Workday: Delegation Cheat Sheet

Topics Covered:

Delegating Finance Tasks in Workday

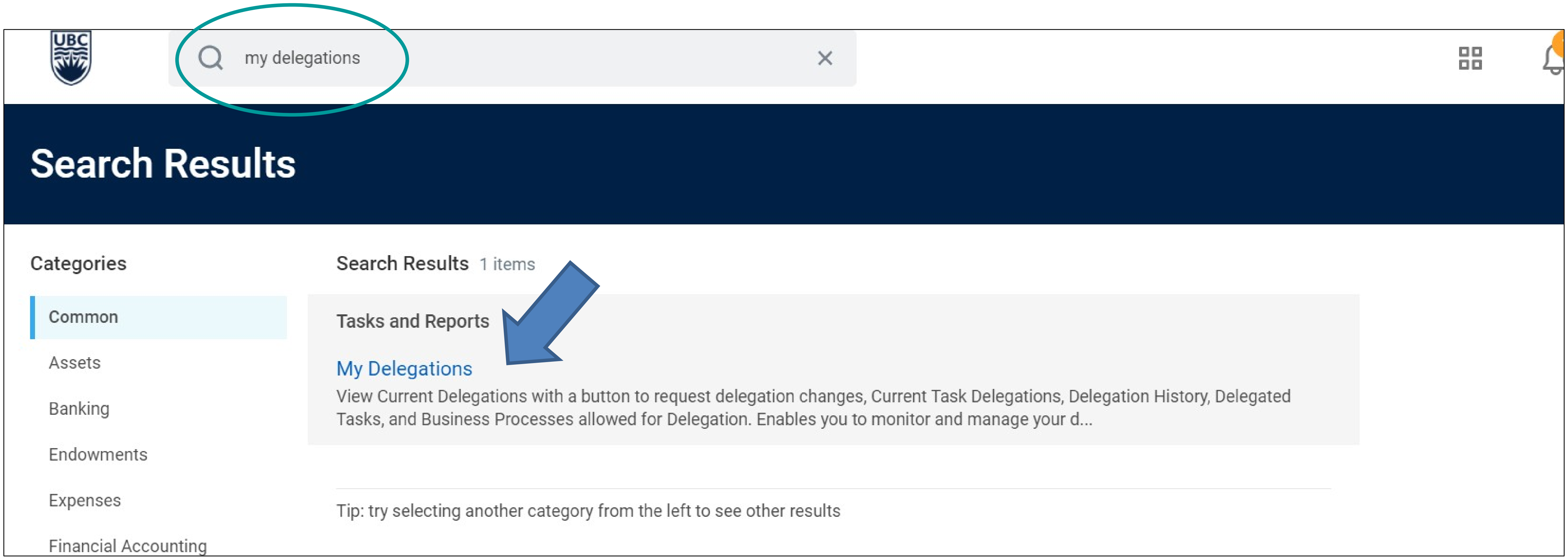
Delegating Your Inbox in Workday

Approving Items in Your Workday Inbox

Delegating Finance Tasks in Workday:

How to delegate to your lab support person <u>or</u> to the Department Admin Team

