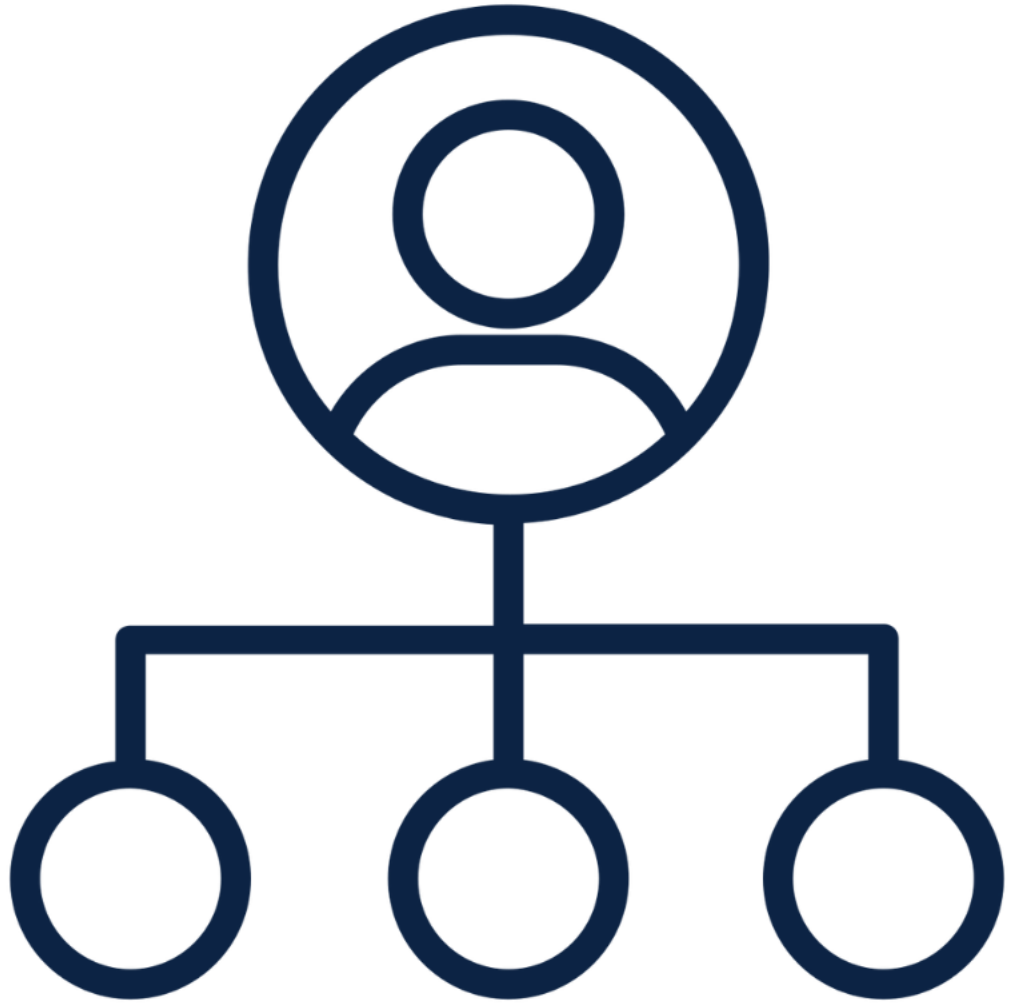
THE UNIVERSITY OF BRITISH COLUMBIA

AVP Finance and Operations
Okanagan Campus

WORKDAY WEDNESDAY: DELEGATIONS



JUNE 14, 2023

AGENDA

1. Delegations in Workday
2. Assigning Delegations – Faculty Members, Managers, and Student Employees
3. Questions and Examples
4. Delegations Demo
5. Resources

DELEGATIONS IN WORKDAY

Delegation allows another employee to initiate and approve tasks on your behalf. <u>This does not remove accountability to the original employee</u>.
Do not delegate your entire inbox as it may contain personal information of employees – delegation should be used when you are unavailable to complete time sensitive tasks.
Delegation of inbox approvals should be to a person that is a peer or supervisor who likely already has access to the same information you do.

HR (tasks) delegations may be selected based on Staff, Student or Faculty (different delegate for each group).
Finance (tasks) delegation is delegated based on task and not specific to type of employee.

Delegation does not transfer a person's security permissions to the appointed delegate, only security related to performing the delegated tasks.

DELEGATIONS IN WORKDAY

Types of Delegation:

1. **Start on my Behalf:** allows delegate to "initiate" on your behalf
   - Delegate does not have view access to see where the task is in the business process so they can run the process "how do I see BPs awaiting action" process.
   - Can have multiple delegates to start transactions on your behalf.

This is the "Creating or doing" delegation

2. **Inbox Tasks and Approvals:** allows delegate to approve on your behalf

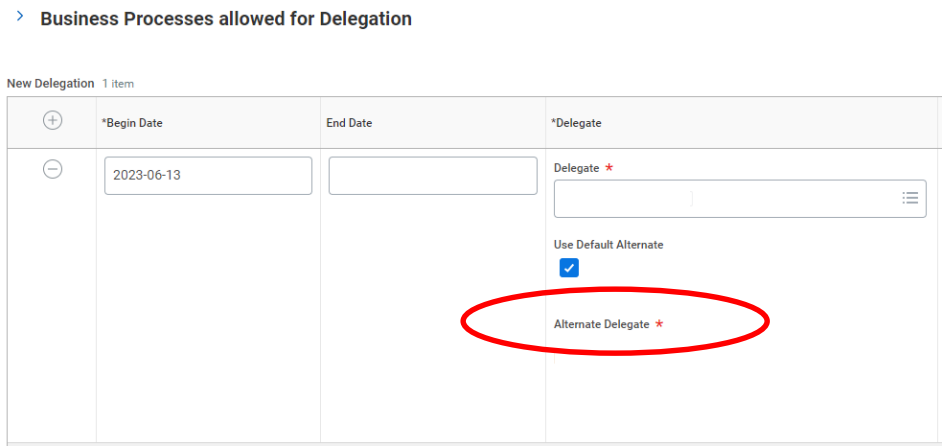
This is the "Approving" delegation

ALTERNATE DELEGATION

An alternate delegate is necessary to ensure that the delegate is not approving a sensitive item for themselves. This is automatically set to the delegate's manger but can be changed if needed.

The Alternate delegate will only have transactions routed to them in special circumstances – they will not be able to initiate processes on your behalf.

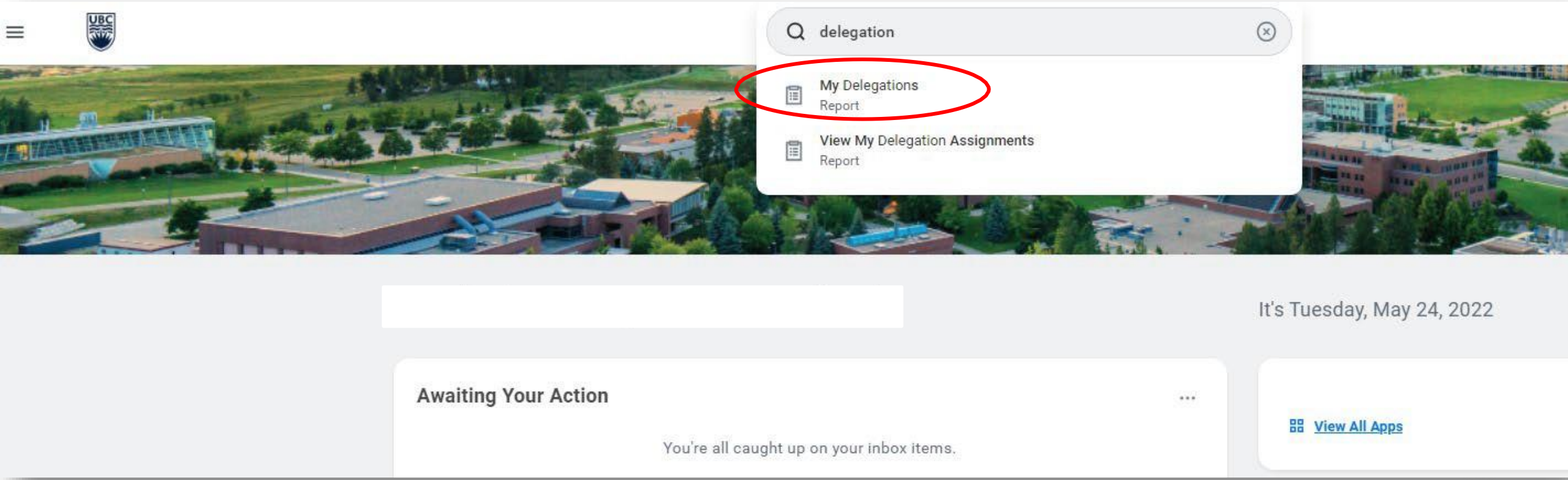
If you want more than one person to start a process on your behalf, add multiple individuals to the Delegate field.



