

Workday: Delegation Cheat Sheet

Topics Covered:

Delegating Finance Tasks in Workday

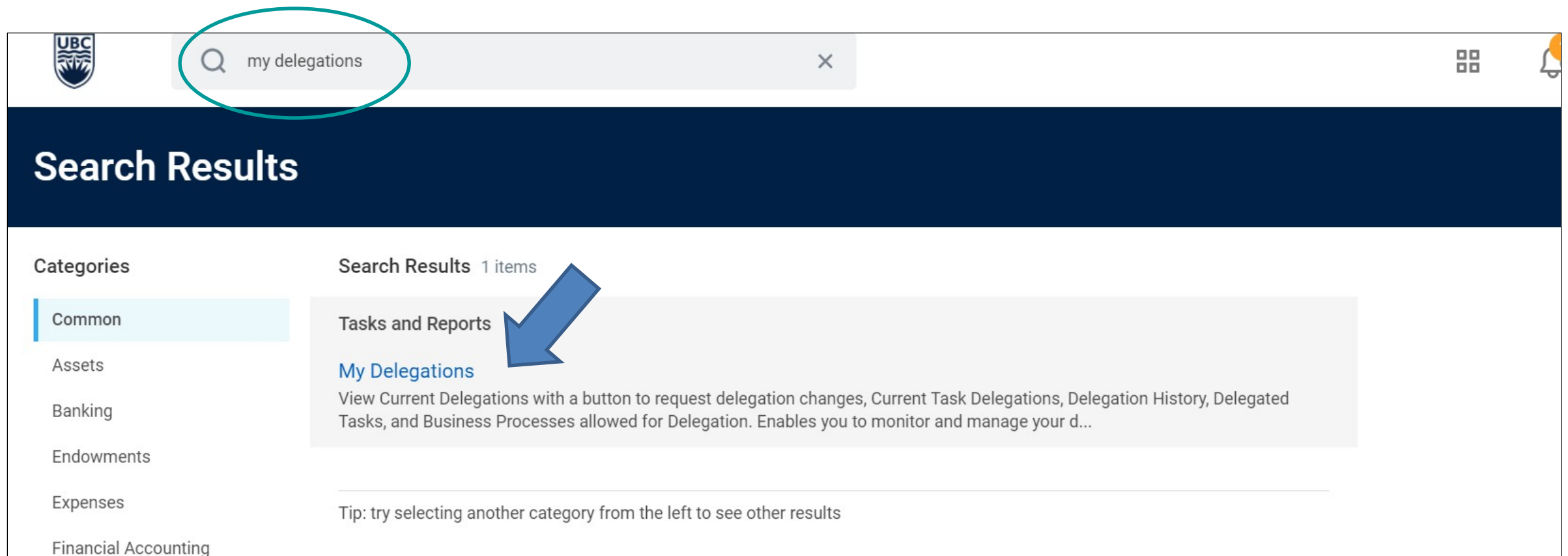
Delegating Your Inbox in Workday

Approving Items in Your Workday Inbox

Delegating Finance Tasks in Workday:

How to delegate to your lab support person or to the Department Admin Team

Step 1: In the top left search bar, enter “my delegations”, click on “My Delegations”



The screenshot shows the Workday search interface. At the top left is the UBC logo. A search bar contains the text "my delegations" and is circled in teal. To the right of the search bar are icons for a grid and a notification bell. Below the search bar is a dark blue header with the text "Search Results". On the left side, there is a "Categories" list with "Common" selected. The main content area shows "Search Results 1 items" and a result card for "Tasks and Reports" with a blue arrow pointing to the "My Delegations" link. Below the result card is a tip: "Tip: try selecting another category from the left to see other results".

Categories

- Common
- Assets
- Banking
- Endowments
- Expenses
- Financial Accounting

Search Results 1 items

Tasks and Reports

[My Delegations](#)

View Current Delegations with a button to request delegation changes, Current Task Delegations, Delegation History, Delegated Tasks, and Business Processes allowed for Delegation. Enables you to monitor and manage your d...