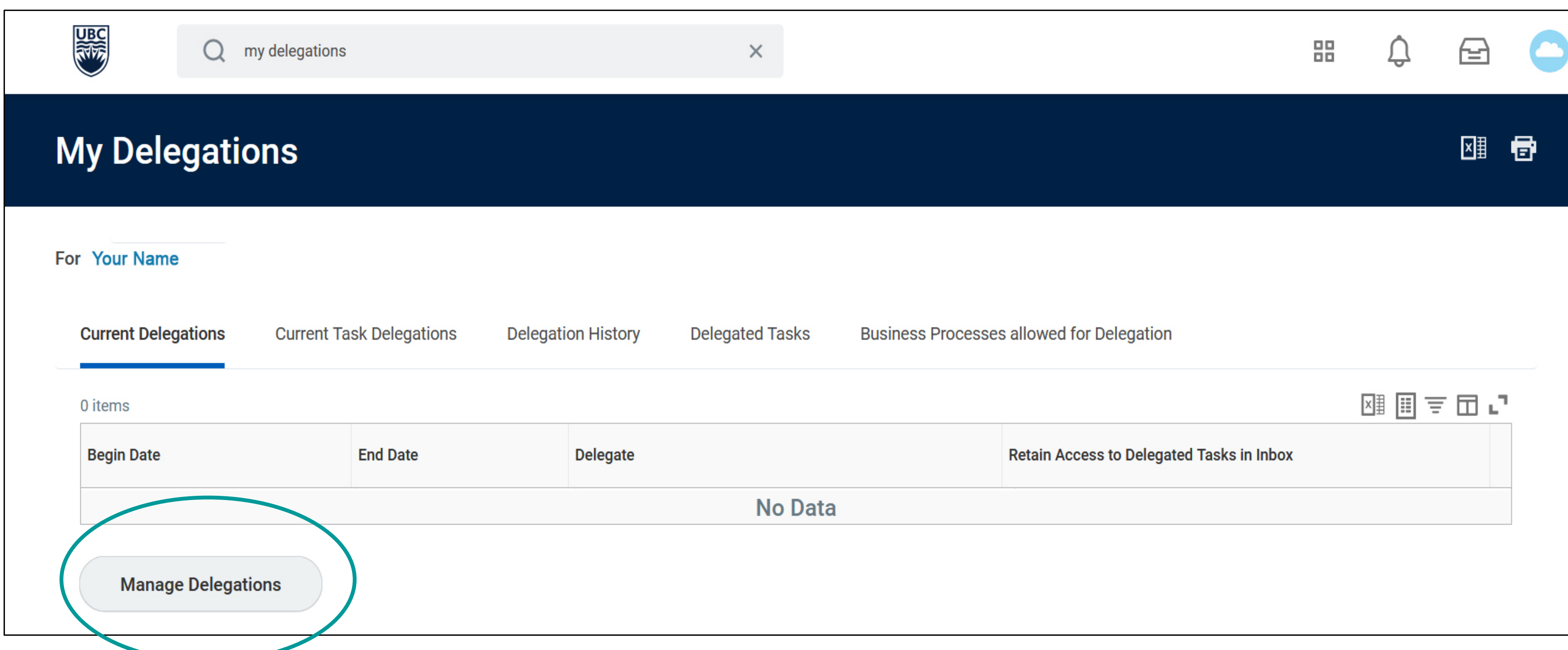
Step 1: In the top left search bar, enter "my delegations", click on "My Delegations"



Delegating Finance Tasks in Workday:

How to delegate to your lab support person <u>or</u> to the Department Admin Team

