

## PROFESSIONAL DEVELOPMENT EXPENSES – FACULTY ONLY

When creating an expense report in Workday that includes expenses related to your professional development funds, enter the **Additional Worktag** of Professional Development PD – your name. You may choose to add the worktag on the header (figure 1 below) or for each expense line added to a single report (figure 2)

The image displays two screenshots of the Workday 'Create Expense Report' interface. The left screenshot shows the 'Expense Report Information' section with various fields like Company, Date, and Fund. The right screenshot shows the 'Expense Lines' section with a detailed view of an expense line. Red arrows point from the 'Additional Worktags' field in the left screenshot to the 'Additional Worktags' field in the right screenshot.

**Expense Report Information**

Expense Report For \* Employee: Sean Fogarty

Creation Options

- Create New Expense Report
- Copy Previous Expense Report
- Create New Expense Report from Spend Authorization

Memo

Mathematics Today Conference, Aug 5-9, 2019, Chicago IL

Company \* X Simmons College Company

Expense Report Date \* 07 / 24 / 2019

Business Purpose

Cost Center \* X 510015 Comptroller's Office

Fund \* X 111 Operating

Program \* X 500 Institutional Support

Project

Line of Business \* X LOB002 Traditional

Additional Worktags X Professional Development:

**Create Expense Report**  
ER-0014107 Math Today conf Aug 22-25, Chicago (Actions)

Header Attachments Expense Lines

Add

1 item

**Expense Line**

Date \* 07 / 24 / 2019

Expense Item \* X Conference/Registration Fee

Quantity \* 1

Per Unit Amount \* 250.00

Total Amount \* 250.00

Currency \* USD

Memo

\*Cost Center X 510015 Comptroller's Office

\*Fund X 111 Operating

\*Program X 500 Institutional Support

Project

\*Line of Business X LOB002 Traditional

Additional Worktags X Professional Development:

Just enter your last name in the field and will populate with the PD worktag.

### *Can my expense report include non-PD related expenses?*

Yes, it can. For any item not PD related, simply do not use the additional worktag for that line item. If you entered the tag on the header, you may remove it from any expense line. Conversely, add the tag to any expense lines if you did not use it on the header. If itemizing an expense – you can use the PD tag on a portion of the total when itemizing.

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**NEW for AY19/20** – Customization has been created in WD specific to PD funds for expenses. For your department to better track PD funding, you may now choose the EXPENSE ITEM “PD-...” that relates to the expense.

These expense items have been established and are mapped internally in WD for reporting purposes.

So, if you are spending your PD funds for a conference fee and its related travel, you will choose those PD expense items when you create your report, etc. Just enter “PD” and a list of expense items will appear. Choose the correct one.

The screenshot shows the 'Expense Line' form with the following fields and values:

- Date: 09 / 19 / 2019
- Expense Item: PD
- Total Amount: \*
- Currency: \*
- Memo:
- \*Cost Center:
- \*Fund:
- \*Program:
- Project:
- \*Line of Business:
- Additional Worktags:

A search dropdown menu is open for the 'Expense Item' field, showing 7 results:

- PD - Books, Subscriptions - NonLibrary
- PD - Conference/R egistration Fee
- PD - Group Meals
- PD - Lodging/Meals/Other - Employee
- PD - Membership Dues
- PD - Non Instructional

This, along with the Additional Worktag will better aid in tracking your PD funding expenses.