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

≡ MENU Goodwill

Delegations

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	Ð,	For Christine McBride				
	000	Current Delegations Current Task Delegations	Delegation History	Delegated Tasks Busin	ess Processes allowed for Delegation	
Q my delegations	- 1	0 kerns				
	۲	Begin Date End Date		Dalegate		Retain Access to Delegated Task
				No item	s available.	
My Delegations Report	≯	Manage Delegations				
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- 2. Select the Begin and End Dates and the appropriate Delegate.
- Manage Delegations Christine McBride > Business Processes allowed for Delegation Start On My Behalf Start On My Behalf **≣ ⊡ .**" = Search *Begin Date Fed Date *Delegati Do My Tasks On My Rebail Search := By Business Process Type > 09/19/2024 🗐 89/22/2824 🛱 × GAIL BOLDEN … For all Bu By Business Process Type All) For Business Pr > := 0 Change Emergency Contacts > Start On My Behalf Create Idea > × Create Expense Report := Expense Report Even > Search > Receipt ← Expense Report Event > Receipt Adjustment Attachments ~ Spend Authorization > Save for Later Cancel
 - 4. Click Submit > Click Submit again after the alert appears.

Mana	Manage Delegations Christine McBride 🚥						
Business Processes allowed for Delegation				<i>Note:.</i> The team member's supervisor must approve the delegation request before the delegate can act on			
A Errors and Alerts Found 🔻					the team member's hehelf		
New Delegation 1 item					the team member's benan.		
	"Begin Date	end Date θ9/22/2024	Colegate X GAIL BOLDEN ···	s ∷≣ (sart On My Behalf	You have submitted Up Next: Jessica Sample Approval by Manager Due Date 09/20/2024 View Details Detegration Rule	
Attachm Subr	nents Save for Later	Cancel			IMPORTA the delegat	NT! An alert appears to inform the team member that te will have access to all previous expense reports and ansactions.	



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HOW TO REVOKE DELEGATION ACCESS

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



2. Click the Minus Icon (-) > Submit

Manage Delegations Christine McBirde	a notification in Workday that delegation access has
Note begins inter Image: Comparison of the set	DEEN REVOKEG. Workday Delegated Tasks Update 1 hour(s) ago The following Delegation has been stopped to revoke Delegation Access to your Inbox tasks and notifications: Delegate: GAIL BOLDEN Begin Date: 09/19/2024 End Date: 09/22/2024 All Business Processes: No Specific Business Processes: Copense Report Event Retain Access to Delegated Tasks: Yes My Delegations

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

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

On behalf of: Christine MoBride		
Goodwill	Q Search	🖻 🌖
Delegation Dashboard		
Delegated Actions		٥
Category	Reports & Tasks	ŕ
Expenses	Create Spense Report	- 11
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	III 0004 Hindday Isa. An Angina tamanad. Byeterin Kateur: Yaa zyahen Mala barawalah bit na nazima na 12 kana anging be neut Hindday Sanaka Lipida and Adimyr of the Hondary Penabe Relations stating on Friday, Saptemeter 20, 2004 et 11:03 PAPOT (SAFT) runti Banardy, Represeber	

stine McBride	page indicates to the delegate that
xpense Report	they are acting on bobalf of another
ense Report Information	they are acting on behall of another
eport For * Employee: Christine McBride	team member.
ations * 📀 Create New Expense Report	
Copy Previous Expense Report	Control usage may be audied and/or rescribed at any time. You are the only person entitlet to use your circle. A The VSA card is to be used for travel or meals necessary for the operation of the business. Personal charges with a compart healt Card any person that compare the compart healt Card any person to compare and any personal design of the operation of the business. Personal etc. No are expected to complete and using your CARS (card as the form of detailed receipts, packing silps etc. to violate your charges. A to vio are expected to complete and using your CARS (card Receipts) and the terms of detailed receipts, packing silps etc. To vio are expected to complete and using your CARS (card Receipts) and the terms of the terms of the travel of the travel. B A forg or statism card block of the spectral memodality to the cell card company and to the Finance 9. Cardinatem travered the risk cards to memory the restrict spectral memory for sections the spectral memodality of the cell card company and to the Finance 9. Cardinatem travered there can be compared to the card card card pack to the cell card company and to the Finance 9. Cardinatem travered there can be compared to the card card pack to the cell card company and to the Finance 9. Cardinatem travered there can be carded to the travel.
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Cancel	

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