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

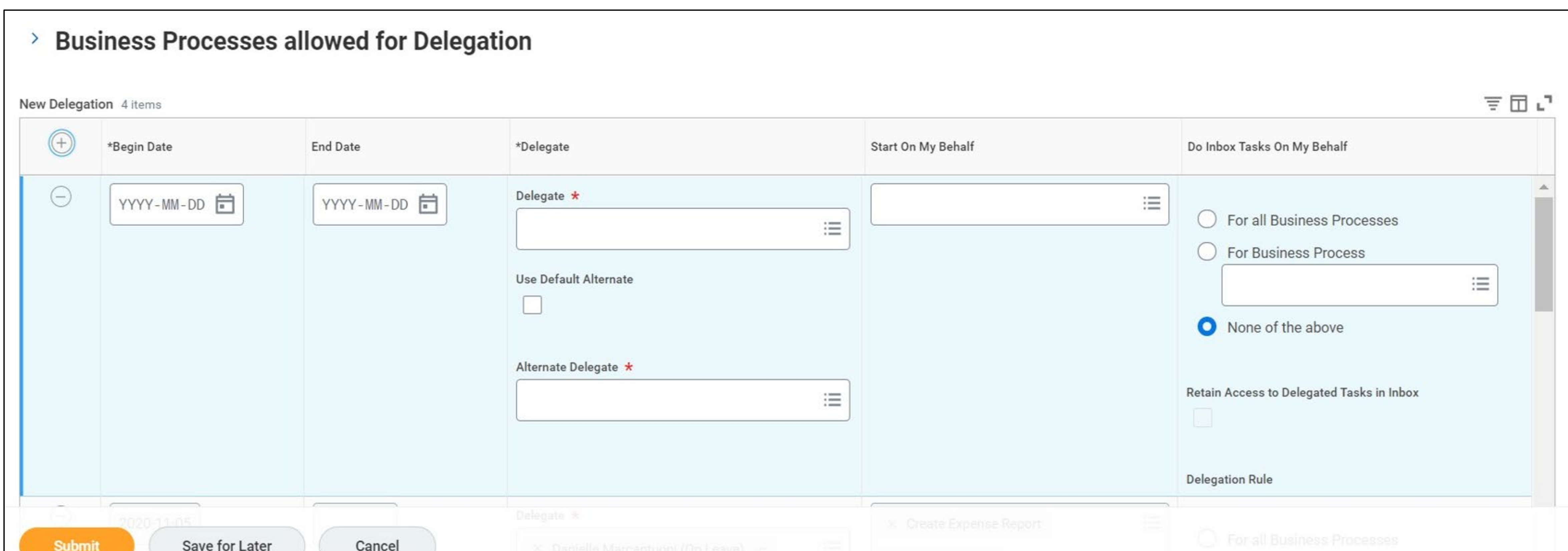


Delegating Finance Tasks in Workday:

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. <u>If ongoing</u>, do not enter end date.
- Enter the name of your delegate.



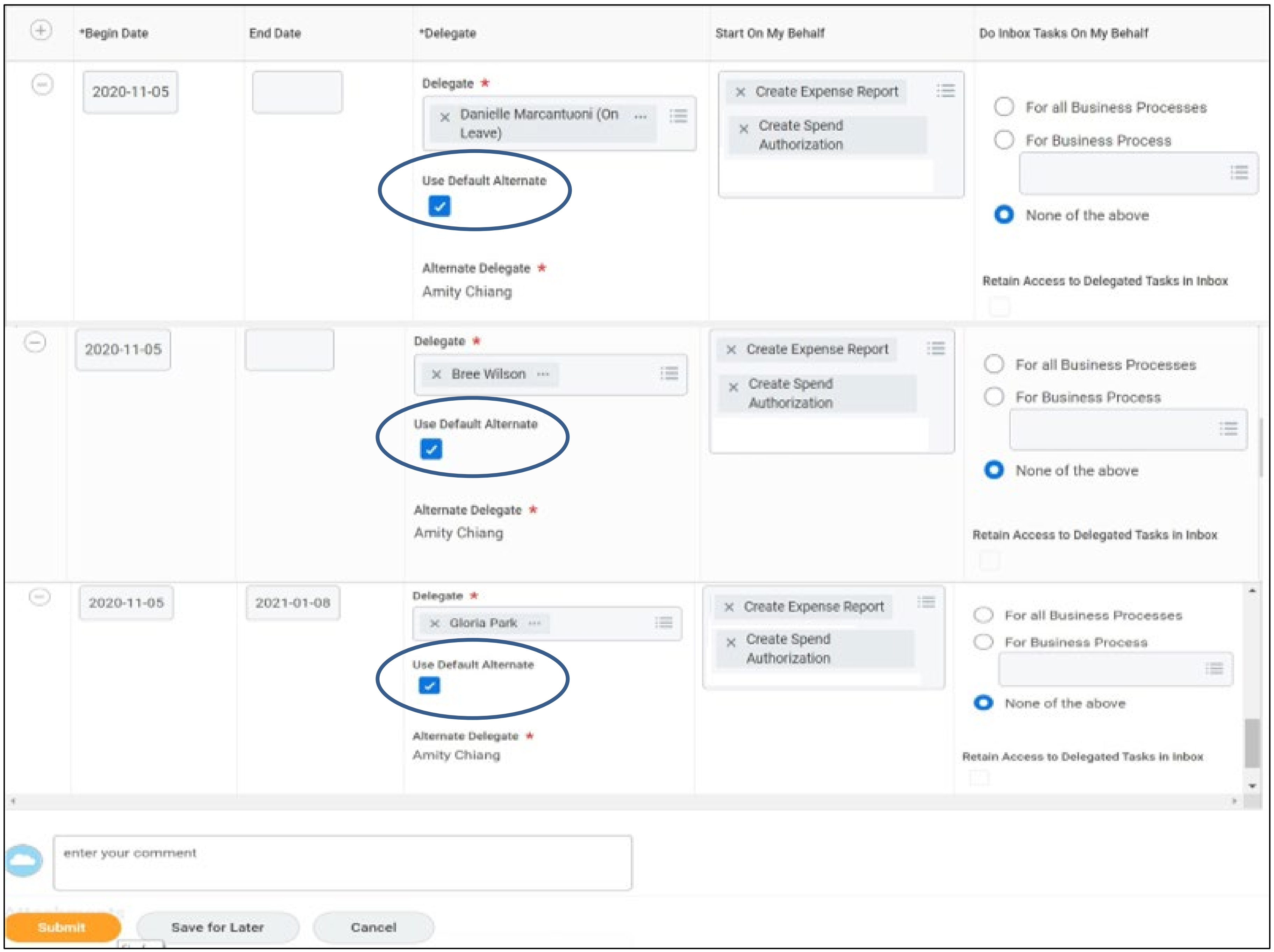
Delegating Finance Tasks in Workday:

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

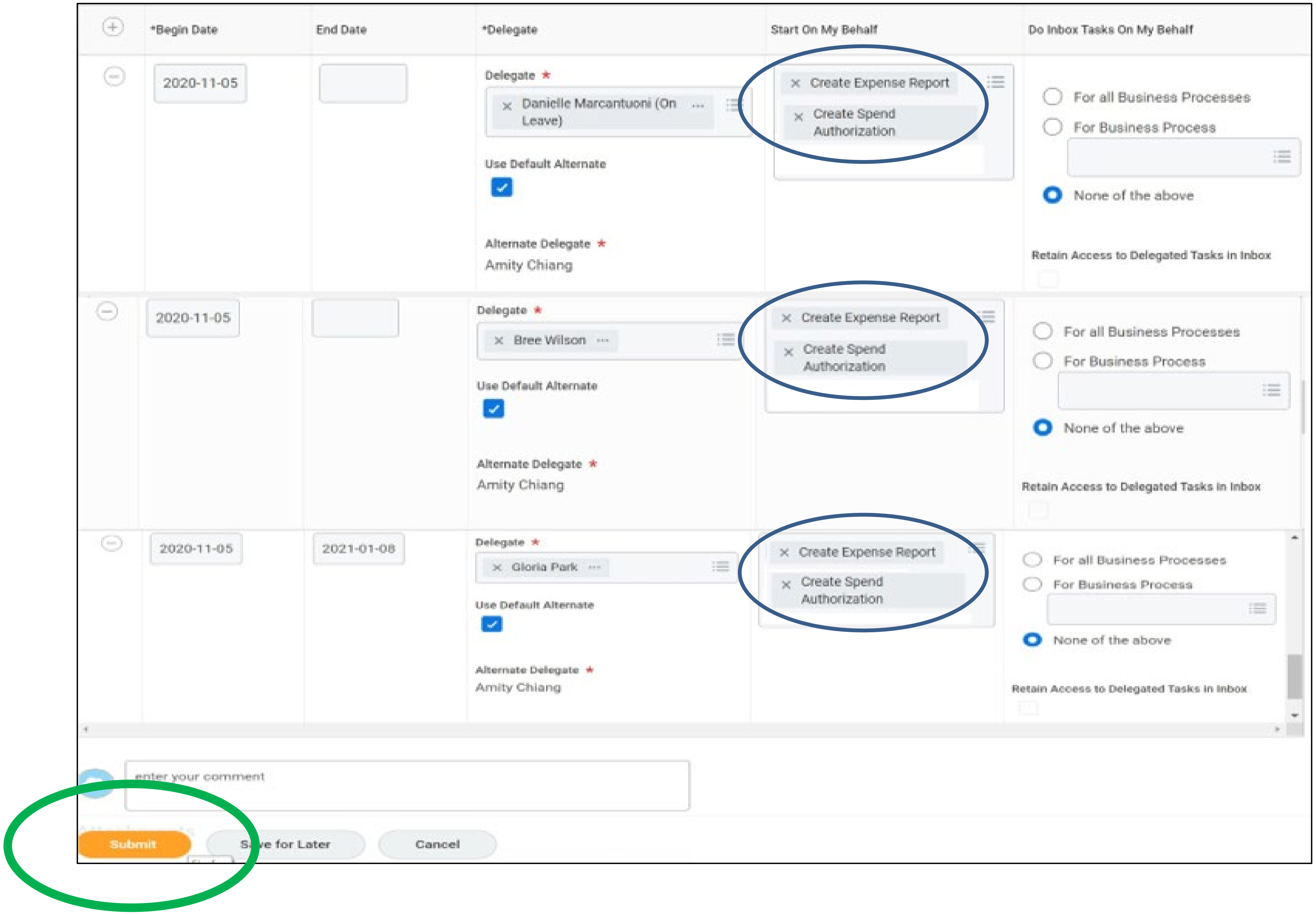


Delegating Finance Tasks in Workday:

Step 4: Under "Start On My Behalf", enter:

- **Create Expense Report <u>and</u>**
- **Create Spend Authorization**

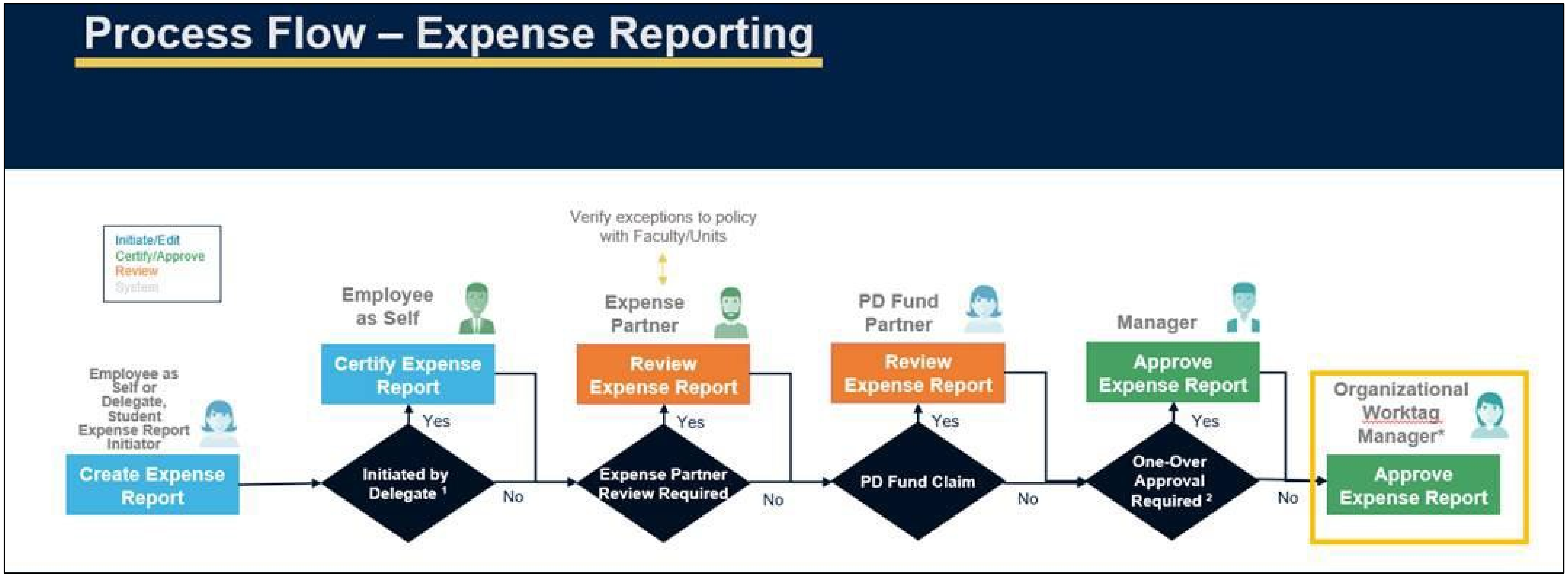
Step 5: Click "Submit" to complete your delegation



