

QUESTIONS?

The screenshot shows the Slido Q&A interface for an event named "UBCOWW". The event dates are "Jan 25 - Feb 4, 2022" and the hashtag is "#ubcoww". The interface includes a navigation menu on the left with options for "Live interaction", "Switch event", and "Dark mode" (which is currently turned off). The main area features a "Q&A" tab and a "Polls" tab. A text input field is labeled "Ask the speaker" and contains the placeholder text "Type your question". Below the input field, there is a message that says "There are no questions asked yet. Ask the first one!" accompanied by an icon of two people with a question mark.

UBCOWW

Jan 25 - Feb 4, 2022

#ubcoww

Live interaction

Switch event

Dark mode

About Slido

Ask the speaker

Type your question

There are no questions asked yet.
Ask the first one!



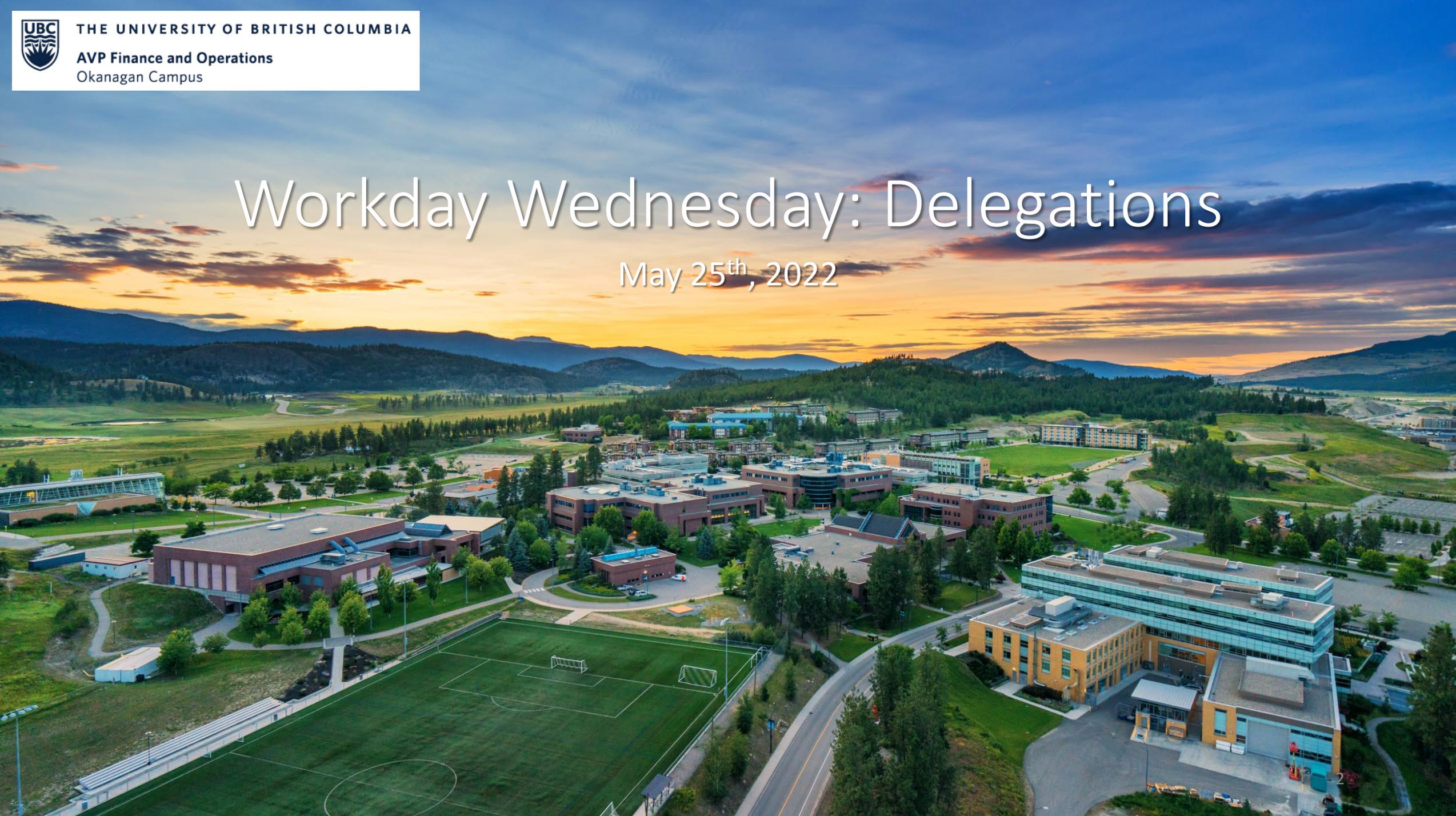
THE UNIVERSITY OF BRITISH COLUMBIA

AVP Finance and Operations

Okanagan Campus

Workday Wednesday: Delegations

May 25th, 2022



RESOURCES AVAILABLE

Setting Up Delegations Knowledge Base Article

- https://ubc.service-now.com/selfservice?id=kb_article&sys_id=79b5cd051b5f45909068c992604bcb7b&table=kb_knowledge

Delegate Expenses or Initiate as an Expense Delegate Knowledge Base Article

- https://ubc.service-now.com/selfservice?id=kb_article&sys_id=37420f541bd2c1105edd43b4bd4bcb5d&table=kb_knowledge

Inbox Delegation in Workday Knowledge Base Article

- https://ubc.service-now.com/selfservice?id=kb_article&sys_id=d97249d21be70dd045ad766f034bcb1d&table=kb_knowledge

Review an Expense Report Initiated by My Delegate

- https://ubc.service-now.com/selfservice?id=kb_article&sys_id=918ef4f11b6e45900dbaec21b24bcb16&table=kb_knowledge

AGENDA

- 1 | Common Questions and Issues
- 2 | Setting Up Delegations – Faculty Members, Managers, and Student Employees
- 3 | Delegations Demo
- 4 | Q+A





COMMON QUESTIONS AND ISSUES

COMMON QUESTIONS AND ISSUES