ASSIGNING DELEGATIONS

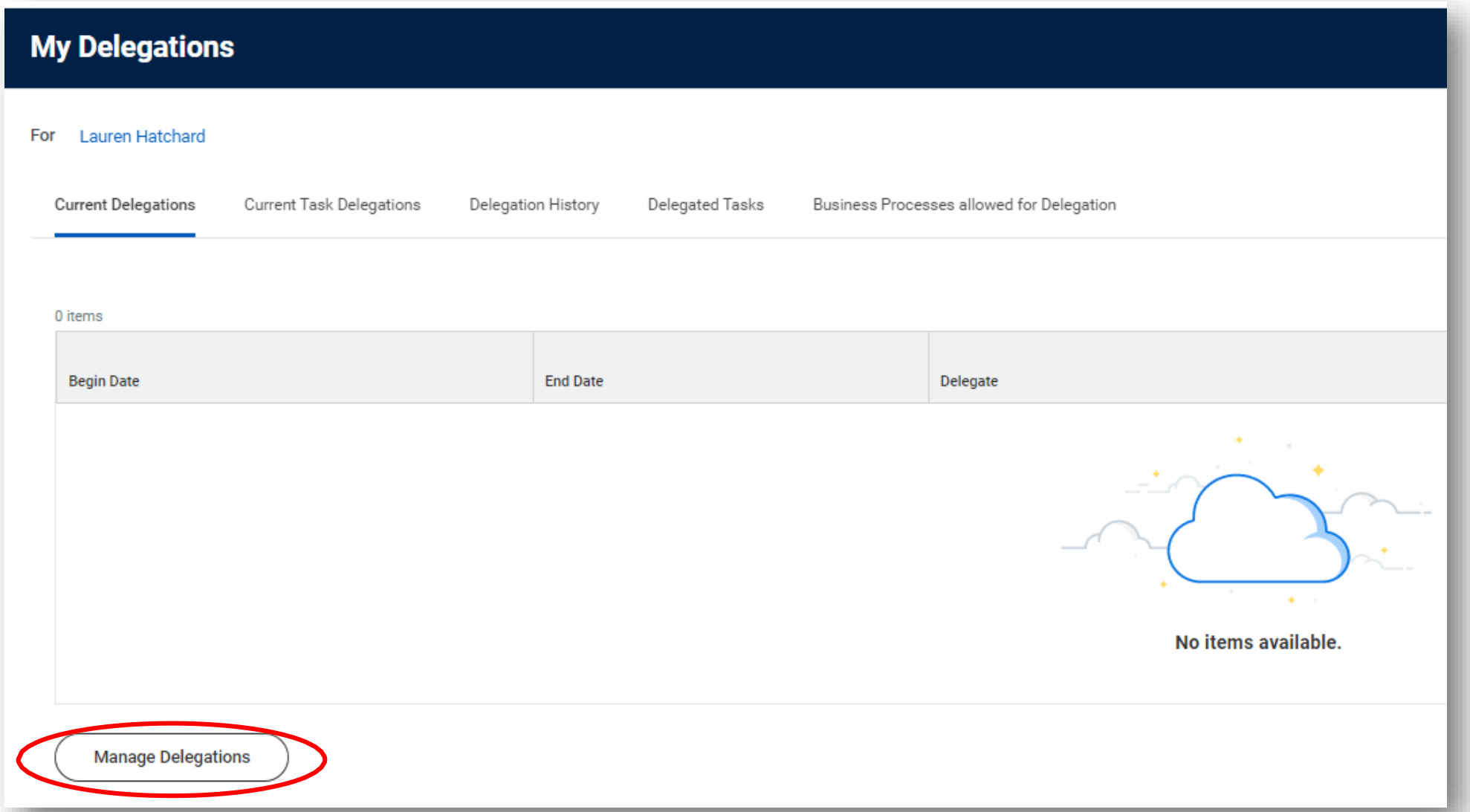
ASSIGNING DELEGATIONS

1 Navigate to **‘My Delegations’** from the Workday search bar



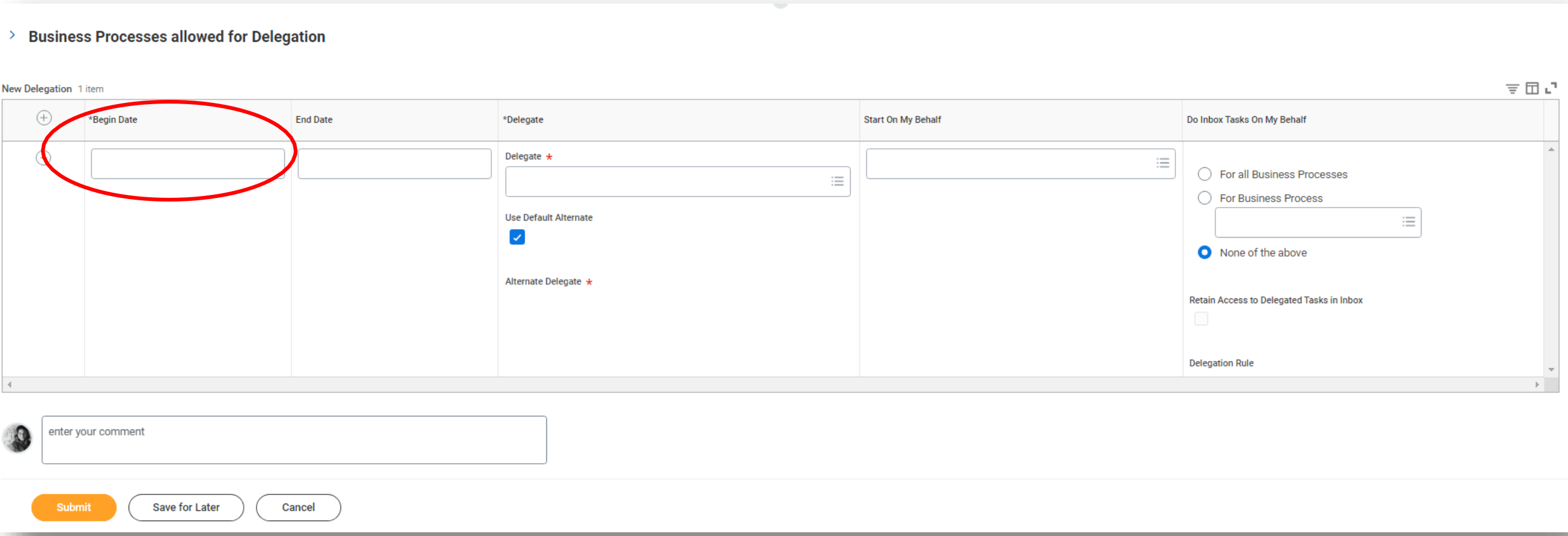
ASSIGNING DELEGATIONS

2 Click **‘Manage Delegations’**



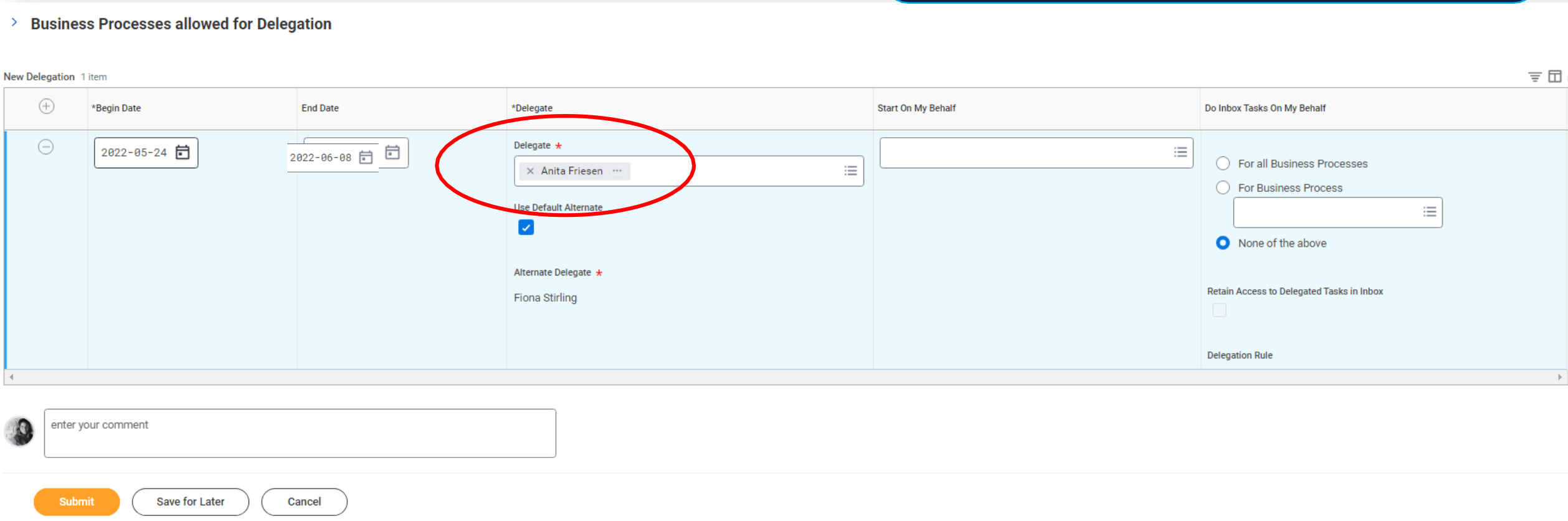
ASSIGNING DELEGATIONS