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:

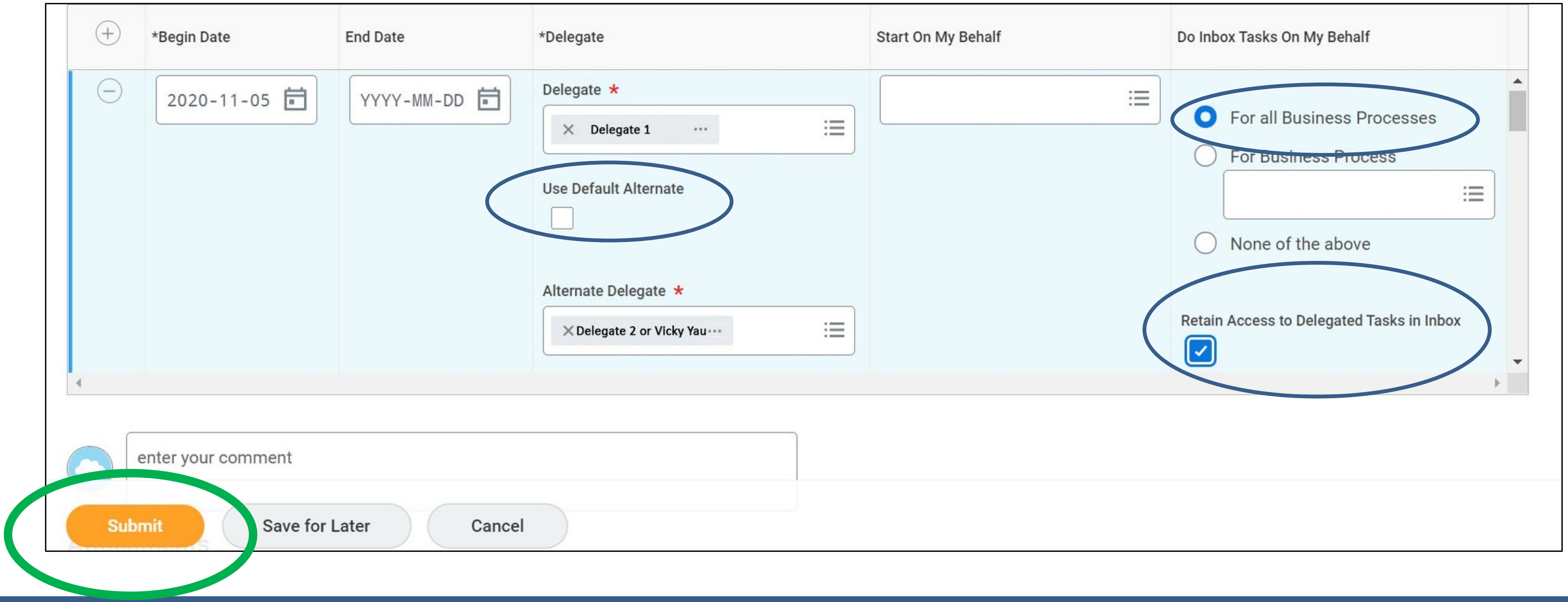
Step 1: Select Begin Date/End Date. If delegation is ongoing, do not enter End Date