The *Alternate Delegate* is necessary in order to route items when the delegate is part of a transaction in which the approver is potentially approving a sensitive item for themselves (e.g. a compensation change). This is automatically set to the delegate's manager. If the *Alternate Delegate* should be a different person, please change the assignment.

Please note that this *Alternate Delegate* will only have transactions routed to them in special situations, they will not be able to start any processes on your behalf.

If more than one delegate is required to start a process on your behalf - this can be set up by adding multiple individuals in the Delegate field.

> Business Processes allowed for Delegation

New Delegation 1 item

| | *Begin Date | End Date | *Delegate | Start On My Behalf | Do Inbox Tasks On My Behalf |
|--|-------------|------------|---|----------------------|--|
| | 2022-05-24 | YYYY-MM-DD | <p>Delegate *</p> <input type="text" value="Search"/> | <input type="text"/> | <p><input type="radio"/> For all Business Processes</p> <p><input checked="" type="radio"/> For Business Process</p> <input type="text" value="Search"/> |

Use Default Alternate

Alternate Delegate *

Retain Access to Delegated Tasks in Inbox

Delegation Rule

enter your comment

Attachments

Submit Save for Later Cancel

= **INITIATE** on my behalf

= **APPROVE** on my behalf

Note: approval inbox items are typically coming from the delegator's direct reports. E.g. approving a direct report's absence

Examples:

- ✓ **Request** Absence on my behalf
- ✓ **Create** Expense Report on my behalf
- ✓ **Initiate** Hires on my behalf

Examples:

- ✓ **Approve** Absence on my behalf
- ✓ **Approve** Expense Report on my behalf
- ✓ **Approve** Hires on my behalf

COMMON QUESTIONS AND ISSUES

Click here

How do I know which business processes I can delegate? How do I know whether they'd be 'Start on My Behalf' or 'Do Inbox Tasks on My Behalf'?

