



JWA Workday Training

Approving Expense Reports - Desktop

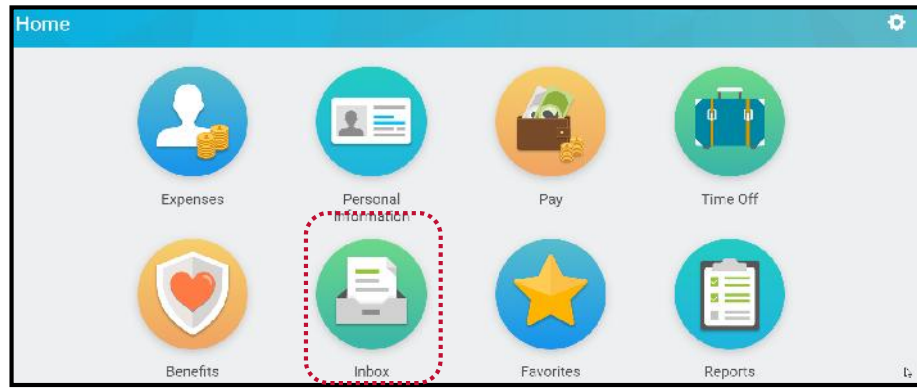
Approving Expense Report via Desktop

This module covers:

- Accessing Submitting Expense Report
- Reviewing Expense Report
- Approving or Sending Back

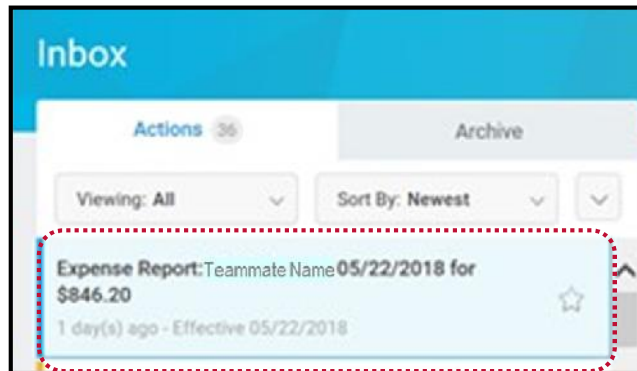


Expense Worklet on Home Page



After Logging In, on the Home Page, select the “**Inbox**” Worklet or select “**Inbox**” via your Profile Menu.

Accessing Inbox Message



In the **"Inbox"** **"Actions"** Tab, click on the inbox message for the submitted expense report.

Expense Report – Main Page

Review

Expense Report: Teammate Name on 05/22/2018 for \$846.20 [Actions](#)

1 day(s) ago · Effective 05/22/2018

For

Expense Report: EXP-00000123

Overall Process

Expense Report: Teammate Name on 05/22/2018 for \$846.20

Overall Status

In Progress

Details to Review

Expense Report Information

Company

JW Aluminum Company



Clicking on the “**Actions**” line item opens the Expense Report in the main section of the screen. **Review the Expense Report.**

Expense Report Details


Click here to sort

05/07/2018	41.20
Meals (During Travel)	
05/08/2018	55.00
Office Supplies	
05/08/2018	750.00
Airfare	

Attachments

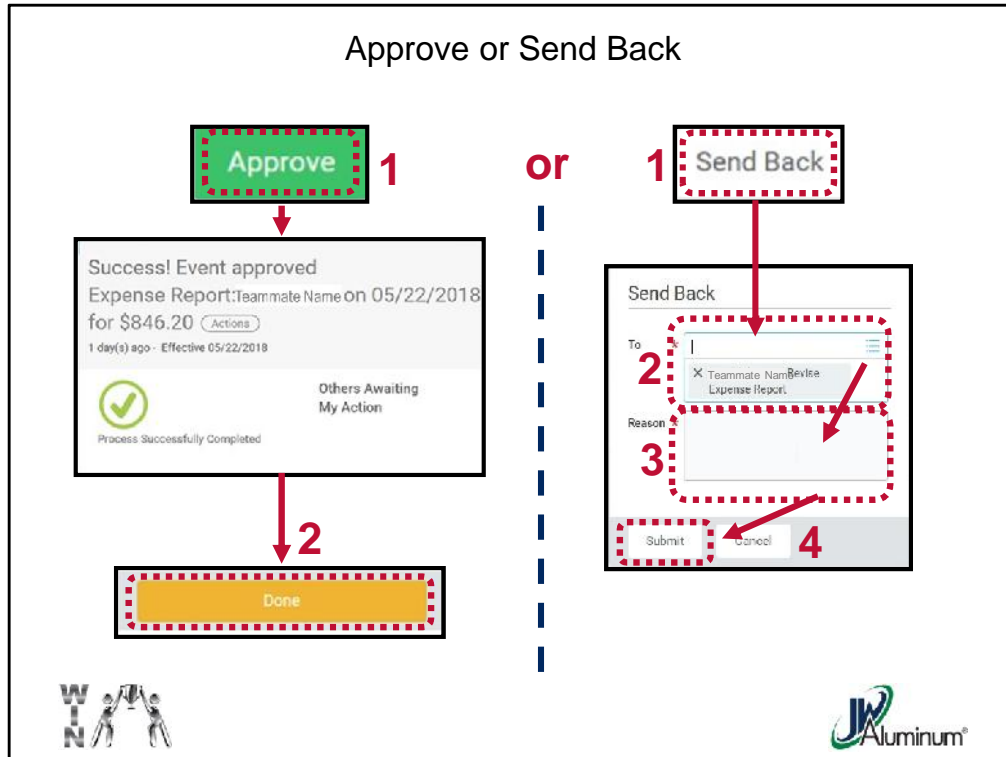
Receipts

Expense Report Line 05/08/2018: Office Supplies - 55.00 USD

 IMAGE.JPG
Uploaded by [Teammate Name](#) 1 day ago



Scroll down to review the individual expenses and attachments. You can click on any attachment for a deeper review.



After Review there are two basic options, to “**Approve**” or “**Send Back**” for further information.

If Approving:

1. Click “**Approve.**” A confirmation screen will appear indicating Success.
2. Click “**Done**” to close the session.

OR

If Sending Back:

1. Click “**Send Back.**”
2. In the “**To**” section, click the **Dropdown** menu and **select the recipient(s).**
3. State the “**Reason**” for the Send Back.
4. Click “**Submit.**”