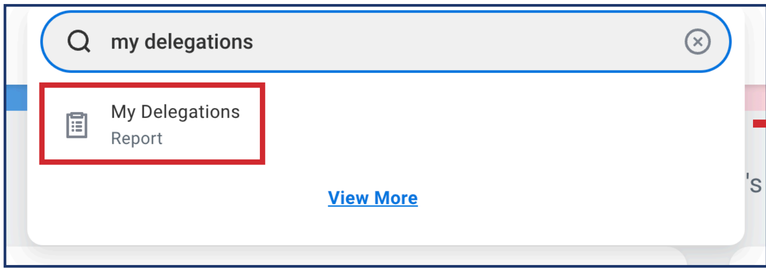
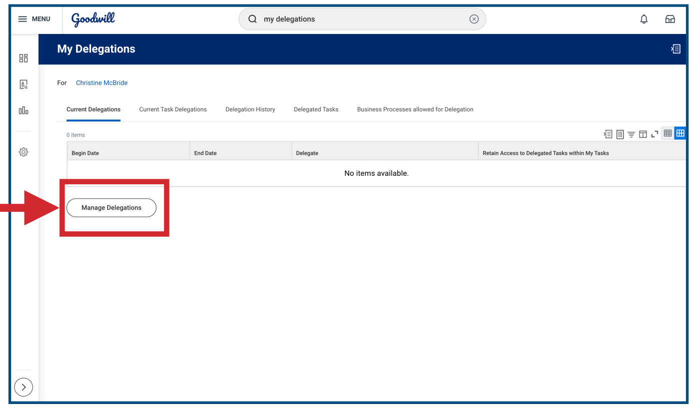
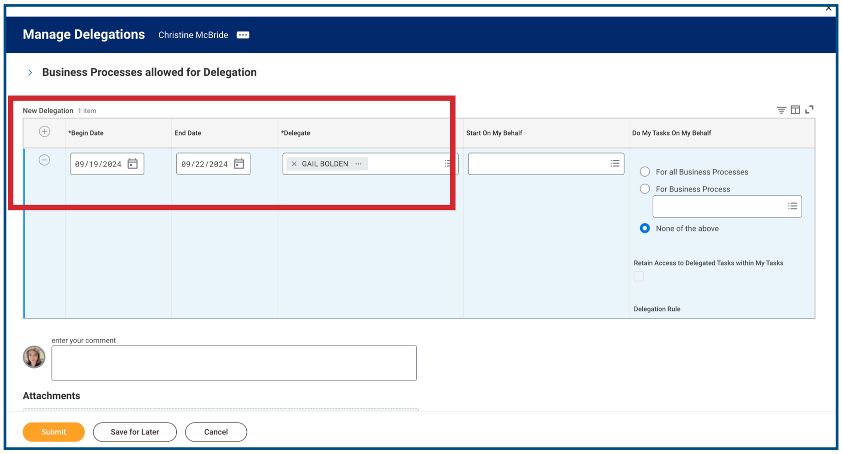
HOW TO ASSIGN AND MANAGE DELEGATIONS IN WORKDAY

1. Navigate to the Workday Search Bar and type “My Delegations” > Select the **My Delegations Report** > Click **Manage Delegations**