> Business Processes allowed for Delegation

New Delegation 1 item

| | *Begin Date | End Date | *Delegate | Start On My Behalf | Do Inbox Tasks On My Behalf |
|--------------------------|-------------|------------|---|----------------------|--|
| <input type="checkbox"/> | 2022-05-24 | YYYY-MM-DD | <p>Delegate *</p> <input type="text" value="Search"/> | <input type="text"/> | <p><input type="radio"/> For all Business Processes</p> <p><input checked="" type="radio"/> For Business Process</p> <input type="text" value="Search"/> |

Use Default Alternate

Alternate Delegate *

Retain Access to Delegated Tasks in Inbox

Delegation Rule

enter your comment

Attachments

COMMON QUESTIONS AND ISSUES

Business Processes allowed for Delegation

This column categorizes the BP/also is the name for the 'Do Inbox Task on My Behalf' task

This column indicates that the task can be delegated for **APPROVALS** ('Do Inbox Task on My Behalf')

This column indicates whether the task can be delegated as an initiation task ('Start On My Behalf')

251 items

| Business Process Type | Inbox Actions | Start Business Processes |
|---------------------------------------|-------------------------------------|--------------------------|
| Expense Report Event | <input checked="" type="checkbox"/> | Create Expense Report |
| Freeze Job Requisition | <input checked="" type="checkbox"/> | |
| Freeze Position | <input checked="" type="checkbox"/> | |
| Funding Source Reclassification Event | <input checked="" type="checkbox"/> | |
| Gift Event | <input checked="" type="checkbox"/> | |
| Hire | <input checked="" type="checkbox"/> | Hire Employee |
| Hiring Restrictions | <input checked="" type="checkbox"/> | |
| Initiate Compensation Review Process | <input checked="" type="checkbox"/> | |
| Integration Process Event | <input checked="" type="checkbox"/> | |
| Internal Service Delivery Event | <input checked="" type="checkbox"/> | |



COMMON QUESTIONS AND ISSUES

**In this example, what would Anita be starting on my behalf?
What would she be approving?**

New Delegation 1 item

| | *Begin Date | End Date | *Delegate | Start On My Behalf | Do Inbox Tasks On My Behalf |
|--|-------------|------------|--|--|---|
| | 2022-05-24 | YYYY-MM-DD | <p>Delegate *</p> <p>× Anita Friesen ... </p> <p>Use Default Alternate <input checked="" type="checkbox"/></p> <p>Alternate Delegate *</p> <p>Fiona Stirling</p> | <p>× Hire Employee </p> <p>× Create Expense Report</p> | <p><input type="radio"/> For all Business Processes</p> <p><input checked="" type="radio"/> For Business Process</p> <p>× Internal Service Delivery Event </p> <p><input type="radio"/> None of the above</p> <p>Retain Access to Delegated Tasks in Inbox <input type="checkbox"/></p> <p>Delegation Rule <input type="text"/></p> |

COMMON QUESTIONS AND ISSUES

In this example, what would Anita be starting on my behalf? What would she be approving?

Anita would be able to initiate a hire and create an expense report on my behalf

Anita would be able to approve ISD events on my behalf

New Delegation 1 item

| | *Begin Date | End Date | *Delegate | Start On My Behalf | Do Inbox Tasks On My Behalf |
|--|-------------|------------|--|--|---|
| | 2022-05-24 | YYYY-MM-DD | <p>Delegate *</p> <p>× Anita Friesen ... </p> <p>Use Default Alternate <input checked="" type="checkbox"/></p> <p>Alternate Delegate *</p> <p>Fiona Stirling</p> | <p>× Hire Employee </p> <p>× Create Expense Report</p> | <p><input type="radio"/> For all Business Processes</p> <p><input checked="" type="radio"/> For Business Process</p> <p>× Internal Service Delivery Event </p> <p><input type="radio"/> None of the above</p> <p>Retain Access to Delegated Tasks in Inbox <input type="checkbox"/></p> <p>Delegation Rule <input type="text"/></p> |

COMMON QUESTIONS AND ISSUES

Another way to find business processes allowed for delegation (initiation) is to click 'By Business Process Type' here

View Delegation 1 item

| | *Begin Date | End Date | *Delegate | Start On My Behalf |
|--|-------------|------------|-----------------------------|--|
| | 2022-05-24 | YYYY-MM-DD | Delegate * Anita Friesen | <div><p>Search </p><p>By Business Process Type </p><p>All </p></div> |

