

Creating an Expense Report in Workday

Step-by-Step Instructions for Submitting Mileage
Expenses



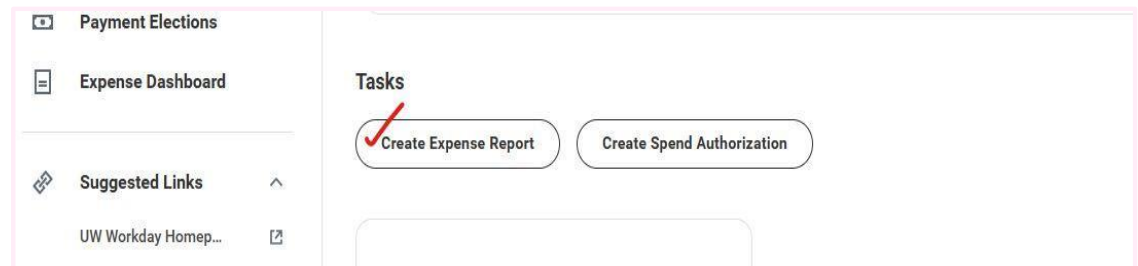
Access the Expenses Hub

- From the **Workday homepage**, click **Menu**.
- Select the **Expenses Hub** app.



Create an Expense Report

- ▶ Click Create and Expense Report
- ▶ Enter and review data in all required fields
- ▶ Click OK to continue



Funding String

Company	* UWWTW University of Wisconsin Whitewater	
Expense Report Date	* 08/12/2025	?
Business Purpose	* **Hold - In Progress	?
Company on Expense Line	* UWWTW University of Wisconsin Whitewater	
Program	PG000004383 UWWTW COEPS Office of Field Experiences	?
Grant		
Project		
Gift		

Cost Center

* CC001476 UWWTW | COEPS | Office of Field Experiences

Fund

* FD0102 GPO - Non-Doctoral Cluster

Function

* FN0200 Instruction

Additional Worktags

Location: UW Universities of Wisconsin > UW Whitewater > Winther Hall-0010

Date of Travel

Business Purpose= Hold in Progress

Funding String:
Program: PG 000004383
Cost Center: CC001476
Fund: FD0102
Function: FN0200

Business Purpose

- **Change the Business Purpose to “Hold – In Progress”**

You may use **Save for Later** at any time, regardless of the Business Purpose, to save your report for future edits or corrections.



Add Attachments (If Needed)



Travel Maps and Itineraries are not required!

**DO NOT PROVIDE ANY ATTACHMENTS UNLESS
REQUESTED BY THE OCE!**

Adding Expense Lines

- Click the **Expense Lines** tab.
- Click **Add** to enter each expense item.

Enter the following information:

Expense Date: Travel date

Expense Item:

Choose from the list or type “Mileage”

Memo: Enter one of the following:

- ST Doe, John (*for Student Teaching*)
- PRE-ST Doe, Jane (*for Pre-Student Teaching*)

* *Memo area serves as Itinerary*

The screenshot shows the 'Expense Lines' tab selected in the top navigation bar. Below the navigation bar, there is a blue 'Add' button with a red checkmark. To the left of the 'Add' button is a table with 3 items. The table has columns for 'Expense Date', 'Expense Item', and 'Amount'. The first item is 'Wed, Jun 4' with 'Mileage PRE-ST Observations' and '60.90 USD'. The second item is 'Tue, Jun 17' with 'Mileage Test Test Test DO NO APPROVE' and '23.52 USD'. The third item is 'Tue, Jun 17' with 'Mileage ST OBS 2 Doe, Jane' and '35.35 USD'. To the right of the table is a form to add a new expense line. The form has a 'Drop files here' area with a 'Select files' button. Below this is the 'Expense Line' section with fields for 'Expense Date' (06/04/2025), 'Expense Item' (Mileage), 'Rates Used' (0.7), and 'Total Amount' (60.00). To the right of the form is a box containing 'Fund: FD0102', 'Function: FN0200', 'Currency: USD', and a 'Memo' field.