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



ASSIGNING DELEGATIONS

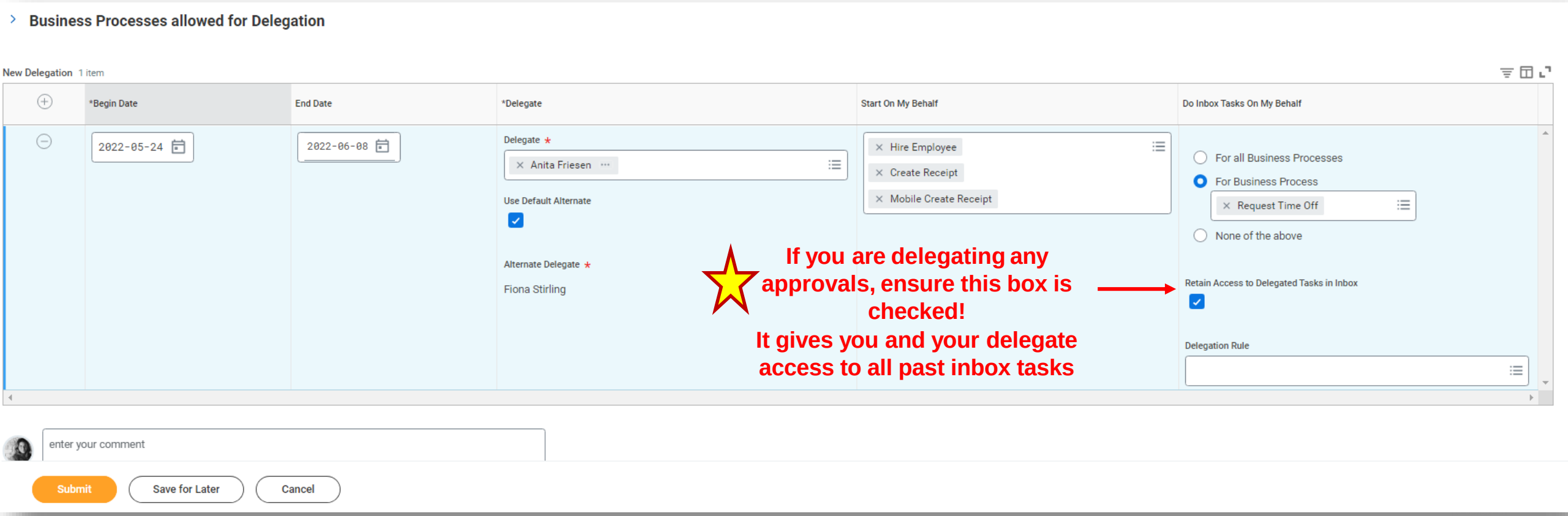
4 Enter your delegate's name.



ASSIGNING DELEGATIONS

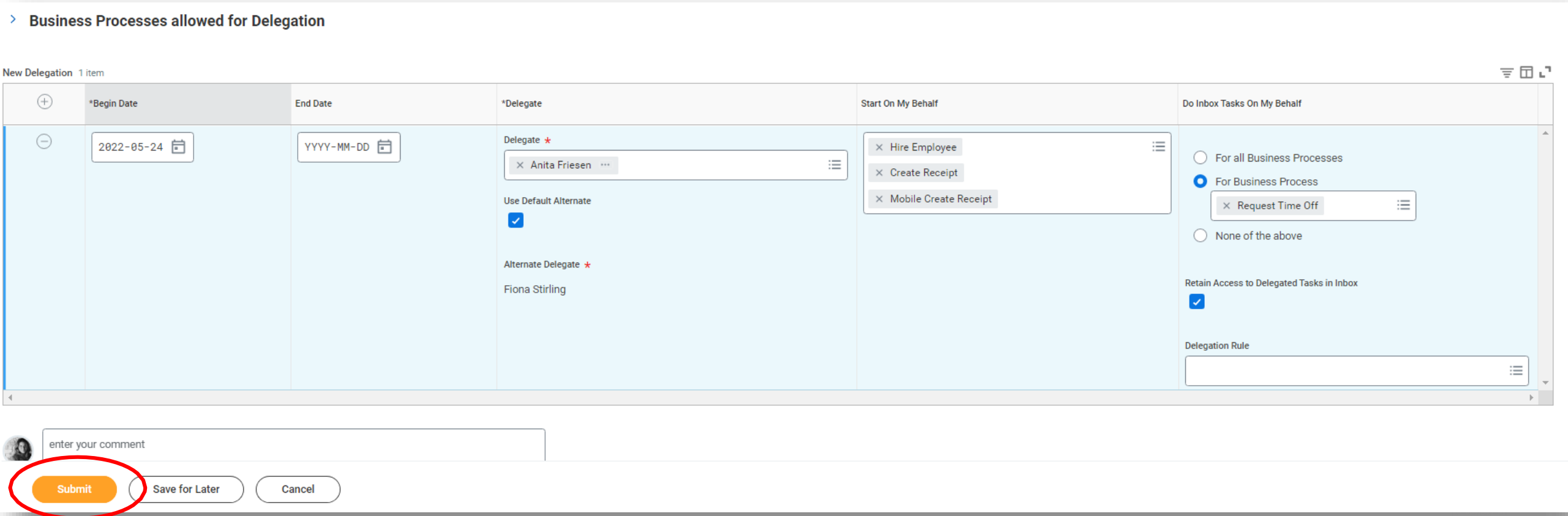
5

Add tasks your delegate will be initiating, “Start on my behalf,” and/or approving, “Do inbox tasks on my behalf” on your behalf.