New Delegation 1 item

| | *Begin Date | End Date | *Delegate | Start On My Behalf | Do In |
|--|-------------|------------|-----------------------------|--|-------|
| | 2022-05-24 | YYYY-MM-DD | Delegate * Anita Friesen | <div><p>Search </p><p>← By Business Process Type</p><ul style="list-style-type: none">Absence Calendar Change Job Create Position Expense Report Event Hire Payment Election Enrollment Event Personal Information Change Receipt Requisition Event Spend Authorization Termination </div> | |

enter your comment



COMMON QUESTIONS AND ISSUES

I've delegated my expense reports to my delegate, but they tell me they can't create an expense report on my behalf. Why is this happening?

| *Delegate | Start On My Behalf | Do Inbox Tasks On My Behalf |
|--|----------------------|--|
| <p>Delegate *</p> <p>× Anita Friesen ...</p> <p>Use Default Alternate</p> <p><input checked="" type="checkbox"/></p> <p>Alternate Delegate *</p> <p>Fiona Stirling</p> | <p>[Empty field]</p> | <p><input type="radio"/> For all Business Processes</p> <p><input checked="" type="radio"/> For Business Process</p> <p>× Expense Report Event ...</p> <p><input type="radio"/> None of the above</p> <p>Retain Access to Delegated Tasks in Inbox</p> <p><input type="checkbox"/></p> <p>Delegation Rule</p> <p>[Empty field]</p> |



COMMON QUESTIONS AND ISSUES

I've delegated my expense reports to my delegate, but they tell me they can't create an expense report on my behalf. Why is this happening?

In this example, we can see the 'Start On My Behalf' column is empty

But, the 'Do Inbox Tasks On my Behalf' column has Expense Report Event listed.

This scenario means the delegate can approve any expense reports the delegator receives to their inbox, but they cannot initiate the creation of an expense report on the delegator's behalf.

The screenshot shows a configuration interface for delegation. It is divided into three main sections:

- *Delegate:** Contains a 'Delegate' dropdown menu with 'Anita Friesen' selected, a 'Use Default Alternate' checkbox which is checked, and an 'Alternate Delegate' dropdown menu with 'Fiona Stirling' selected.
- Start On My Behalf:** An empty dropdown menu.
- Do Inbox Tasks On My Behalf:** Contains radio button options: 'For all Business Processes' (unselected), 'For Business Process' (selected), and 'None of the above' (unselected). Under 'For Business Process', there is a dropdown menu with 'Expense Report Event' selected. Below this is a checkbox for 'Retain Access to Delegated Tasks in Inbox' which is unchecked. At the bottom is a 'Delegation Rule' dropdown menu.

COMMON QUESTIONS AND ISSUES

To resolve this, we would put **Create Expense Report** in the 'Start On My Behalf' column

We'd switch the 'Do Inbox Tasks On My Behalf' column to **None of the Above** (assuming there are no approvals needing to be delegated)

| *Delegate | Start On My Behalf | Do Inbox Tasks On My Behalf |
|--|--------------------------------|---|
| <p>Delegate *</p> <p>× Anita Friesen ...</p> <p>Use Default Alternate</p> <p><input checked="" type="checkbox"/></p> <p>Alternate Delegate *</p> <p>Fiona Stirling</p> | <p>× Create Expense Report</p> | <p><input type="radio"/> For all Business Processes</p> <p><input type="radio"/> For Business Process</p> <p><input type="text"/></p> <p><input checked="" type="radio"/> None of the above</p> <p>Retain Access to Delegated Tasks in Inbox</p> <p><input type="checkbox"/></p> <p>Delegation Rule</p> <p><input type="text"/></p> |

COMMON QUESTIONS AND ISSUES

I've delegated the creation of expense reports, but I'm unable to approve as the delegator. Why is this happening?

