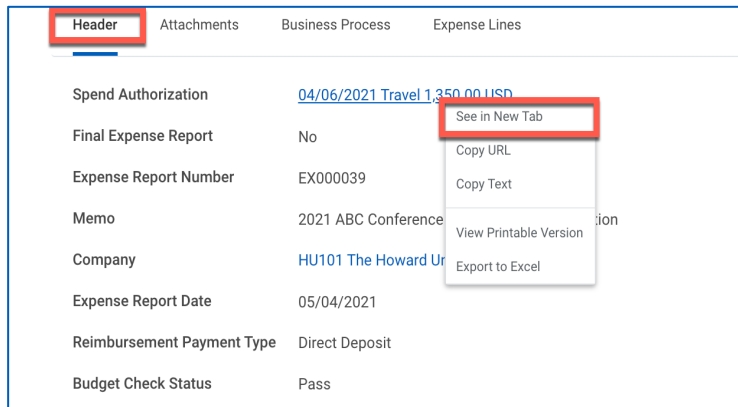# Travel: Review and Approve Expenses

This job aid details the approver's review and approval process for expense reports. Workday enables approvers to review and approve team expense reports from one location, increasing efficiency and streamlining the process. This process will only be used for out of pocket expenses both travel and non-travel.

VIEW AND APPROVE EXPENSE REPORTS

From your Workday Inbox:

1. Click on to the expense report that to review and approve.

2. For out of pocket travel expenses it is necessary to verify worktags on expense report lines are the same worktags that were used on the related Spend Authorization. To do this, navigate to the **Header** tab then right-click on the Spend Authorization link and select the **See in New Tab** option. The information displays in a new tab. From here, compare the worktags and verify they match. This is only required for out of pocket travel expenses.

Header	Attachments	Business Process	Expense Lines

Spend Authorization	04/06/2021 Travel 1,350.00 USD
Final Expense Report	No
Expense Report Number	EX000039
Memo	2021 ABC Conference ... tion
Company	HU101 The Howard Ur ...
Expense Report Date	05/04/2021
Reimbursement Payment Type	Direct Deposit
Budget Check Status	Pass

Right-click menu:
- See in New Tab
- Copy URL
- Copy Text
- View Printable Version
- Export to Excel

3. Verify the appropriate Expense item has been selected. For Grant-related expenses, the expense item should belong to the **Expense Item Group** of "Grant Expenses".

4. Review supporting documentation attached to each line and verify the receipt matches the expense entered.

5. Click the **Approve** button at the bottom of the Expense Report. If information on the Expense Report needs to be adjusted by the employee, use the **Send Back** button, and enter a description of the changes required.

Once the document is fully approved, the transaction will automatically be posted to the general ledger and will impact the budget for the worktags (i.e., Cost Center, Grant, Fund) listed on the expense report.

REVIEW AND MANAGE SPEND AUTHORIZATIONS

This job aid details the approver's review and approval process for spend authorizations. Workday enables approvers to review and approve team spend authorization from one location, increasing efficiency and streamlining the process. This process will only be used to preapprove travel-related expenses.

From your Workday Inbox:

1. Click the **Spend Authorization** approval task.

2. Review the spend authorization details including the worktags (i.e., Expense Item, Cost Center, Grant, Fund) for each line.

   Select **Approve** button. If information on the Spend Authorization needs to be adjusted by the employee, use the **Send Back** button, and enter a description of the changes required. *By approving the spend authorization, you are authorizing the use of your budget for the travel expense.*

Business Meals	10.00	**Spend Authorization Line**	
		Expense Item	* Business Meals
		Quantity	* 1
		Per Unit Amount	* 10.00
		Total Amount	* 10.00
		Memo	(empty)
		Worktags	
		*Function	PR006 Institutional Support
		*Cost Center	CC6408 Financial Services - Accounts Payable
		*Fund	FD001 University Operations - Unrestricted
		Additional Worktags	(empty)

[Approve] [Send Back] [Cancel]