ASSIGNING DELEGATIONS

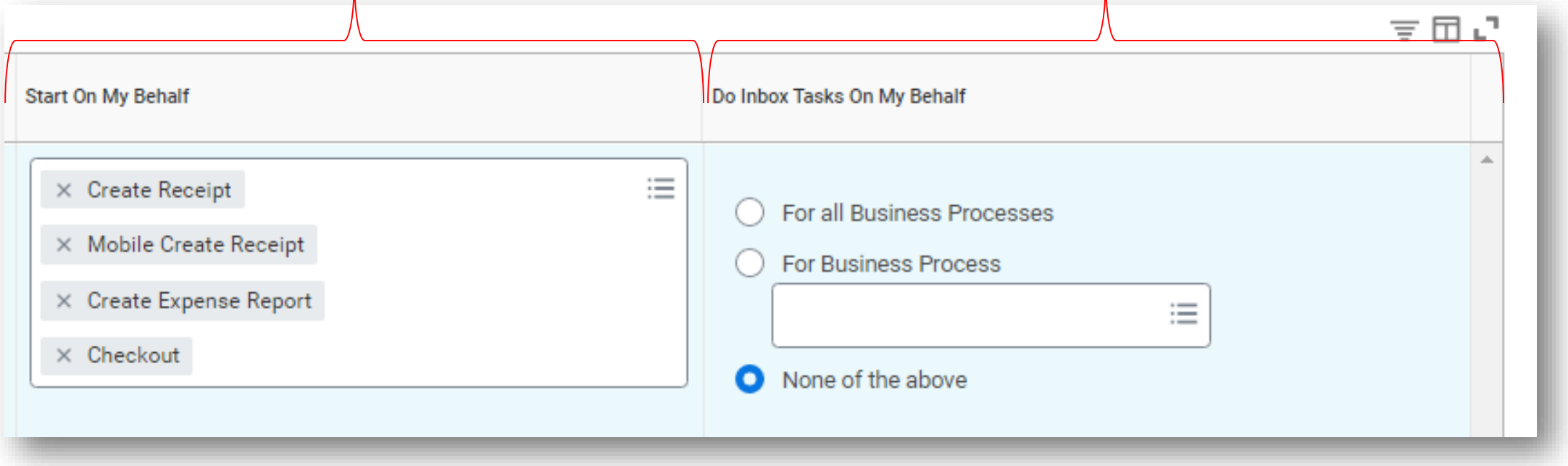
6 Click Submit



ASSIGNING DELEGATIONS: FOR FACULTY MEMBER/MANAGER

To **Initiate** tasks on your behalf

To **Approve** tasks on your behalf



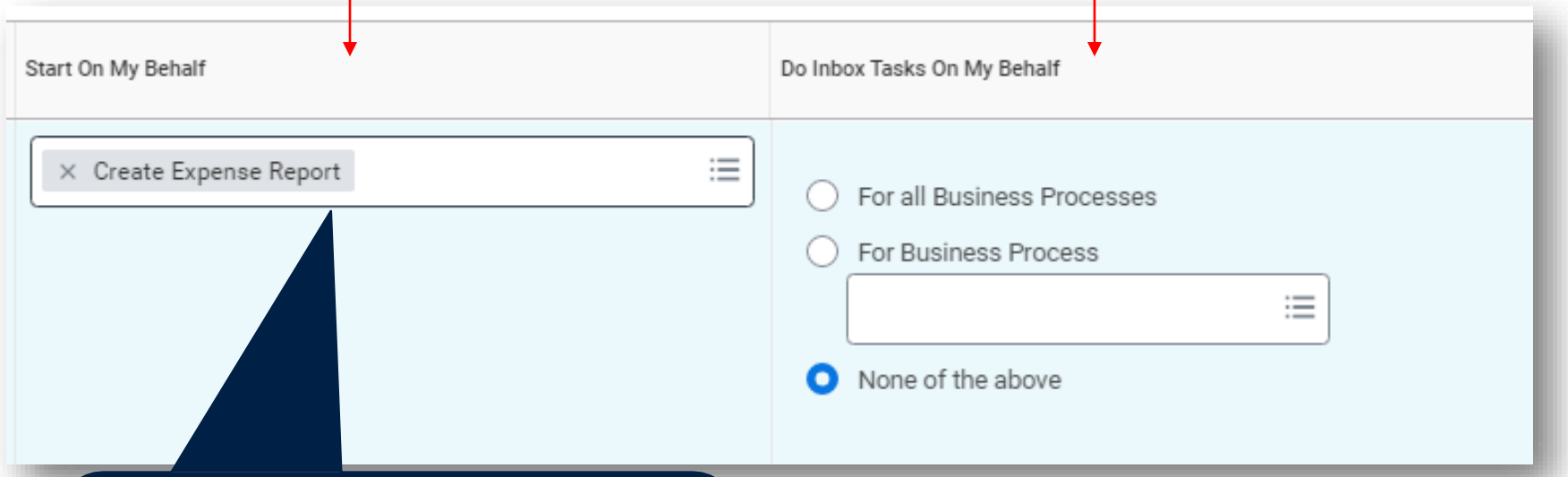
Approvals should typically only be delegated in the case of a period of absence (e.g. vacation) to avoid business processes being held up.

Do NOT delegate Approvals to student employees

ASSIGNING DELEGATIONS: FOR STUDENT EMPLOYEE

TO DO ON YOUR BEHALF

TO APPROVE ON YOUR BEHALF

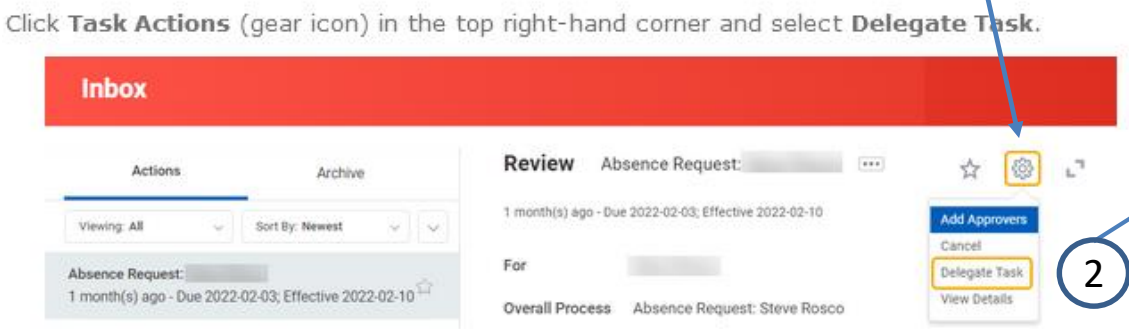


Some departments may decide to have their student employees delegate the creation/initiation of expense reports. This would be a simple **'Start On My Behalf'** delegation of the Create Expense Report BP.

AD-HOC INBOX DELEGATION

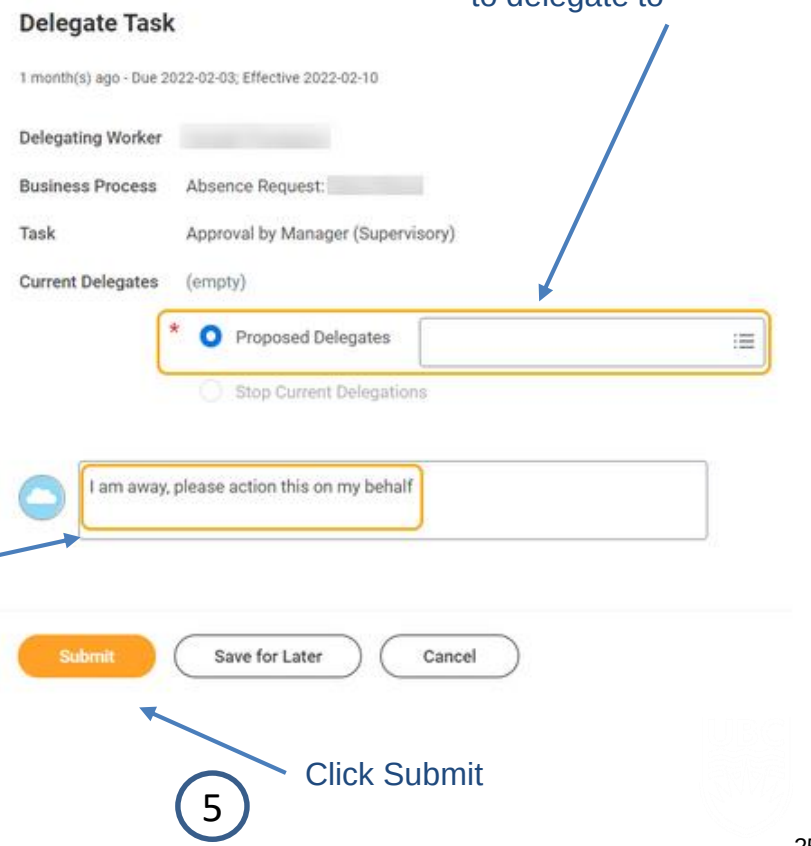
Individual inbox tasks can be delegated on an ad hoc basis. This is useful if you are unable to perform the actions yourself due to time off or a leave of absence.