This option is only available when the delegator has set up approval delegations in the 'Do Inbox Tasks on My Behalf' column. If this column is empty, there's no need to worry about this scenario.

| *Delegate | Start On My Behalf | Do Inbox Tasks On My Behalf |
|--|--------------------------------|--|
| <p>Delegate *</p> <p>× Anita Friesen ...</p> <p>Use Default Alternate</p> <p><input checked="" type="checkbox"/></p> <p>Alternate Delegate *</p> <p>Fiona Stirling</p> | <p>× Create Expense Report</p> | <p><input checked="" type="radio"/> For all Business Processes</p> <p><input checked="" type="radio"/> For Business Process</p> <p>× Expense Report Event</p> <p><input type="radio"/> None of the above</p> <p>Retain Access to Delegated Tasks in Inbox</p> <p><input type="checkbox"/></p> <p>Delegation Rule</p> <p></p> |

This scenario is happening because the 'Retain Access to Delegated Tasks in Inbox' box is not checked

COMMON QUESTIONS AND ISSUES

I've delegated the creation of expense reports, but I'm unable to approve as the delegator. Why is this happening?

| *Delegate | Start On My Behalf | Do Inbox Tasks On My Behalf |
|--|--------------------------------|---|
| <p>Delegate *</p> <p>× Anita Friesen ...</p> <p>Use Default Alternate</p> <p><input checked="" type="checkbox"/></p> <p>Alternate Delegate *</p> <p>Fiona Stirling</p> | <p>× Create Expense Report</p> | <p><input checked="" type="radio"/> For all Business Processes</p> <p><input checked="" type="radio"/> For Business Process</p> <p>× Expense Report Event</p> <p><input type="radio"/> None of the above</p> <p>Retain Access to Delegated Tasks in Inbox</p> <p><input checked="" type="checkbox"/></p> <p>Delegation Rule</p> <p></p> |

To resolve this, if the delegator is delegating approvals, please ensure this box is checked. This will enable the delegator to access delegated tasks in their inbox which may require their approval!

A dark blue outline icon of a laptop computer, showing the screen, keyboard area, and base.

SETTING UP DELEGATIONS

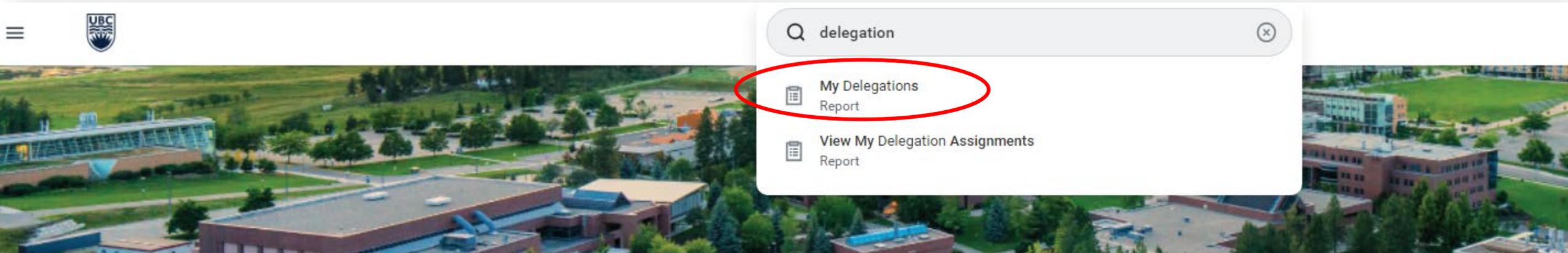
**+ COMMON DELEGATION SCENARIOS FOR FACULTY MEMBERS,
MANAGERS, AND STUDENT EMPLOYEES**



SETTING UP DELEGATIONS

1

Navigate to 'My Delegations' from the Workday search bar



Good Afternoon, Lauren Hatchard

It's Tuesday, May 24, 2022

Awaiting Your Action

You're all caught up on your inbox items.

[View All Apps](#)

SETTING UP DELEGATIONS

2

Click 'Manage Delegations'

My Delegations

For [Lauren Hatchard](#)

Current Delegations

Current Task Delegations

Delegation History

Delegated Tasks

Business Processes allowed for Delegation

0 items

| Begin Date | End Date | Delegate |
|---|----------|----------|
|  <p>No items available.</p> | | |

Manage Delegations

SETTING UP DELEGATIONS

3

Set start date for delegations to become effective. End date is optional, but recommended if you are delegating approvals.

