


Workday Mobile Expense Management



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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.

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