1 From your inbox, open the item you wish to delegate => click task options icon



2 This will bring up the Delegate Task BP

3 Enter/search the name of the person you want to delegate to

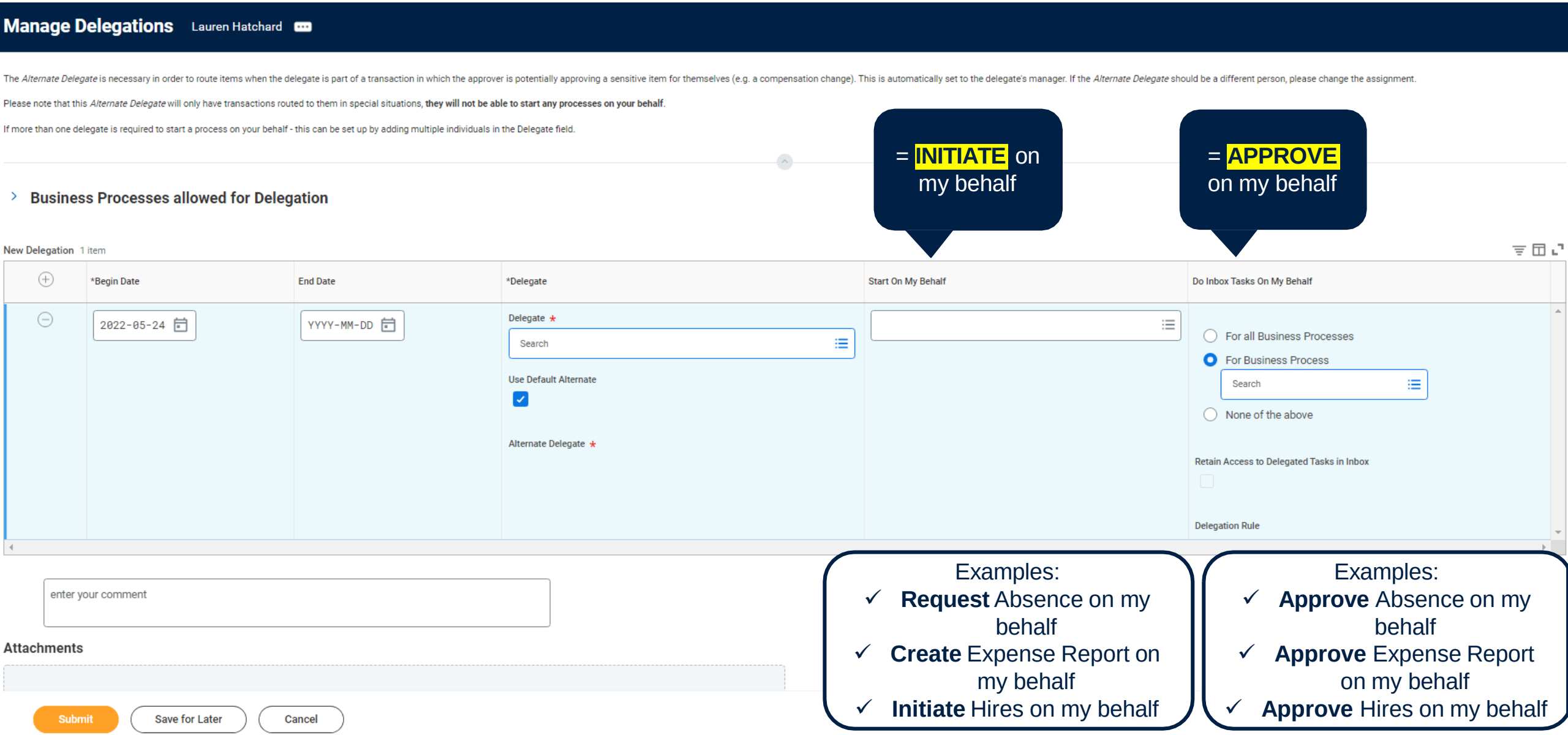


4 Optional: Enter the reason for the delegation and/or any information the delegate may need

5 Click Submit

QUESTIONS & EXAMPLES

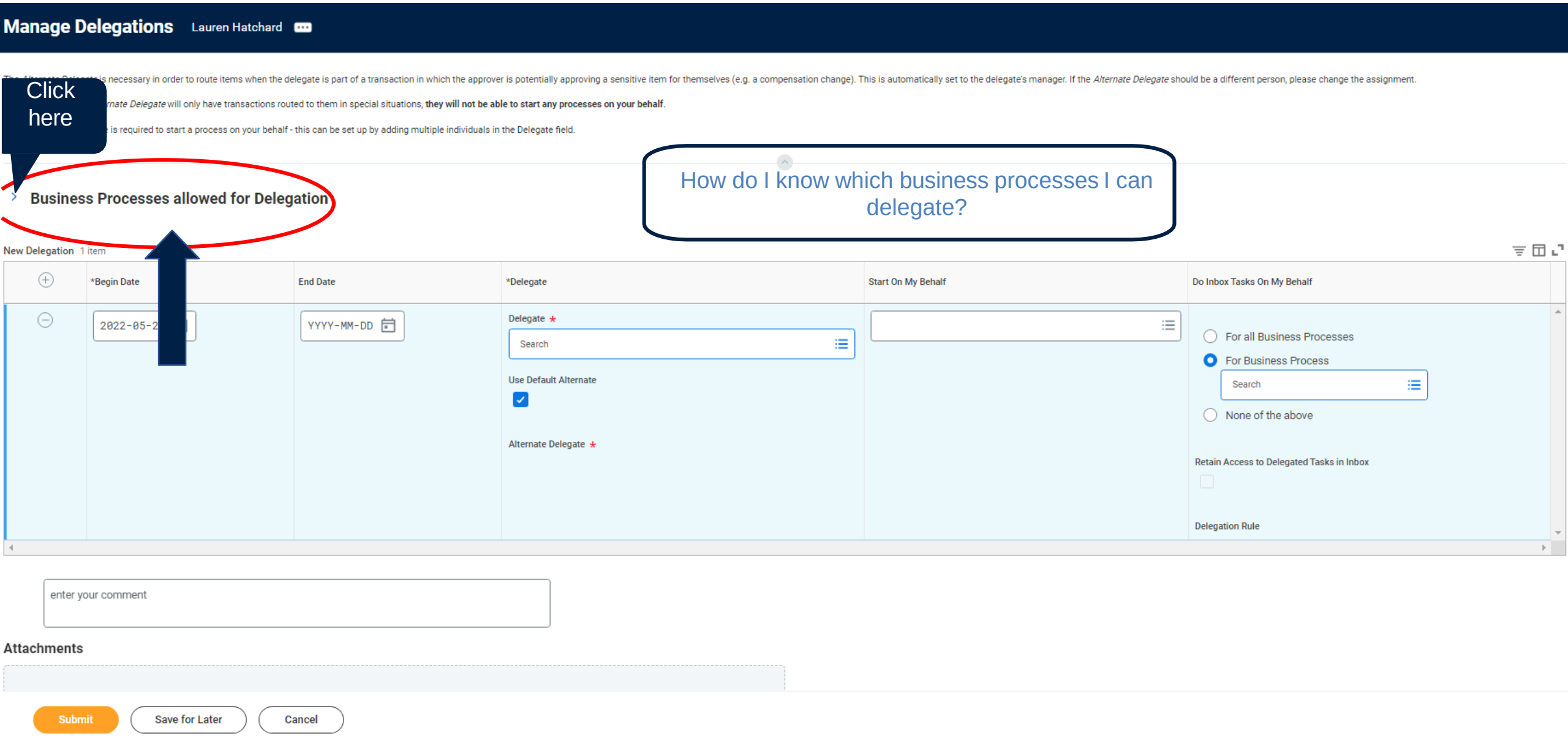
QUESTION: WHICH COLUMN DO I COMPLETE?



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

QUESTION – WHAT CAN BE DELEGATED?



QUESTIONS –WHAT CAN BE DELEGATED?

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’)**

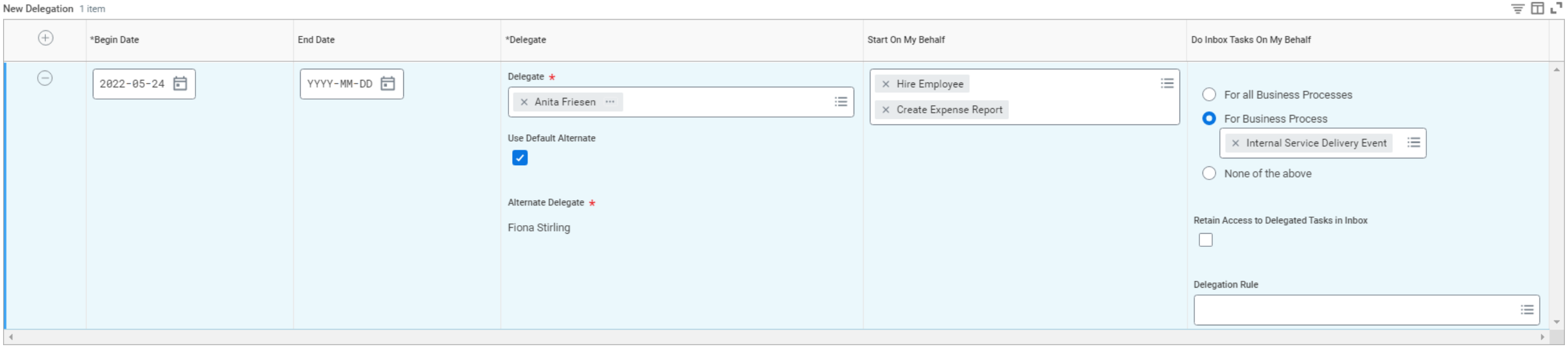
This column indicates whether the task can be delegated as an initiation task **(‘Start On My Behalf’)**

251 items

Business Process Type	Inbox Actions	Start Business Processes
Expense Report Event	✓	Create Expense Report
Freeze Job Requisition	✓	
Freeze Position	✓	
Funding Source Reclassification Event	✓	
Gift Event	✓	
Hire	✓	Hire Employee
Hiring Restrictions	✓	
Initiate Compensation Review Process	✓	
Integration Process Event	✓	
Internal Service Delivery Event	✓	

