HOW DO I ... Delegate Creating (reconciling) an Expense Report?

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

AUDIENCE: Managers; Administration Leads; Individuals who need to delegate initiating an expense report.

DETAILED JOB AID: Expense Delegation

Note: All values in screenshots are examples only and may not refer to actual data in Workday. 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 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. The End Date is the last day of the delegation (i.e., the delegation is effective on this date).

5. In the Delegate field, enter the delegate’s name and, once displayed, tab 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).

6. 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.

7. In the Start on My Behalf field, enter Expense, click return and then tab. The Create Expense Report populates the field.

   TIP: Do not type Expenses, only type Expense.

8. 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.

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