Workday Mobile Expense Management

Get the Workday Mobile App

1. Download the Workday app from your mobile device’s app store.

2. After installation, use the Workday icon to launch the app. If prompted for permissions, click OK or Accept.

3. Enter “yale” when prompted for your tenant. You will be redirected to a CAS login screen. Log in as normal.

4. Create a 6- to 8-digit PIN as directed. This 90-day PIN will allow faster access to the Workday app.

5. Enter your PIN and click the checkmark; repeat when prompted. You are now logged in. Remember to log out when finished.

For help with installation, contact the ITS Help Desk at 203-432-9000.

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Creating an Expense

1. Tap the Expenses worklet.

2. Click on New Expense.

3. Tap the camera icon to take or upload a photo. You may add multiple images to an expense.

4. Enter date, expense item, amount, and memo (description).

5. Tap Done. The expense item is now available through the browser and mobile app, and can be added to an expense report.

Note: Delegated expense preparers can only access expenses through the web browser (not the mobile app).

Approving an Expense Report

1. Tap the Inbox worklet.

2. Under the Actions tab, scroll to find the task Expense Report for [Name] and tap.

3. Scroll through the expense report to review the information provided by the submitter, including the Memo field and attachments.

4. When finished, tap the green button to Approve. Or, tap the gray More ... button to access other actions, such as Send Back.

To see full Chart of Accounts (COA) details for itemized expenses, log in using a web browser.