

Overview

This document includes frequently asked questions raised during FST Friday sessions broken down by topic, along with detailed answers provided by subject matter experts.

Create Expense Report – Fields/Memo/Receipts

Q: What happens if an expense report is over 30 days old? (Currently in Oracle, we have to post a comment/reason and routing for approval is a little different.)

A: If an expense report is over 30 days old, the individual submitting the report must provide a purchase justification in the expense report. The expense report will not route to their manager for approval anymore since we have removed that requirement. A monthly report will be sent to the senior finance department approver for expenses within their department that were submitted over 30 days old.

Q: How can we reimburse a student - employee (wage) or non-employee (stipend) - for a purchase?

A: If a student is an employee, they will be a contingent worker in the system, which means they can submit an expense report for reimbursement, or someone else can create an expense report for them. If a student is a non-employee, payments will be submitted via supplier invoice request.

Q: What is the difference between "Create New Expense Report," "Copy Previous Expense Report," and "Create New Expense Report from Spend Authorization"?

A: An employee who has an existing spend authorization should tie it to the expense report by selecting "Create New Expense Report from Spend Authorization." This is rare; most of the time, an employee will not have a spend authorization. If there is no existing spend authorization, the employee will select "Create New Expense Report" to create a report from scratch or, if the expense report they wish to create is very similar to one they have created in the past, they can select "Copy Previous Expense Report."

Q: Does the memo carry over into any reporting?

A: Yes, the memo field in an expense report copies over into all expense related reports in Workday.

Q: Can we upload the receipts without using the Workday mobile app?

A: It is possible to upload a receipt without using the Workday mobile app. You can add a receipt as an attachment by uploading it from your desktop; however, the information in the receipt will not be picked up by the system via scan as it would if you were to use the Workday mobile app.

Q: Which reports in Workday provide a list of all expense reports for a given cost center over a given period of time?

A: Many financial users will have access to the **Find Expense Report** and **Find Expense Report Lines for Organization** reports, which provide this information. You can access these reports via the Workday search bar.

Medical School Access to Expense Reports

Q: Will we be able to submit expenses for Medical Center and UPG employees through Workday starting in July, or will we still be using the paper form?

A: If a Medical Center employee seeks a Rector & Visitors of the University of Virginia reimbursement, they can submit the expense report in Workday. A UPG employee can submit any expense report through Workday. Beginning July 1, paper forms will no longer be used.

Q: Will all UVA staff be listed for reimbursement regardless of where they are paid from (i.e., Medical Center, School of Medicine, etc.)?

A: All UVA staff will be listed for reimbursement in Workday for reimbursements from Rector & Visitors of the University of Virginia. Medical Center reimbursements will occur within the Medical Center's expense system.

Business Process Steps and Approval Actions

Q: In the Expense Report business process, is the Expense Support Specialist the only approval after submission?

A: When submitting an expense report, the report will route to the Expense Support Specialist first for approval. Additional approvers will also be triggered based on certain criteria on the expense report line (P2P Approver, Grant Manager, Unit Gift Manager, Project Budget Specialist). In certain cases, the expense report may route to the Senior Department Finance Approver or Expense Partner for review and approval.

Q: What security roles can edit on the approved report?

A: Expense Support Specialists can edit all fields of an expense report. Other approvers can send back an expense report to the initiator but cannot edit the report.

Q: Will approvers have the ability to correct PTAOs or expenditure types/worktags?

A: The approver of an expense report can only approve or reject the report; they are not able to make any revisions. Only the Expense Support Specialist can make changes to the report.

Q: How much time do you have after an expense report is approved to cancel it before it hits your accounts and the employee is paid?

A: You can cancel expense reports in Draft, In Progress, or Approved status, up until the expense report is paid.

Training – Availability/Access to Materials

Q: Is there a way to request in-person classes as opposed to classes held on Zoom?

A: We offer instructor-led training via Zoom, as well as web-based training in Workday Learning, which can be taken at your own pace. All training is role-based (want to know more about roles? [Check out our "Day in the Life" Security Role Summaries](#)). If you need assistance with Zoom session or have a request for in-person classes, please reach out to _____.

Q: Where can I find a full list of Quick Reference Guides?

A: Quick Reference Guides can be found on the following webpage:
<https://uvafinance.virginia.edu/workday-finance-training>

Procurement – UVA Marketplace and Creation of Carts

Q: As a Procurement Shopper, can I edit a cart that an employee assigns to me?

A: Yes, Procurement Shoppers can edit carts assigned to them by another employee.

Q: Will non-employee sponsored account holders have access to UVA Marketplace?

A: Only employees of the University of Virginia will have access to UVA Marketplace.

Q: If a cart is assigned to a Procurement Shopper, will the requestor/assigned Procurement Shopper be able to change the assignee?

A: A Procurement Shopper can reassign a cart to another Procurement Shopper in Jaggaer.

Delegation

Q: Can current delegations in Chrome River carry over to the new system, or do we have to set each of them up again?

A: Current delegations will not carry over. You will need to set up delegations in the new system.

Q: How can you assign a delegate to prepare a report on your behalf?

A: To assign a delegate to run a report on your behalf, search for the **My Delegations** report in the Workday search bar. Click the **Manage Delegations** button and enter the name of the delegate into the **Delegate** field. Enter **Create Expense Report** in the **Start On My Behalf** field.

Q: Will delegates receive all inbox emails sent for tasks to be completed/approved as they do now for HR tasks in Workday?

A: The types of inbox tasks your delegate receives will depend on how you set up delegation in the **My Delegations** report. You can choose the inbox tasks you wish your delegate to receive on your behalf in the **Do Inbox Tasks On My Behalf** field on the **Manage Delegations** screen.

Q: If an employee uses a delegate, will the expense report route to the employee to approve before it routes to the Expense Support Specialist to review and approve?

A: Yes, the employee will be the first approver of the expense report.

Security Role Assignments and Access

Q: Will all graduate students, regardless of how they are funded, have the role "Employee as Self"?

A: If a graduate student is a worker, they will have the "Employee as Self" role.

Q: When and how will we find out what security role we will hold after go-live?

A: Security role assignments have been shared with unit managers. If you believe you have a security role in Workday but have not yet been informed of your role, contact your manager to schedule a conversation about security role assignments.