Expense Date	Expense Item	Amount
Wed, Jun 4	Mileage PRE-ST Observations	60.90 USD
Tue, Jun 17	Mileage Test Test Test DO NO APPROVE	23.52 USD
Tue, Jun 17	Mileage ST OBS 2 Doe, Jane	35.35 USD

Expense Line

Drop files here
or
Select files

Expense Date * 06/04/2025 ?
Expense Item * x Mileage ?
Rates Used 0.7
Total Amount 60.00

Fund: FD0102
Function: FN0200
Currency: USD
Memo *

Verify Cost Information

Ensure the following fields are correctly entered:

- **Company:** UWWTW
- **Program:** PG000004383
- **Cost Center:** CC001476
- **Fund:** FD0102
- **Function:** FN0200
- **Ignore:** Additional Worktags

A screenshot of a financial system form with the following fields and values:

- Currency:** USD
- Memo:** (empty field with a red asterisk and a help icon)
- Company:** UWWTW University of Wisconsin Whitewater (selected from a dropdown menu)
- Program:** PG000004383 UWWTW | COEPS | Office of Field Experiences (selected from a dropdown menu)
- Grant:** (empty field)
- Project:** (empty field)
- Gift:** (empty field)
- *Cost Center:** CC001476 UWWTW | COEPS | Office of Field Experiences (selected from a dropdown menu)
- *Fund:** FD0102 GPO - Non-Doctoral Cluster (selected from a dropdown menu)
- *Function:** FN0200 Instruction (selected from a dropdown menu)
- Additional Worktags:** Location: UW Universities of Wisconsin > UW Whitewater > Winther Hall-0010 (selected from a dropdown menu)

Enter Mileage Details

- **Origin Address:**

- Your **home address** or
- Williams Center, Schwager Drive, Whitewater, WI, USA (if closer)

- **Destination Address** (Enter in this order-Examples):

- **School Name:** Eagle Elementary School, Eagle, WI
- **Street:** 810 E Main St
- **City:** Eagle, WI
- **County:** Waukesha County, WI

- **Round Trip?:** Check box if applicable





Add More Expense Lines

- **Mileage calculates automatically.**
- Click **Add** to enter additional expense lines.
- Repeat steps for each travel date or location.
- Enter an expense line for each destination:
 1. Williams Center to Eagle Elementary
 2. Eagle Elementary to Whitewater Middle School
 3. Whitewater Middle School to Williams Center
- **DO NOT** click **Submit** until all expense lines have been entered.

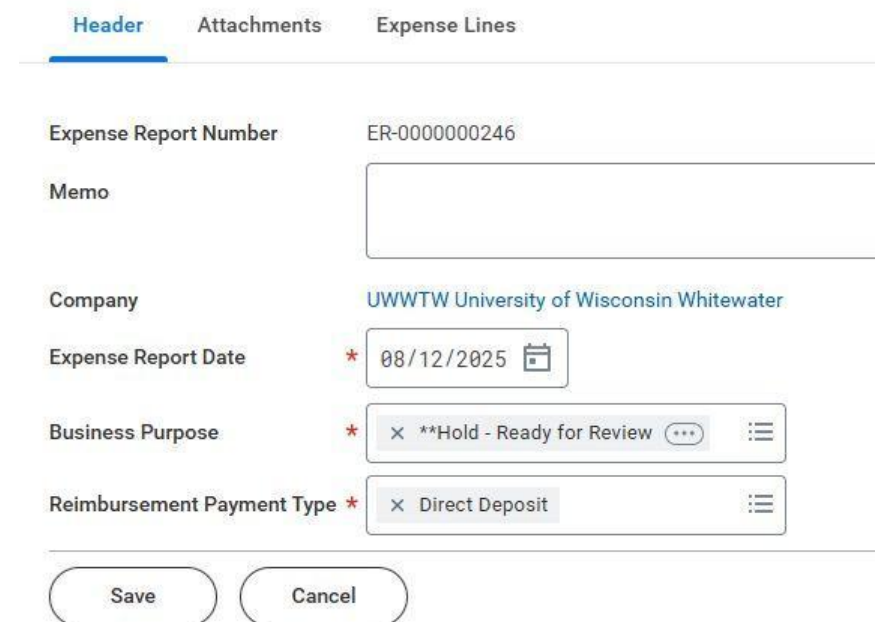
Final Step-Review and Submit

While you're working on your expense report use Hold – In Progress Works the same as selecting *Save for Later*.

