



# Receipt Scanning

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# Receipt Scanning

## □ What?

- ▣ Receipt scanning uses optical character recognition (OCR) to capture details from a receipt with 85% accuracy
- ▣ Data fields captured are amount, currency, date, and merchant
- ▣ Images uploaded through the Workday mobile app create a quick expense that can be linked to an expense report line
- ▣ Quick expenses can be created for expenses paid with LaCarte credit cards and out of pocket
- ▣ Reimbursement or reconciliation does not occur until the quick expense is linked to an expense report and fully approved

# Receipt Scanning

## □ Where?

- ▣ Workday mobile app, which is available for free on Android and Apple devices
- ▣ Receipt scanning is not available from desktop

## □ Who?

- ▣ Employees
- ▣ Expense Data Entry Specialists
- ▣ Delegates
- ▣ Not available for ECMs/Non-Worker

# Receipt Scanning

## □ When?

- ▣ Receipt scanning will be enabled in the Workday mobile app on Tuesday, July 15
- ▣ Job aids will be released closer to go-live that detail how to set up the mobile app and how to use receipt scanning

## □ Why?

- ▣ Foundation for additional features, such as 'AI recommended and defaulted expense items'
- ▣ Minimum of 3,000 scanned receipts are required to enable 'AI recommended and defaulted expense items'

# Mobile Demo

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- Capture New Image
- Upload Saved Image
- Upload PDF/Email

# Desktop Demo

- Expenses Hub
  - ▣ Expense Transactions
  - ▣ Edit My Expense Transactions
- Delegate – Create Expense Report (on behalf of)
- Employee – Create Expense Report
- Expense Data Entry Specialist – Create Expense Report for Worker

# Reminders

- Users should provide itemized receipts
- Users should keep all receipts until the expense report is approved
- Users should recapture photos if blurry/shaky – OCR may read the correct total, but approvers must be able to read all details