> Business Processes allowed for Delegation

New Delegation 1 item

| + | *Begin Date | End Date | *Delegate | Start On My Behalf | Do Inbox Tasks On My Behalf |
|---|----------------------|----------------------|--|----------------------|--|
| ○ | <input type="text"/> | <input type="text"/> | Delegate * <input type="text"/> Use Default Alternate <input checked="" type="checkbox"/> Alternate Delegate * | <input type="text"/> | <input type="radio"/> For all Business Processes <input type="radio"/> For Business Process <input type="text"/> <input checked="" type="radio"/> None of the above Retain Access to Delegated Tasks in Inbox <input type="checkbox"/> Delegation Rule |

 enter your comment



SETTING UP DELEGATIONS

4

Enter your delegate's name.

> Business Processes allowed for Delegation

New Delegation 1 item

| | *Begin Date | End Date | *Delegate | Start On My Behalf | Do Inbox Tasks On My Behalf |
|--------------------------|-------------|------------|---|----------------------|--|
| <input type="checkbox"/> | 2022-05-24 | 2022-06-08 | Delegate * <input type="text" value="Anita Friesen"/> Use Default Alternate <input checked="" type="checkbox"/> Alternate Delegate * Fiona Stirling | <input type="text"/> | <input type="radio"/> For all Business Processes <input type="radio"/> For Business Process <input type="text" value=""/> <input checked="" type="radio"/> None of the above Retain Access to Delegated Tasks in Inbox <input type="checkbox"/> Delegation Rule |

enter your comment



SETTING UP DELEGATIONS

5

Add tasks your delegate will be initiating and/or approving on your behalf.

> Business Processes allowed for Delegation

New Delegation 1 item

| | *Begin Date | End Date | *Delegate | Start On My Behalf | Do Inbox Tasks On My Behalf |
|--|-------------|------------|--|---|--|
| | 2022-05-24 | 2022-06-08 | Delegate * Anita Friesen Use Default Alternate <input checked="" type="checkbox"/> Alternate Delegate * Fiona Stirling | <input type="checkbox"/> Hire Employee <input type="checkbox"/> Create Receipt <input type="checkbox"/> Mobile Create Receipt | <input type="radio"/> For all Business Processes <input checked="" type="radio"/> For Business Process Request Time Off <input type="radio"/> None of the above <input checked="" type="checkbox"/> Retain Access to Delegated Tasks in Inbox Delegation Rule |

If you are delegating any approvals, ensure this box is checked.

enter your comment

Submit Save for Later Cancel

SETTING UP DELEGATIONS

6

Click Submit

> Business Processes allowed for Delegation

New Delegation 1 item

| | *Begin Date | End Date | *Delegate | Start On My Behalf | Do Inbox Tasks On My Behalf |
|--------------------------|-------------|------------|--|---|--|
| <input type="checkbox"/> | 2022-05-24 | YYYY-MM-DD | Delegate <input type="text" value="Anita Friesen"/> | <input type="checkbox"/> Hire Employee <input type="checkbox"/> Create Receipt <input type="checkbox"/> Mobile Create Receipt | <input type="radio"/> For all Business Processes <input checked="" type="radio"/> For Business Process <input type="text" value="Request Time Off"/> <input type="radio"/> None of the above Retain Access to Delegated Tasks in Inbox <input checked="" type="checkbox"/> Delegation Rule <input type="text"/> |

enter your comment

Submit

Save for Later

Cancel

SETTING UP DELEGATIONS: FACULTY MEMBER/MANAGER

Approvals should typically only be delegated in the case of a period of absence (e.g. vacation) to avoid business processes being held up.

