HOW DO I ... Delegate Approval of Expense Reports?

ABOUT THIS TASK: Describes how to delegate approval of an expense report.

AUDIENCE: Managers; Administration Leads. Individuals who need to delegate approval of Expense Reports.

DETAILED JOB AID: Delegate Inbox Items

Note: All values in screenshots are examples only and may not refer to actual data in Workday.

Note: This does NOT delegate accountability and can be set for a period of time.

1. On Workday's home page, in the Search field, type delegations.

2. Click My Delegations.

3. On the My Delegations page, click Manage Delegations.

4. Click to create a new line if a new line is not there already and in the Start Date and End Date fields, use the calendar drop-down to select the dates.

TIP: Leave the End Date field blank if the delegation is for an indefinite period of time.

5. In the Delegate field, enter the delegate’s name and select your chosen delegate.

6. Press tab to go to the next field. The delegate’s name populates the field.

In addition to a primary delegate, you must also specify an alternate delegate (system will use for any processes where there is a conflict of interest, e.g., delegate giving themselves additional compensation).

7. Check the Use Default Alternate field. The Alternate Delegate field automatically populates with delegate’s manager. Do not check if you want to manually enter an alternate delegate other than their manager.

8. In the Do Inbox Tasks on My Behalf field, select the For Business Process button.


TIP: Do not type Expenses, only type Expense.

10. Select the Retain Access to Delegated Tasks in Inbox checkbox. This enables both you and your delegate to access and act on the Expense Report during the delegation period.

11. Click Submit twice.

TIP: An Alert displays after the first Submit advising you give the delegate access to all of your previously created items of the same type.

12. Click Done to complete the delegation. The My Delegation page displays showing the new delegation.