EXAMPLE

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

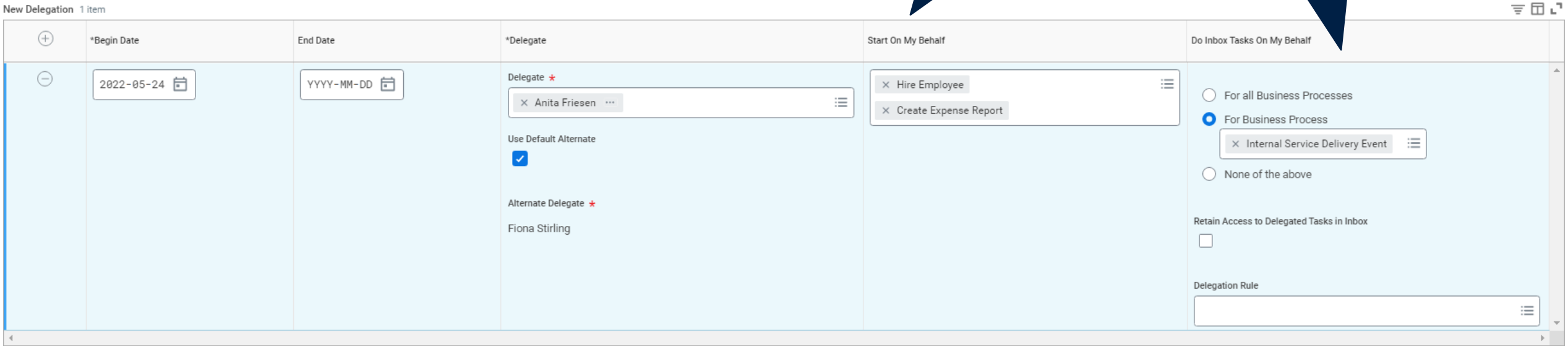


EXAMPLE

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

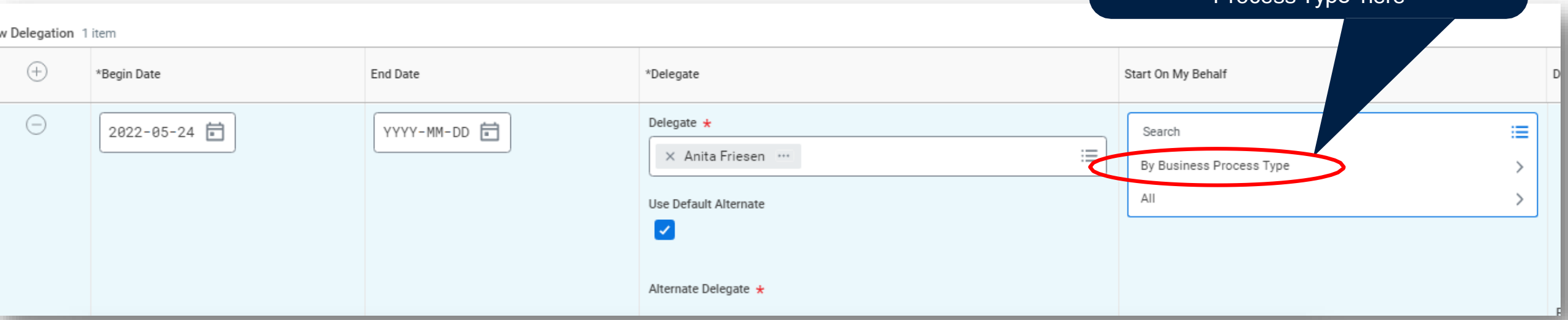
Anita would be able to initiate a hire and create an expense report on my behalf

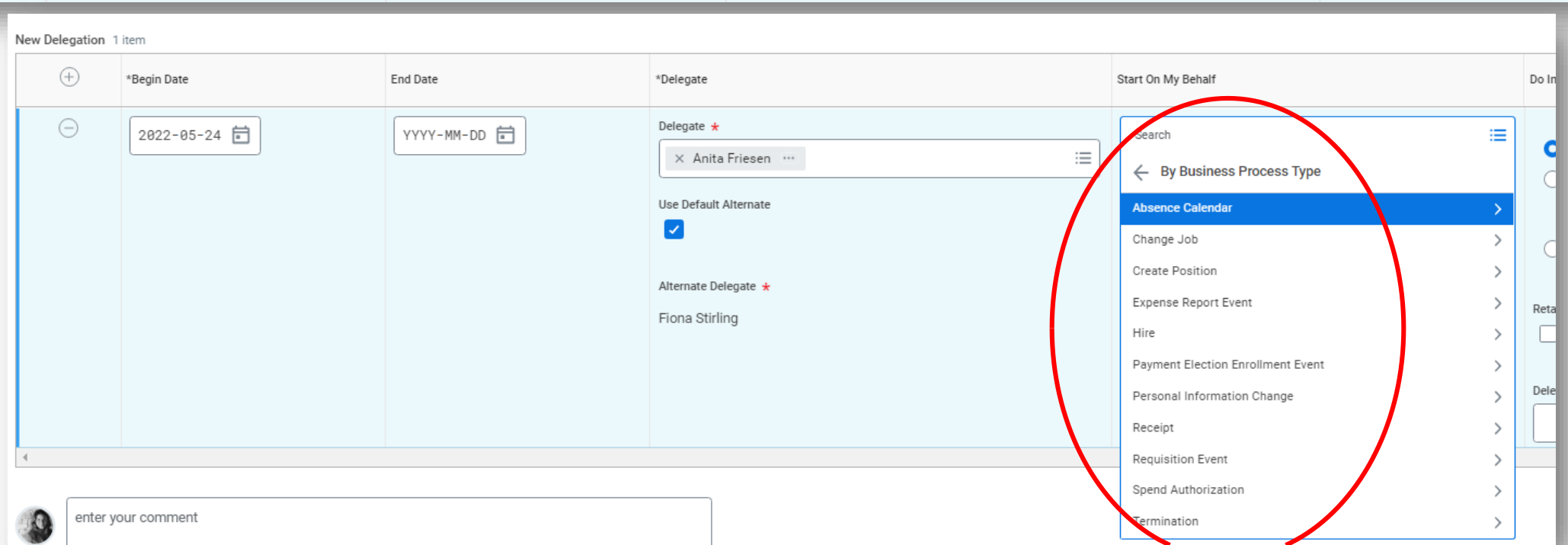
Anita would be able to approve ISD events on my behalf



WHAT CAN BE DELEGATED BY BUSINESS PROCESS TYPE?

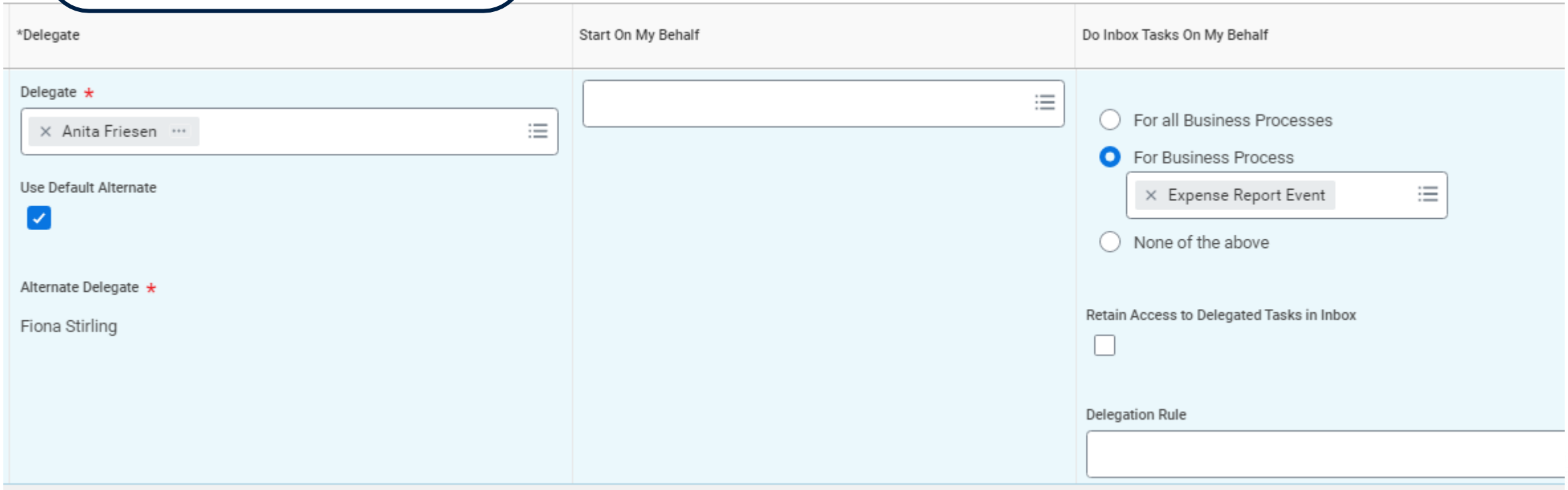
Another way to find business processes allowed for delegation (initiation) is to click 'By Business Process Type' here





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?

