

## Expenses Hub Overview

This Quick Reference Guide (QRG) walks **Employees** through using the Expenses Hub app. The Expenses Hub should automatically display in your list of Apps under Menu. If it is not displayed, you can add it via the **Add Apps** button at the bottom of the Apps menu (Menu > Apps).

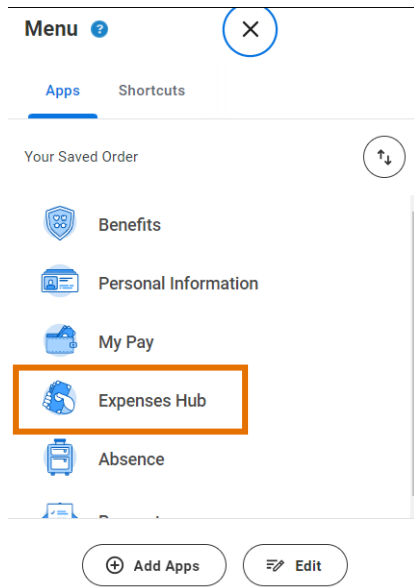


The Expenses Hub replaces the Expense app. While you can still use the Expenses app, you may want to switch to the Expenses Hub since eventually the Expenses app will be sunset from Workday.

## Using the Expenses Hub app

On the **Workday Home** screen:

1. Click **Menu**, then **click Apps**.
2. Select **Expenses Hub**.



You can change the order of your apps by clicking the **Edit** button at the bottom of the Menu.

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On the **Expense Hub** screen:

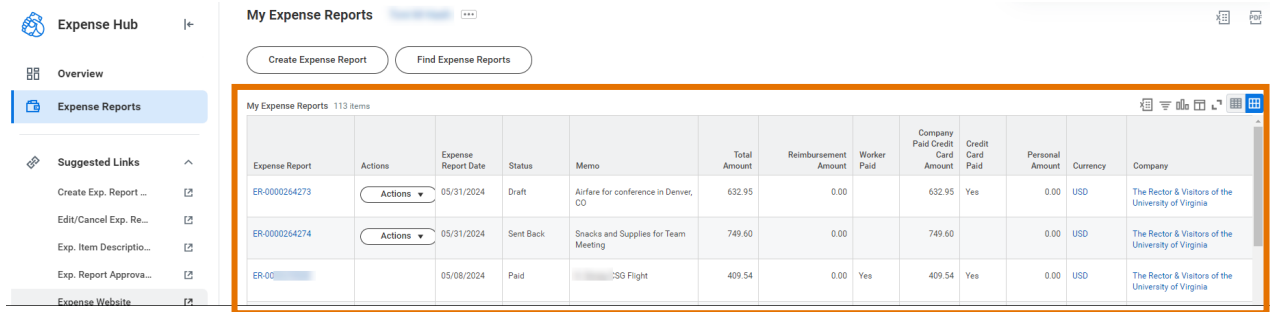
- A. Options that display on the far-left side of the hub:
  - **Overview** – displays by default when you open the Expenses Hub app. The Overview includes *Tasks*, *Expense Reports to Submit* and *Transactions to Expense* in the main hub window.
  - **Expense Reports** – select to view a list of your expense reports. You can filter by status and date. (This is the same as the View My Expense Reports link)
  - **Suggested Links** – provides links to a variety of helpful resources such as expense websites and Quick Reference Guides (QRGs). Select a link to go to that resource.
- B. **Tasks** – provides buttons for creating a new expense report or spend authorization.
- C. **Expense Reports To Submit** – lists any Expense Reports that require your attention. These include expense reports in Draft format or those that have been sent back to you by an approver.
- D. **Transactions To Expense** – lists any outstanding transactions. These include T&E credit card transactions and quick expenses.

The screenshot displays the Expense Hub interface. On the far-left side, there is a navigation menu with the following items: Expense Hub (with a home icon), Overview (highlighted with a blue bar and an orange 'A' badge), Expense Reports, Suggested Links (with a list icon), and a list of links: Create Exp. Report ..., Edit/Cancel Exp. Re..., Exp. Item Descriptio..., Exp. Report Approva..., Expense Website, Find Expense Amba..., and T&E Card Website. The main content area features a header with a building image and a notification: 'Fiscal Year End Close Dates for Workday Expenses June 14 & 21' with a 'Read More' link. Below this is a 'Tasks' section (with an orange 'B' badge) containing two buttons: 'Create Expense Report' and 'Create Spend Authorization'. The 'Needs attention' section is divided into two panels. The 'Expense Reports To Submit' panel (with an orange 'C' badge) shows two reports: a 'DRAFT' report for 'Airfare for conference in Denver, CO' with a total of \$632.95, and a 'SENT BACK' report for 'Snacks and Supplies for Team Meeting' with a total of \$749.60. A 'View My Expense Reports' link is at the bottom. The 'Transactions To Expense' panel (with an orange 'D' badge) shows a list of transactions: '05/21/2024 - AMAZON.COM\*1...', '05/21/2024 - AMZN Mktp US - 1...', '05/21/2024 - AMAZON.COM\*PFS431AS3 - 1...', and '05/20/2024 - AMZN Mktp US - 1...'. A 'More (9)' button is at the bottom.

On the **Expense Hub** screen (on the far-left side):

3. Select **Expense Reports** to view the *My Expense Reports* report.
  - This report lists all of your expense reports and can be filtered by status and date.
  - It is the same report that displays when you click the *View My Expense Reports* link from the Overview screen under Needs attention.


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- After reviewing your reports, select **Overview** on the left side of the screen to return to the Expense Hub Overview screen.

Under **Overview > Tasks:**

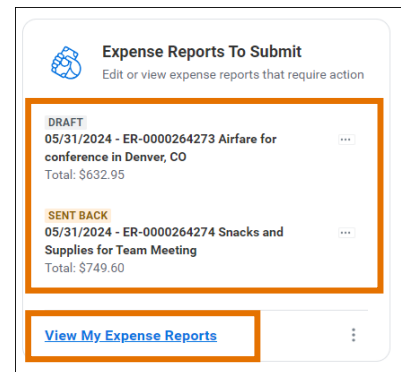
- Click the **Create Expense Report** button to create a new expense report.



See the [Create Expense Report QRG](#) for detailed steps to create and submit expense reports.

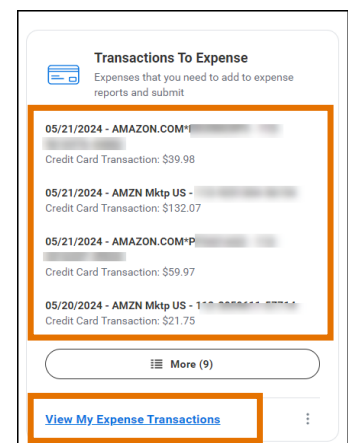
Under **Overview > Expense Reports To Submit:**

- Select an expense report from the list to open that expense report and edit as needed.
- Click **View All Expense Reports** to view the *My Expense Reports* report. From this report, you can view all of your expense reports and filter by status and date.
- After viewing your reports, select **Overview** on the far-left side of the screen to return to the Expense Hub Overview.



Under **Overview > Transactions To Expense:**

- Select a transaction from the list to see more details about that transaction.
- Click **View My Expense Transactions** to view the *My Expense Transactions* report. This report lists all of your transactions (T&E credit card and/or Quick Expenses). You can filter the report by transaction status, date, merchant, and transaction amount.
- After viewing your transactions, click the **Back** button in your Browser to return to the Expense Hub Overview.



You have successfully completed this task.