When you are ready to submit your completed expense report:

1. return to your Header Tab,
2. scroll to bottom,
3. select “edit”
4. change the Business Purpose to ****Hold-Ready for Review**
5. then **Submit**.
6. disregard the error message “expense report cannot be submitted with a “Hold” business purpose...”

OCE will then review your expense report and notify you if there are changes via Outlook.



The form is titled 'Expense Report' and has three tabs: 'Header' (selected), 'Attachments', and 'Expense Lines'. The 'Header' tab contains the following fields:

- Expense Report Number:** ER-0000000246
- Memo:** (empty text box)
- Company:** UWWTW University of Wisconsin Whitewater
- Expense Report Date:** 08/12/2025 (with a calendar icon)
- Business Purpose:** **Hold - Ready for Review (with a dropdown menu icon)
- Reimbursement Payment Type:** Direct Deposit (with a dropdown menu icon)

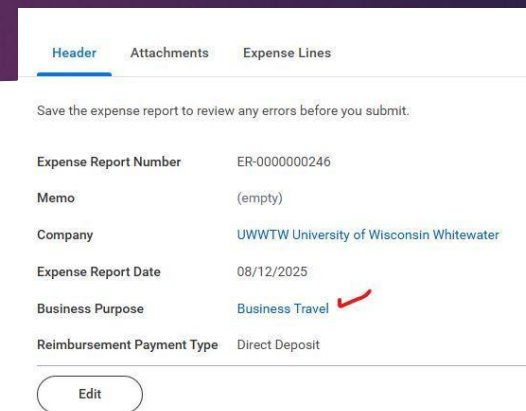
At the bottom of the form are two buttons: 'Save' and 'Cancel'.

Approved

When you hear from OCE your Expense Report has been approved via Outlook:

- Log back into Workday
- Return to your Expense Hub
- Select your Draft Expense Report
- Scroll down for “Edit”
- Change the Business Purpose from **Hold-Ready for Review to Business Travel.
- Then simply press submit, and your expense report moves to the next approver.

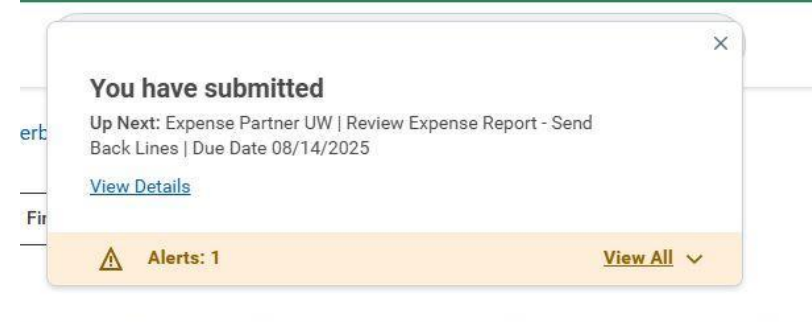
You should expect to see a window pop-up showing your expense report has been submitted.



A screenshot of an expense report form in a web application. The form has three tabs: 'Header' (selected), 'Attachments', and 'Expense Lines'. Below the tabs is a message: 'Save the expense report to review any errors before you submit.' The form fields are as follows:

Expense Report Number	ER-0000000246
Memo	(empty)
Company	UWWTW University of Wisconsin Whitewater
Expense Report Date	08/12/2025
Business Purpose	Business Travel ✓
Reimbursement Payment Type	Direct Deposit

At the bottom of the form is an 'Edit' button.



A screenshot of a pop-up window titled 'You have submitted'. The window contains the following text:

You have submitted

Up Next: Expense Partner UW | Review Expense Report - Send Back Lines | Due Date 08/14/2025

[View Details](#)

At the bottom of the pop-up is a yellow bar with a warning icon, the text 'Alerts: 1', and a 'View All' link with a dropdown arrow.



Questions

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