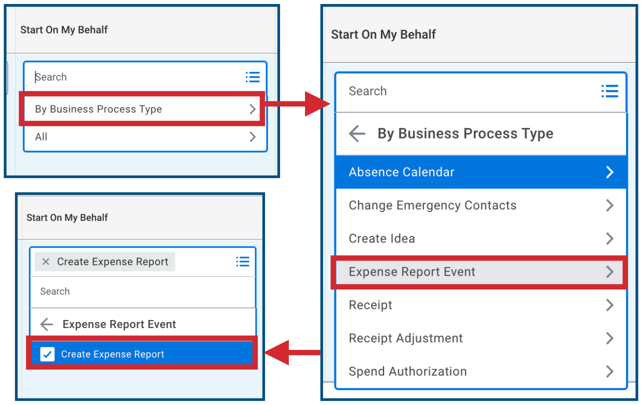




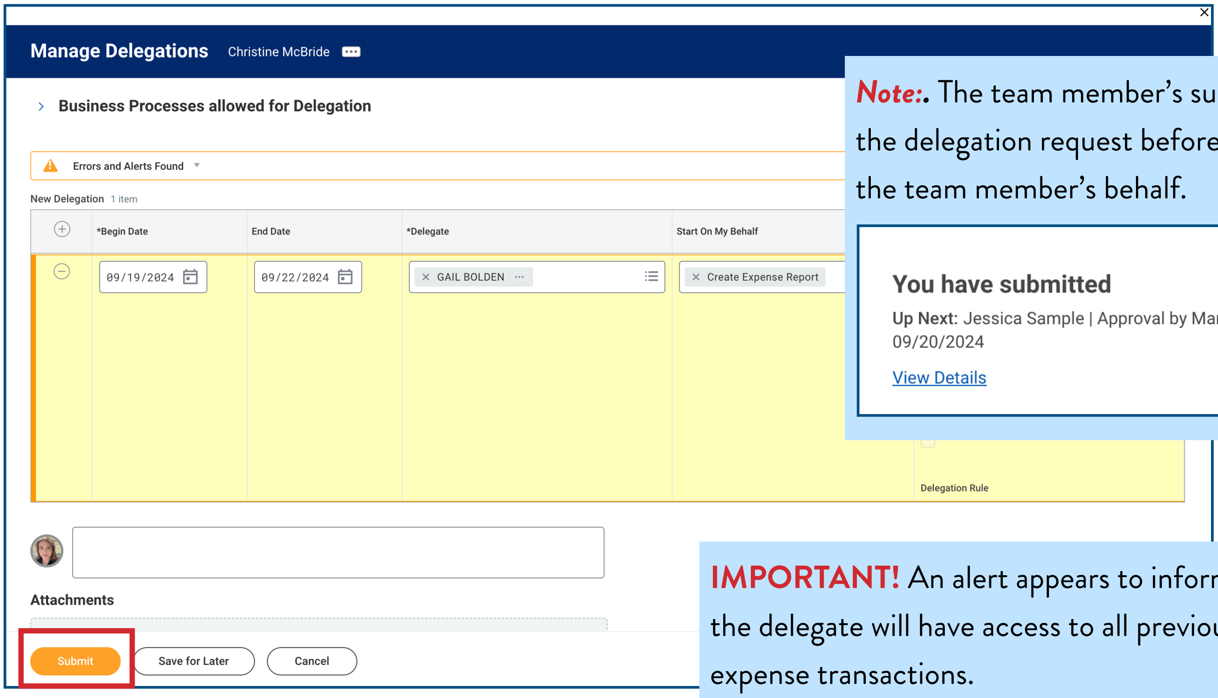
2. Select the **Begin** and **End Dates** and the appropriate **Delegate.**



3. Under *Start on My Behalf*, select **By Business Process Type > Expense Report Event > Create Expense Reports**



4. Click **Submit** > Click **Submit** again after the alert appears.



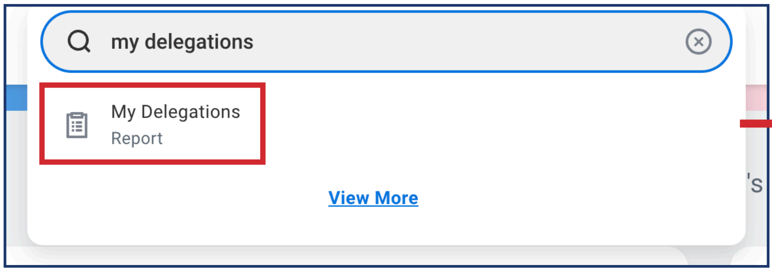
Note: The team member’s supervisor must approve the delegation request before the delegate can act on the team member’s behalf.

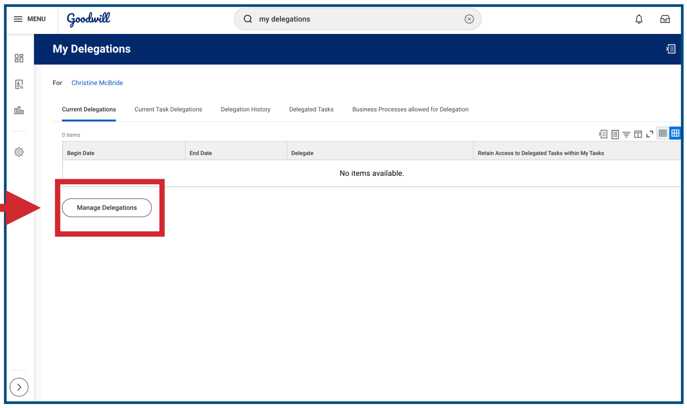
IMPORTANT! An alert appears to inform the team member that the delegate will have access to all previous expense reports and expense transactions.

