How to submit an expense report through Workday for LTER travel to and from the Eastern Shore.

1. Log into Workday.
2. In the search bar, type “Create Expense Report”.
3. Click the “Create Expense Report” link that shows up in blue.
4. Fill in a title for the report in the “Memo” section. (Travel from Charlottesville to the LTER in Oyster, VA, LTER research supply, etc.)
5. Fill in the first date of travel as the “Date”.
6. In the “Grant” box, select My Worktags, then click the little circle in front of the grant info you want to use (e.g., the LTER core grant is GR012064 GA11374-160030-101-AS ENVS LTER: Climate drivers, dynamics, and consequences of ecosystem state change in coastal barrier systems). (THE COMPLTETE WORKTAG FOR **LTER GR012064 FD021 FN009 AWD00179 CC00063**).
7. The remaining starred boxes on this page should auto populate. Click the orange “OK” button at the bottom of the page to go to page 2.
8. On the next page, there are three tabs at the top (Header, Attachments, and Expense Lines). You only need to add to the Expense Lines tab.
9. Click the orange “Add” button to put in an expense.
10. Select or drag and drop files (e.g., toll receipts) related to the expense.
11. Fill in the date of the toll.
12. In the “Expense Item” box, type “toll” and hit enter to search. Select the “Toll |Domestic” option that pops up.
13. Enter the Total Amount (i.e., cost) for the toll.
14. In the “Memo” box, describe the toll – e.g., Chesapeake Bay Bridge Tunnel toll.
15. Info further down the page should auto populate with the grant info.
16. Click the orange “Add” button on the top left to get the first expense item (the toll) to populate the left side overview panel of expense items, which will also bring up a new “Expense Line” form like the one you just filled out to add another expense (e.g., second toll, mileage).
17. A map is no longer needed
18. Enter the date the trip started.
19. For the “Expense Item” type in “mileage” and select the “Mileage” option that pops up.
20. “Quantity” is the number of miles; enter “400”.
21. On the right side of the page, for “Vehicle Plan”, select “Athletics”. Once it is selected, the “Rates Used” and “Total Amount” should auto populate on the left side. The grant info should also auto populate. (Athletics fits the rate that the LTER uses for routine travel to the shore)
22. Click the orange “Add” button at the top left to ensure the expense line is added to your report (it should populate the left side panel with overviews of each expense item).
23. Ensure all your entries for this report show in the left panel. Click the orange “Submit” button on the bottom left. A confirmation window will pop up and tell you who will be reviewing your report and when.

If you need to be reimbursed for lab supplies, click add and follow instructions above. Except for the “spend category” type lab and the chose “Other Lab Supplies”.

You vehicle mileage reimbursement should be less than or equal to 136.00.