

How to delegate creation of expense reports to an administrative assistant.




Note: Select the Business Processes Allowed for Delegation tab from your My Delegations page to view which business processes you can delegate.

MANAGER – SET UP DELEGATION

VIEW YOUR INBOX

1. Click the **Inbox** icon near your Profile Photo.
2. Click the **Actions** tab to view your business process tasks, approvals, and to dos.

From the Actions tab:

1. Click the **More**  icon, then **My Delegations**.
2. Click **Manage Delegations**.
3. Enter the Begin Date and End Date for the delegation.
4. Select a user to delegate your tasks to in the Delegate field.
5. In the “Start On My Behalf” field, select By Business Process Type -> Expense Report Event
6. Select the **Retain Access to Delegated Tasks in Inbox** checkbox to view and modify your Inbox while delegated.
7. Click **Submit**. A confirmation displays. The delegation might require manager approval before it becomes active.
8. Click **Done**.

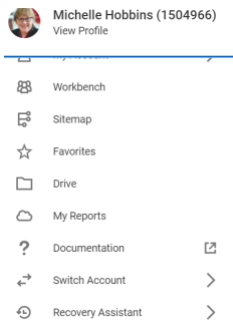
You will now function on behalf the manager until you “Switch Account” again.

ASSISTANT – CREATE EXPENSE REPORT

PERFORM TASKS DELEGATED TO YOU

From the workday home page:

1. Click on your Profile.
2. Scroll down to “Switch Account”



3. You will now function on behalf the manager. Type the task “create expense report” to create the expense report on behalf of the manager.