GOODWILL

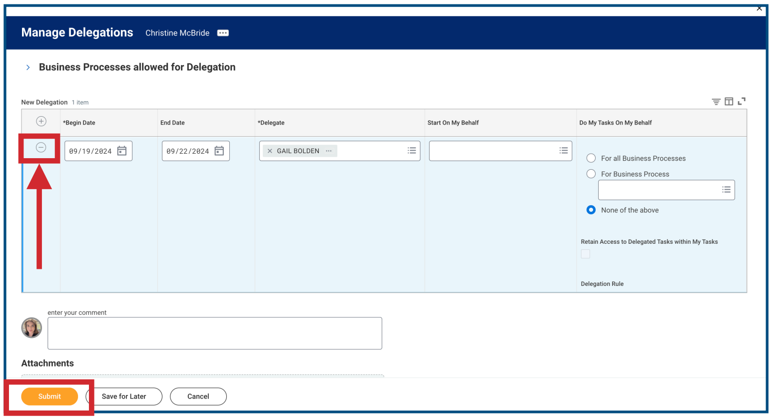
HOW TO REVOKE DELEGATION ACCESS

1. Navigate to the Workday Search Bar and type "My Delegations" > Select the **My Delegations Report** > Click **Manage Delegations**

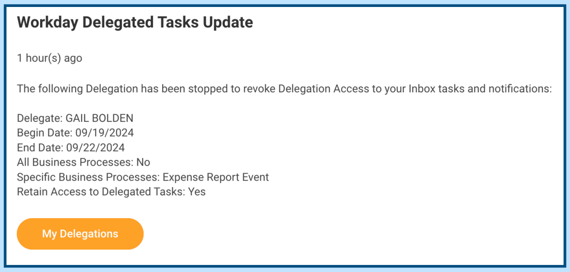




2. Click the **Minus Icon (-) > Submit**

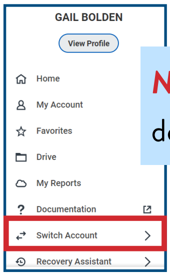


Note: The team member and the delegate will receive a notification in Workday that delegation access has been revoked.



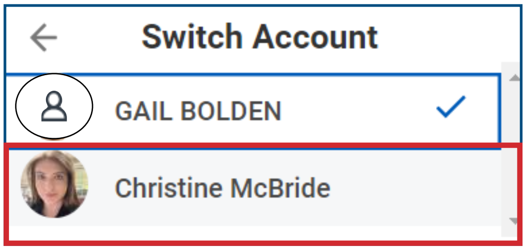
HOW TO CREATE EXPENSE REPORTS ON BEHALF OF A TEAM MEMBER AS A DELEGATE

1. Navigate to your Workday profile and click **Switch Account.**

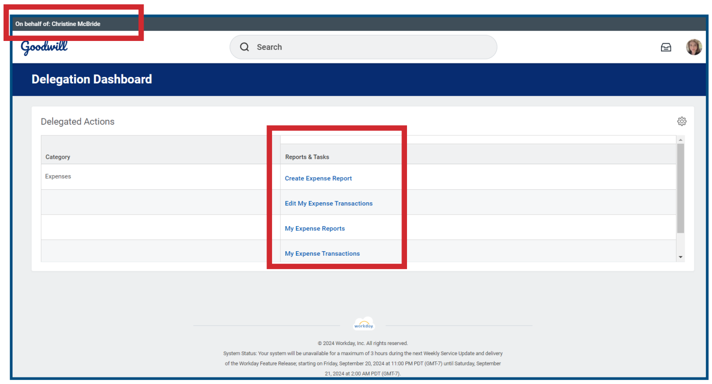


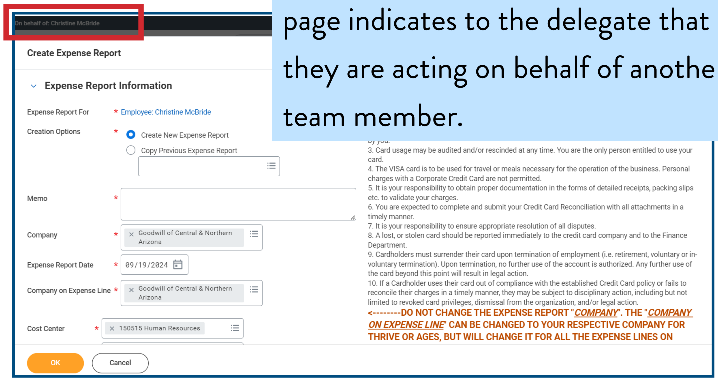
Note: Scroll down to view all options if you do not see the "Switch Account" option.

2. Click on the appropriate account to act on their behalf.



3. Click on the appropriate tasks and/or reports to act on behalf of the team member





Note: The banner at the top of the page indicates to the delegate that they are acting on behalf of another team member.

4. To return to your own Workday profile, click the photo icon of the team member whose behalf you are working, click switch accounts and then select the appropriate profile