Tip: try selecting another category from the left to see other results

Delegating Finance Tasks in Workday:

How to delegate to your lab support person or to the Department Admin Team

Step 2: Once in the “My Delegations” page, click the “Manage Delegations” box at the bottom

UBC

my delegations

My Delegations

For **Your Name**

Current Delegations | Current Task Delegations | Delegation History | Delegated Tasks | Business Processes allowed for Delegation

0 items

Begin Date	End Date	Delegate	Retain Access to Delegated Tasks in Inbox
No Data			

Manage Delegations

Delegating Finance Tasks in Workday:

How to delegate to your lab support person:

Step 3a: You can now start entering your delegate's name and the delegation begin and end dates

- **BEGIN DATE:** Enter Begin Date using calendar (retro date is not allowed.)
- **END DATE:** Enter End Date using calendar. If ongoing, do not enter end date.
- Enter the name of your delegate.

> Business Processes allowed for Delegation

New Delegation 4 items

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
	YYYY-MM-DD	YYYY-MM-DD	<p>Delegate *</p> <input type="text"/>	<input type="text"/>	<p><input type="radio"/> For all Business Processes</p> <p><input type="radio"/> For Business Process</p> <input type="text"/> <p><input checked="" type="radio"/> None of the above</p> <p>Retain Access to Delegated Tasks in Inbox</p> <input type="checkbox"/>

Submit Save for Later Cancel

2020-11-05 Delegate *
× Create Expense Report
× Create Receipt
× Danielle Marcantuoni (On Leave)

Delegation Rule

Delegating Finance Tasks in Workday:

Step 3b: If you **don't have a support person in your lab, enter the following three Admin team personnel as delegates:**

- **Danielle Marcantuoni (On Leave):** Enter current date as Begin Date/Do not select End Date (ongoing).
- **Bree Wilson:** Enter current date as Begin Date/Do not select End Date (ongoing).
- **Gloria Park:** Enter current date as Begin Date/End Date as **2021-01-08 (Jan 8, 2021)**

Delegating Finance Tasks in Workday:

Step 3c: Once Department Admin Team delegates are entered, check off “Use Default Alternate” boxes

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
	2020-11-05		<p>Delegate *</p> <p>× Danielle Marcantuoni (On Leave) ...</p> <p>Use Default Alternate <input checked="" type="checkbox"/></p> <p>Alternate Delegate *</p> <p>Amity Chiang</p>	<p>× Create Expense Report</p> <p>× Create Spend Authorization</p>	<p><input type="radio"/> For all Business Processes</p> <p><input type="radio"/> For Business Process</p> <p><input checked="" type="radio"/> None of the above</p> <p>Retain Access to Delegated Tasks in Inbox <input type="checkbox"/></p>
	2020-11-05		<p>Delegate *</p> <p>× Bree Wilson ...</p> <p>Use Default Alternate <input checked="" type="checkbox"/></p> <p>Alternate Delegate *</p> <p>Amity Chiang</p>	<p>× Create Expense Report</p> <p>× Create Spend Authorization</p>	<p><input type="radio"/> For all Business Processes</p> <p><input type="radio"/> For Business Process</p> <p><input checked="" type="radio"/> None of the above</p> <p>Retain Access to Delegated Tasks in Inbox <input type="checkbox"/></p>
	2020-11-05	2021-01-08	<p>Delegate *</p> <p>× Gloria Park ...</p> <p>Use Default Alternate <input checked="" type="checkbox"/></p> <p>Alternate Delegate *</p> <p>Amity Chiang</p>	<p>× Create Expense Report</p> <p>× Create Spend Authorization</p>	<p><input type="radio"/> For all Business Processes</p> <p><input type="radio"/> For Business Process</p> <p><input checked="" type="radio"/> None of the above</p> <p>Retain Access to Delegated Tasks in Inbox <input type="checkbox"/></p>

enter your comment

Submit Save for Later Cancel

Delegating Finance Tasks in Workday:

Step 4: Under “Start On My Behalf”, enter:

- **Create Expense Report and**
- **Create Spend Authorization**

Step 5: Click “Submit” to complete your delegation

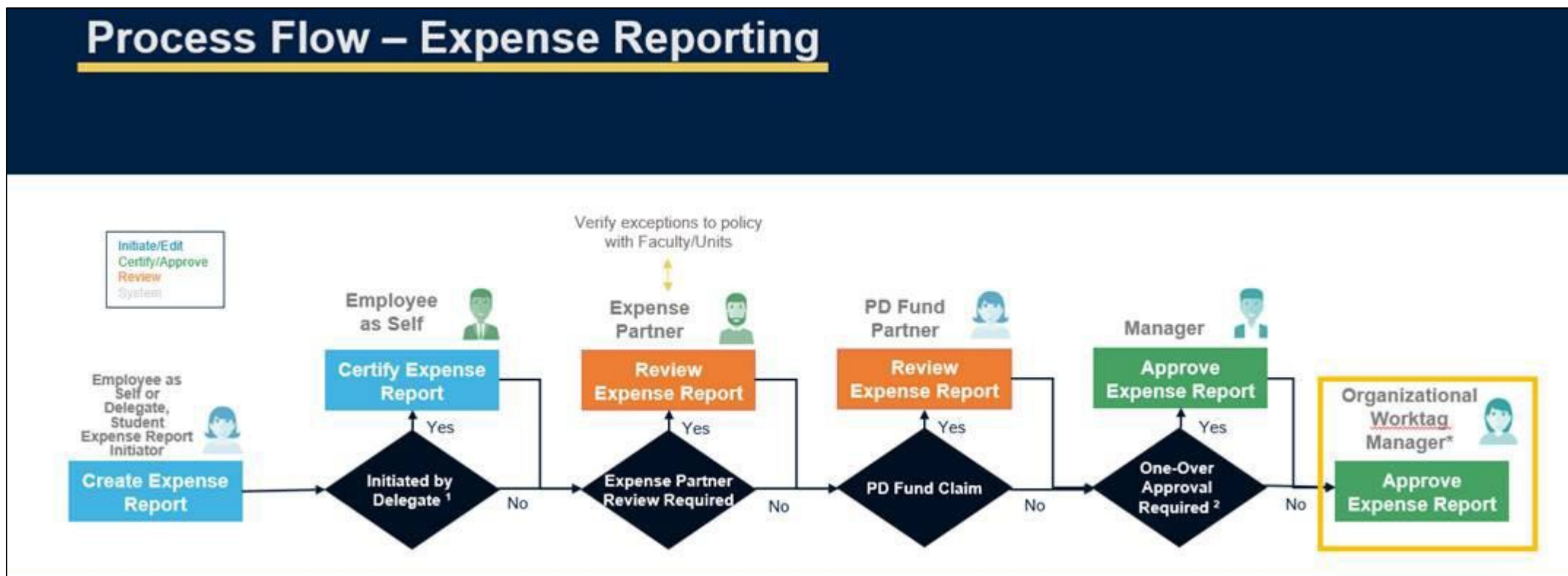
+/-	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
-	2020-11-05		Delegate * x Danielle Marcantuoni (On Leave) ... Use Default Alternate <input checked="" type="checkbox"/> Alternate Delegate * Amity Chiang	<input checked="" type="checkbox"/> Create Expense Report <input checked="" type="checkbox"/> Create Spend Authorization	<input type="radio"/> For all Business Processes <input type="radio"/> For Business Process <input checked="" type="radio"/> None of the above Retain Access to Delegated Tasks in Inbox <input type="checkbox"/>
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enter your comment

Remember:

Once your delegate initiates and submits your reimbursement, it will ultimately come back to you to certify the reimbursement.

You will need to certify (“approve”) your expense via your Workday Inbox.



Delegating Your Inbox in Workday:

Step 1: Select Begin Date/End Date. If delegation is ongoing, do not enter End Date

Step 2: Assign Delegate (ie. your lab support person), and **uncheck** the “Use Default Alternate” box

Step 3: As Alternate Delegate, assign a secondary support person, or the Director of Administration (Vicky Yau)

Step 4: Under “Do Inbox Tasks On My Behalf” select “For All Business Processes” and check off “Retain Access to Delegated Tasks in Inbox” box

Step 5: Click “Submit” to complete Inbox Delegation

The screenshot shows the Workday inbox delegation form with the following fields and options:

- *Begin Date:** 2020-11-05
- End Date:** YYYY-MM-DD
- *Delegate:** Delegate *
- Use Default Alternate:** (circled in blue)
- Alternate Delegate:** Delegate 2 or Vicky Yau...
- Start On My Behalf:** (empty field)
- Do Inbox Tasks On My Behalf:**
 - For all Business Processes (circled in blue)
 - For Business Process
 - None of the above
- Retain Access to Delegated Tasks in Inbox:** (circled in blue)
- Comments:** enter your comment
- Buttons:** Submit (circled in green), Save for Later, Cancel

