

## **Instructions for Delegating Business Purposes in Workday:**

1. Login to workday at <https://workday.lsu.edu> using your MyLSU login and password
2. Click on the cloud next to your name in the upper right hand corner
3. From the drop down menu, select Inbox
4. Click the button with the down arrow, it is located next to the Sort By button
5. Select My Delegations from the drop down menu
6. On the My Delegations page, click Manage Delegation at the bottom
7. Select the Begin Date as the current date and the end date as 08/31/2018.
8. Click the empty box under the heading Delegate.
9. In the search bar enter your business manager, Melissa Roper Fay, and hit enter
10. Click the box next to Melissa's name, it should now show their name under the heading of Delegate
11. Under the heading of Start on My Behalf, you are going to select multiple items but they have to be done one at a time.
  - a. Click the empty bar, select the option for By Business Process Type
  - b. Select Expense Report Event, then select Create Expense Report
  - c. It will populate the Start on My Behalf box
  - d. Click on the box again and select By Business Process Type
  - e. Select Receipt, then select Create Receipt
  - f. Repeat the process by selecting the following:
    - i. Select Requisition Event, then select Checkout
    - ii. Select Spend Authorization, then select Create Spend Authorization
  - g. When finished you should have 4 items in the Start on My Behalf box
12. Under the heading of Do Inbox Tasks on My Behalf, select For all Business Processes and then click the box for Retain Access to Delegated Tasks in Inbox
13. Click the Delegation Rule box and select Expense Approval Delegation Rule-Revised
14. Click Submit at the bottom of the page

Business Processes allowed for Delegation

New Delegation 1 item

*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
09 / 06 / 2017	08 / 31 / 2018	<b>Delegate *</b> X Melissa Roper Fay (00012537)  Use Default Alternate <input checked="" type="checkbox"/>  <b>Alternate Delegate *</b> Julie Ramezanzad Perkins (00011037)	X Create Spend Authorization X Checkout X Create Receipt X Create Expense Report	<input checked="" type="radio"/> For all Business Processes <input type="radio"/> For Business Process <input type="radio"/> None of the above  Retain Access to Delegated Tasks in Inbox <input checked="" type="checkbox"/>  Delegation Rule X Expense Approval Delegation Rule-Revised

Submit

Save for Later

Cancel