The screenshot shows a user interface for setting up delegations. It is divided into two main sections:

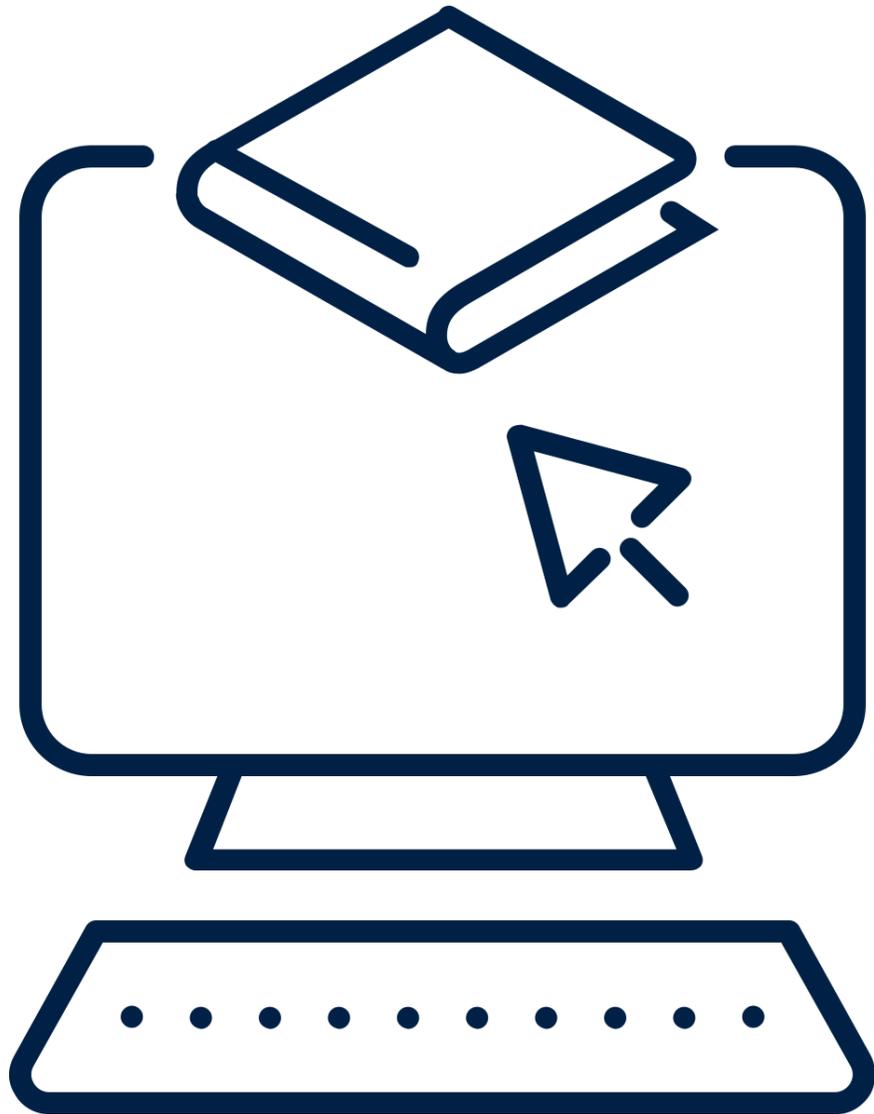
- Start On My Behalf:** A list of tasks that can be delegated, each with an 'X' icon to remove it and a menu icon to the right. The tasks are:
 - × Create Receipt
 - × Mobile Create Receipt
 - × Create Expense Report
 - × Checkout
- Do Inbox Tasks On My Behalf:** A section with radio button options and a dropdown menu.
 - For all Business Processes
 - For Business Process
 - (Dropdown menu)
 - None of the above

Will the faculty member/manager need to have expense reports approved during their absence? Hires? Consult with these delegators before they leave the office to determine which approvals should be delegated.

SETTING UP DELEGATIONS: STUDENT EMPLOYEE

| Start On My Behalf | Do Inbox Tasks On My Behalf |
|--|--|
| <input type="text" value="x Create Expense Report"/> | <input type="radio"/> For all Business Processes <input type="radio"/> For Business Process <input type="text"/> <input checked="" type="radio"/> None of the above |

Some departments may decide to have their student employees delegate the creation of expense reports. This would be a simple **'Start On My Behalf'** delegation of the Create Expense Report BP.



DELEGATIONS DEMO