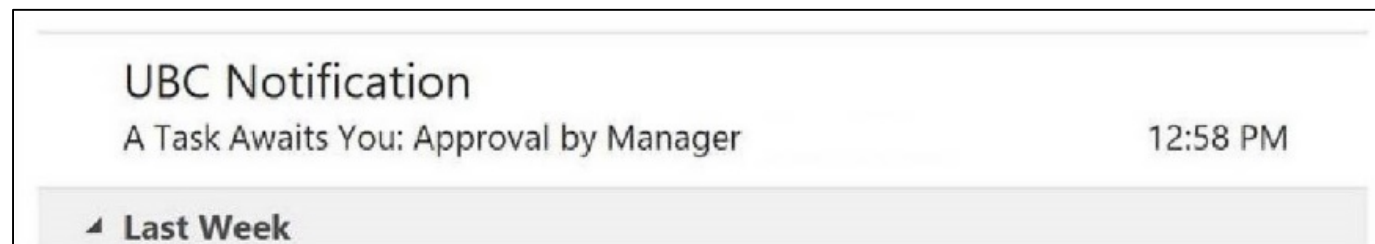
Approving Items in Your Workday Inbox

Who Needs to Approve Workday Inbox Items?

Supervisors (sup org manager) /PIs (Budget Owner/individual who has PG signing authority) MUST approve items in their Workday Inbox

How Do I Know If I Have Items to Approve?

a). You will receive notifications from UBC workday to your email.



When you see subject line "**A Task Awaits You: [Description of Task]**" then it means you have item(s) to approve in your inbox in Workday.

Approving Items in Your Workday Inbox

How Do I Know If I Have Items to Approve? (continued)

b). In addition to notifications to your email, you will also see both Finance & HR items requiring your approval in your **Workday Inbox**.

Your Inbox will appear as below in Workday. **Action** items are items awaiting your approval, and are listed on the left.

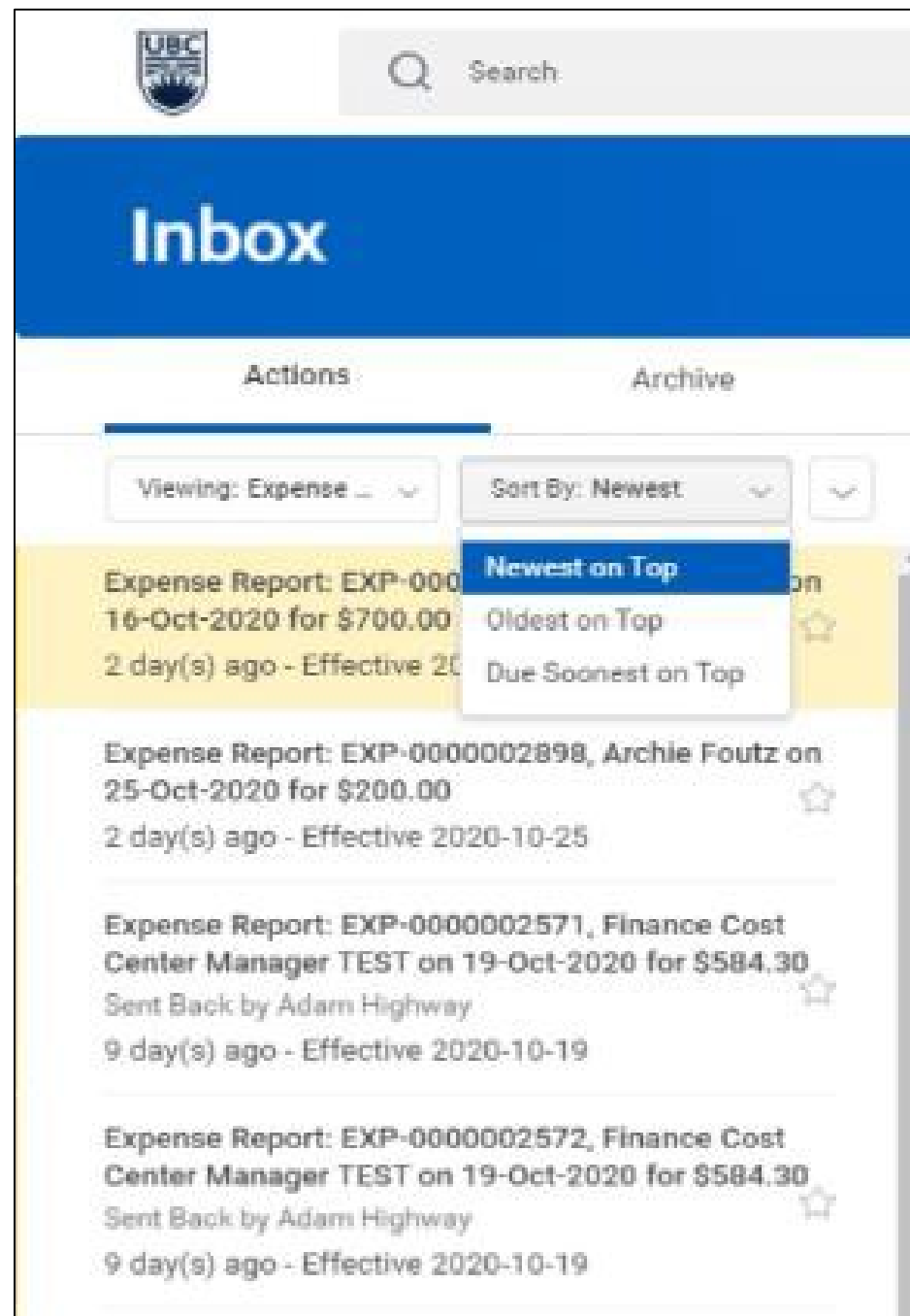
As the approver, you can view approval Action items by Transaction Type