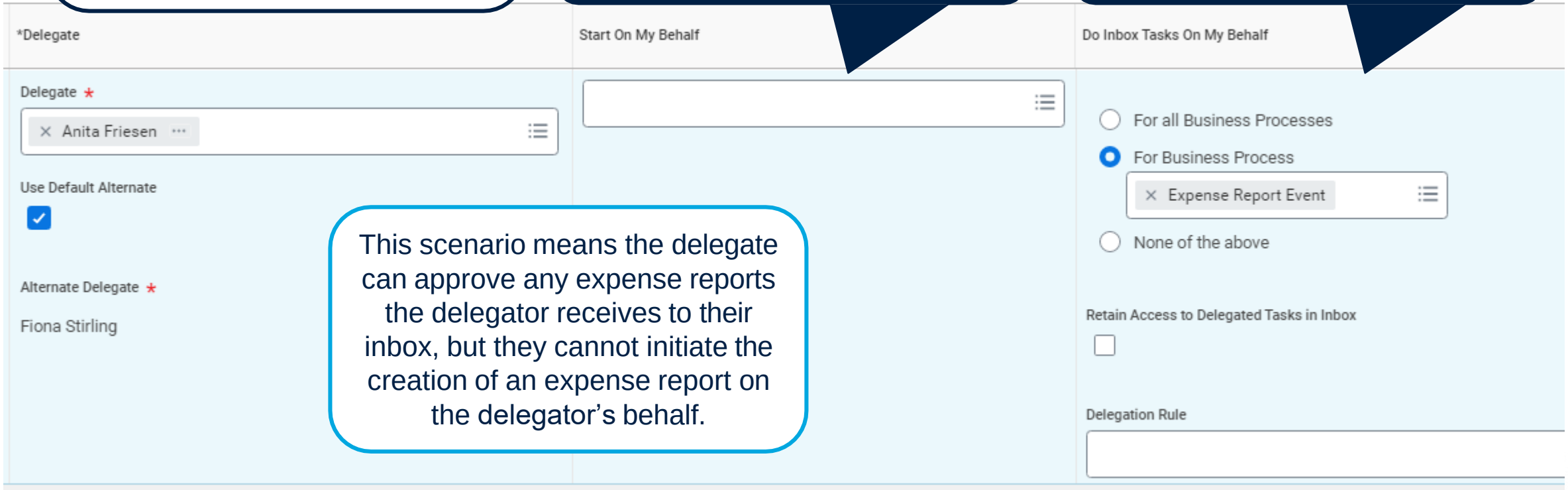


COMMON QUESTIONS AND ISSUES

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.

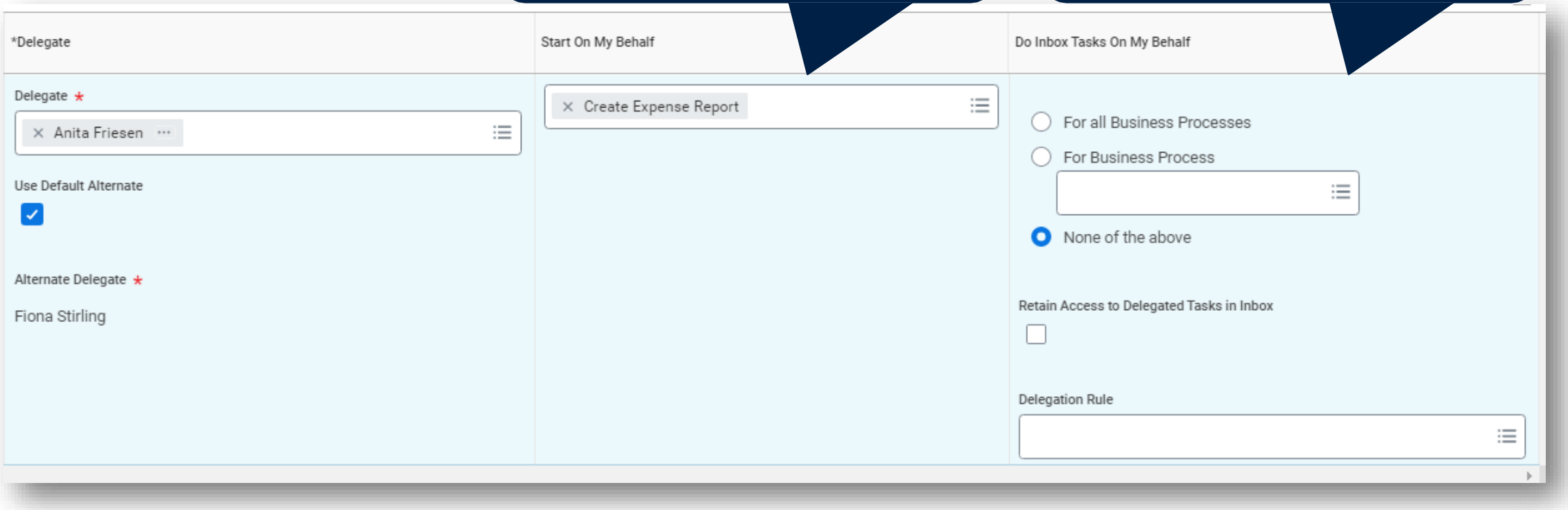


This scenario means the delegate can approve any expense reports the delegator receives to their inbox, but they cannot initiate the creation of an expense report on the delegator's behalf.

COMMON QUESTIONS AND ISSUES

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

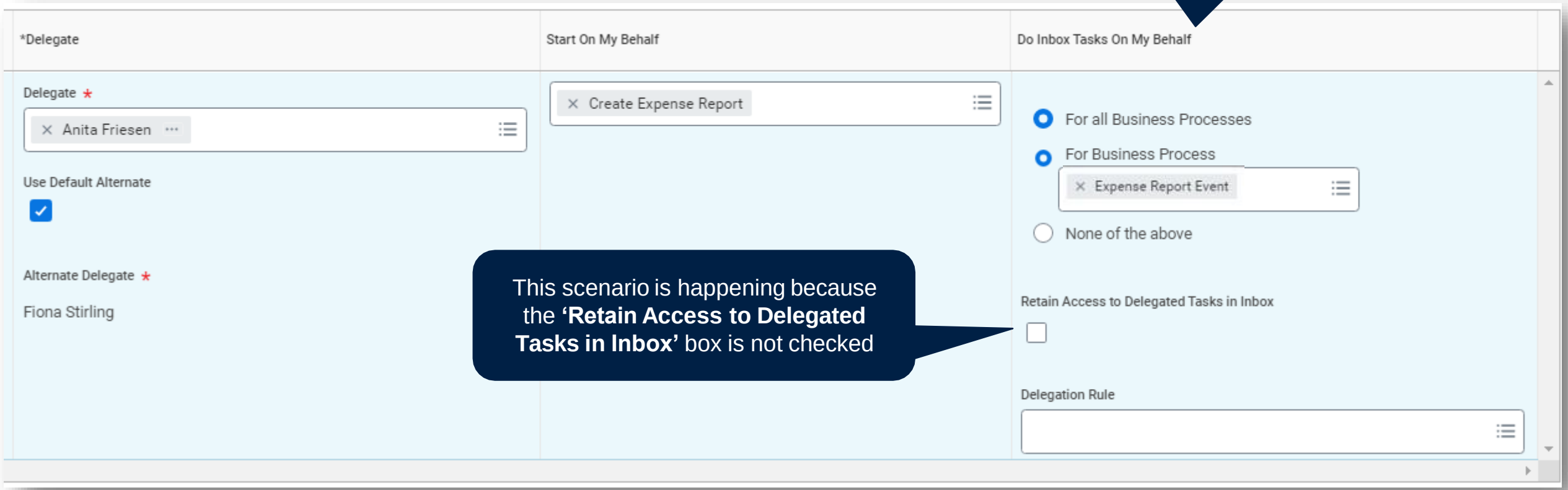
We'd switch the **'Do Inbox Tasks On My Behalf'** column to **None of the Above** (assuming there are no approvals needing to be delegated)



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?

