1. As a Cardholder you may wish to delegate the Expense Reporting business process to your pCard Approver, Office Manager, or other responsible individual. You may opt to retain access to new pCard charges in your Workday inbox along with the inbox of your Delegate. This choice is detailed in Step 12.

2. To begin, first go to your Workday Inbox by clicking on your picture and selecting Inbox.
Procurement: Cardholder Delegation Process

3. From your Inbox click on the outer-most down arrow.

4. And then Click My Delegations
Procurement: Cardholder Delegation Process

5. This will bring up the Delegations Page

6. Click on Manage Delegations
7. Workday will prompt you for the Begin and End Date for the Delegates service. The Begin date will typically be today’s date and the End Date may be any realistic date in the future, such as one year from today. Both dates are required and you may cancel the delegation at any time.

8. Enter the Delegates first and last name and press Enter.
Procurement: Cardholder Delegation Process

9. In the field labeled ‘Start on My Behalf’, type the phrase: Create Expense Report and then press enter.

10. Workday will display an orange alert with information about the delegation process.

When you delegate the creation of an item, you give the delegate access to all of your previously created items of that type.
11. In the panel labeled ‘Do Inbox Tasks On My behalf’ click the 2nd radio button ‘For Business Process’ and type the phrase: Expense Report Event. **In order for your Delegate to receive notification in their own Inbox, also type the phrase: Review Credit Card Transaction Event.**
**Procurement: Cardholder Delegation Process**

12. Now you have a choice to make. If you would like to retain access to your pCard charges when they post to the Inbox, click the check box. This option will allow **either you or** your Delegate to create the expense report. The charge will appear in your Inbox as well as the Inbox of your Delegate, until one person acts upon it.

If you only want your Delegate to create expense reports and do not wish to see the charges in your Inbox, leave the box unchecked.

13. Click the green Submit button on the bottom left. Workday will send the delegation request to your Supervisor for approval.
Procurement: Cardholder Delegation Process

Cardholders and Delegates

Your screens and processes may vary from those described here.