The screenshot displays the Workday user interface. At the top left is the UBC logo and a search bar. The main header is blue with the word "Inbox" in white. A purple callout box points to a dropdown menu in the "Actions" section, with the text "Click to Sort Inbox by Transaction Type". The "Actions" section shows a list of items, with "Change Order" highlighted. A red box with a "1" is around the "Viewing: Change O..." dropdown, and another red box with a "2" is around the "Change Order" item. The right side of the screen shows a "Review" section for a "Change Order: Annex Consulting Group Inc. on 25-Jun-2020 for \$38,400.00". Below this, there are details for "For", "Overall Process", "Overall Status", and "Due Date". At the bottom, there is a "Details to Review" section with fields for "Purchase Order", "Version", and "Change Order Status".

Approving Items in Your Workday Inbox

How Do I Know If I Have Items to Approve? (continued)

- c). Or, by default, the newest items will appear at the top of the inbox (see below). You can sort items by Newest on Top, Oldest on Top, or Due Soonest on Top.



Approving Items in Your Workday Inbox

Once you have clicked on the Action item and reviewed, click “Approve” to complete the Approval process.

The screenshot displays a Workday inbox interface. At the top left, the word "Inbox" is visible. Below it, there are tabs for "Actions (1)" and "Archive". A dropdown menu shows "Viewing: All" and "Sort By: Newest". A list item is highlighted with a red box: "Expense Report: EXP-0000000486, Bernard Chan on 20-Apr-2020 for \$100.00" with a star icon and "1 minute(s) ago - Effective 2020-04-20". A callout bubble points to this item with the text "Click on Action Item".

To the right, the "Approve Expense Report" screen is shown for "EXP-0000000486 This is a test Expense". It includes a "Actions" button, a star icon, a calendar icon, a printer icon, a settings icon, and a refresh icon. The report details are as follows:

2 hour(s) ago - Effective 2020-04-20	Status	Personal	Company Paid	Prior Balance Applied	Cash Advance Applied
Pay To: Employee: Bernard Chan	In Progress	0.00 CAD	0.00 CAD	0.00 CAD	0.00 CAD
Reimbursement	Total				
100.00 CAD	100.00 CAD				

Below the details, there are tabs for "Header", "Attachments", "Business Process", and "Expense Lines". The "Header" tab is selected and highlighted with a red box. A callout bubble points to it with the text "Click on Header".

The "Header" section contains the following information:

- Spend Authorization: (empty)
- Final Expense Report: No
- Expense Report Number: EXP-0000000486
- Memo: This is a test Expense
- Company: UBC The University of British Columbia
- Expense Report Date: 2020-04-20
- Enable Tax: Yes
- Reimbursement Payment Type: Direct Deposit

At the bottom right of the header section, it says "Tax Applicability: GST/PST Purchase of Goods & Services - GST Rebate eligible".

Below the header, there is an "Instructions" section highlighted with a red box. The text reads: "As a budget approver for the following expense report, please review. If changes are required, please use the [Send Back](#) action to return this request to the appropriate individual for them to make the changes."

At the bottom of the screen, there are four buttons: "Approve" (highlighted with a green circle), "Send Back", "Add Approvers", and "Close".