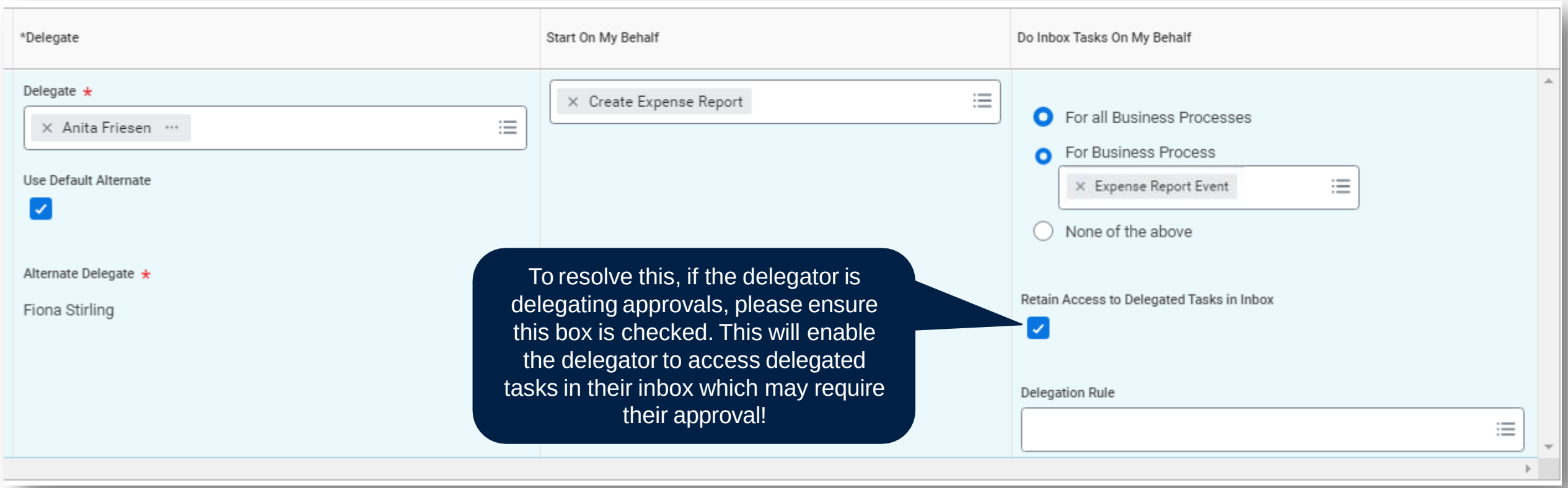
This option is only available when the delegator has set up approval delegations in the **'Do Inbox Tasks on My Behalf'** column. If this column is empty, there's no need to worry about this scenario.



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?



DELEGATIONS – NON-PO INVOICES

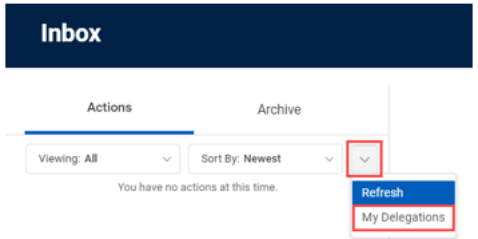
Non-PO Invoices are received by supplier and entered by Accounts Payable. They will route to the employee identified on the invoice. This task can be delegated to another employee.

Step 1: Open My Delegations

1a. Open Workday.

Click the **inbox icon** in top right corner of the screen.

On your inbox item page, click on the **arrow button** beside **Sort By** and select **My Delegations** from the dropdown options.

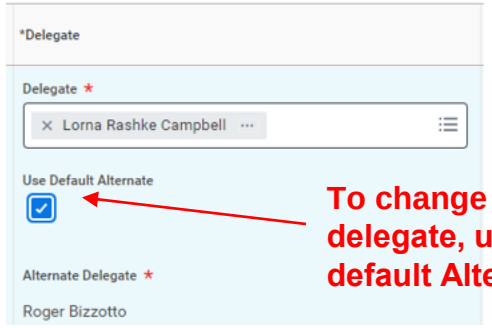


Step 2: Assign a New Delegation

2a. Scroll down the page and click the **Manage Delegations** button.

2b. Scroll down to the **New Delegation** table and complete the following fields:

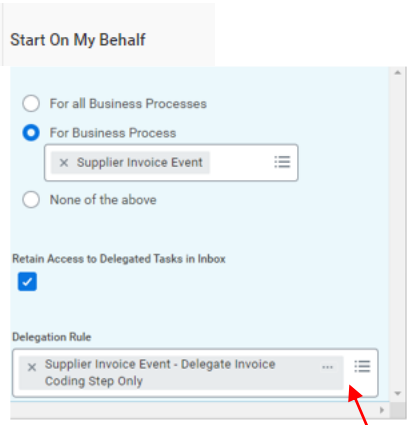
- **Begin Date** (required) – todays date
- End Date (optional) – Leave blank
- **Delegate**: Enter Lorna Campbell



To change the alternate delegate, uncheck "use default Alternate"

Identify the delegate AND CHANGE the alternate Delegate, as the delegates manager will populate automatically and likely we do not want the manager to be a delegate for this

- **Do Inbox Tasks on My Behalf**: Select one of the options.
  - **Click "For Business Process"**: type in **Supplier Invoice Event**
  - **Delegation Rule**: [Select value "Supplier Invoice Event – Delegate Invoice Coding Step Only"]*



Under Column "Start on my behalf" Choose "supplier invoice event" from drop down

2e. Click **Submit** to confirm the delegation.

Must select "Supplier Invoice Event - Delegate Invoice Coding Step Only", otherwise delegating budget approval

DELEGATION BY DELEGATES

If the delegate is on vacation, or otherwise away from work, and has set up their own delegations, any tasks delegated to them will **not** be included in those delegations. For example:

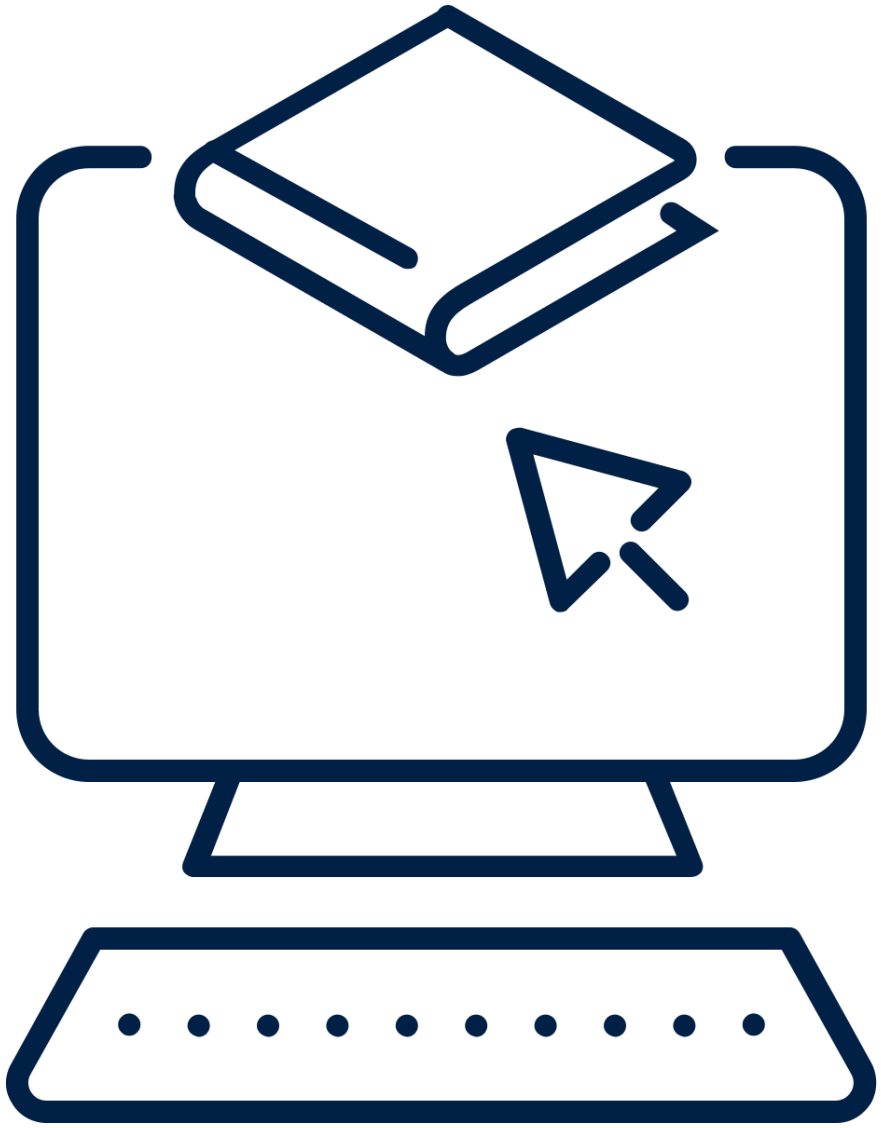
- Morgan delegated their approval tasks to Taylor,
- Taylor goes on vacation and delegates their approvals tasks to Sam,
- Sam will only receive Taylor's tasks as the delegate, not Morgan's tasks that have been sub-delegated. Morgan will need to assign a new delegate in Taylor's absence.

COMMON DELEGATED TASKS

Start on my Behalf:

- Create Expense Report
- Create Spend Authorization
- Checkout (allows delegate to create a purchase Requisition on their behalf). NOTE: If this is set up, the delegator will have to complete ALL the related purchase order inbox tasks.
- Create Receipt
- Hire, Change Job, Create Position*

** May also have to add delegate as "Primary Recruiter" for posted positions to ensure they can move the hire process forward*



WORKDAY DEMO

Q & A

UPCOMING WORKDAY WEDNESDAY SESSION

Topic: Security Role & Assignments

Meeting Link

Hosts: Carri Lawrence & Fiona Stirling

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