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



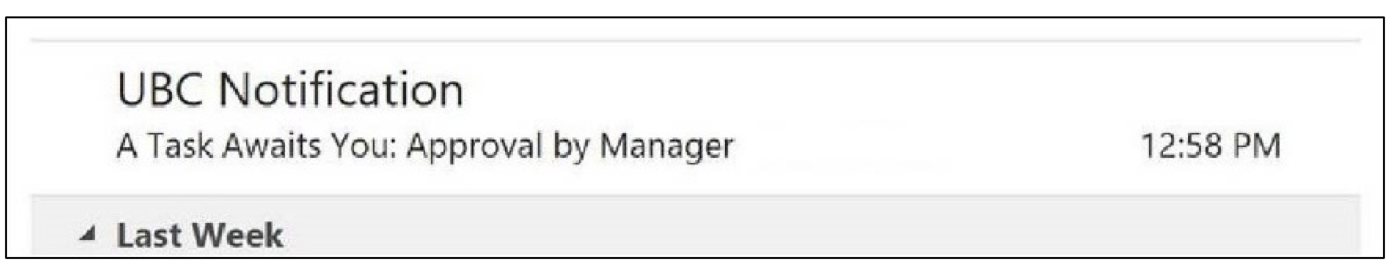
Approving Items in Your Workday Inbox

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.

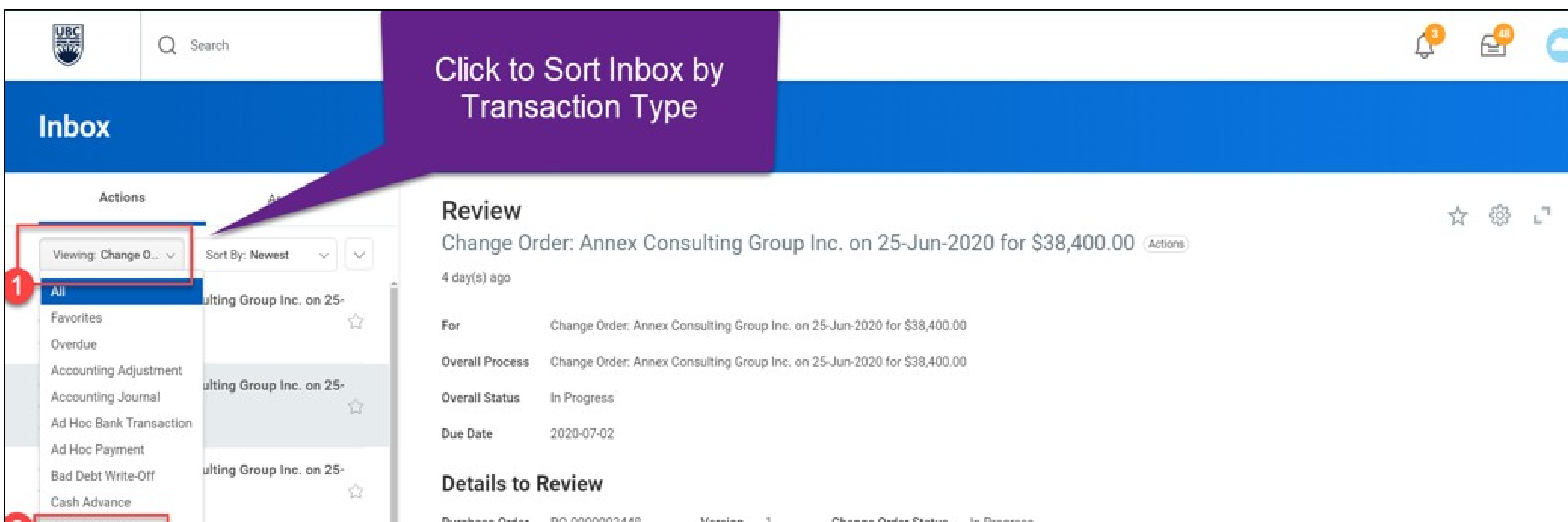
Approving Items in Your Workday Inbox

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.

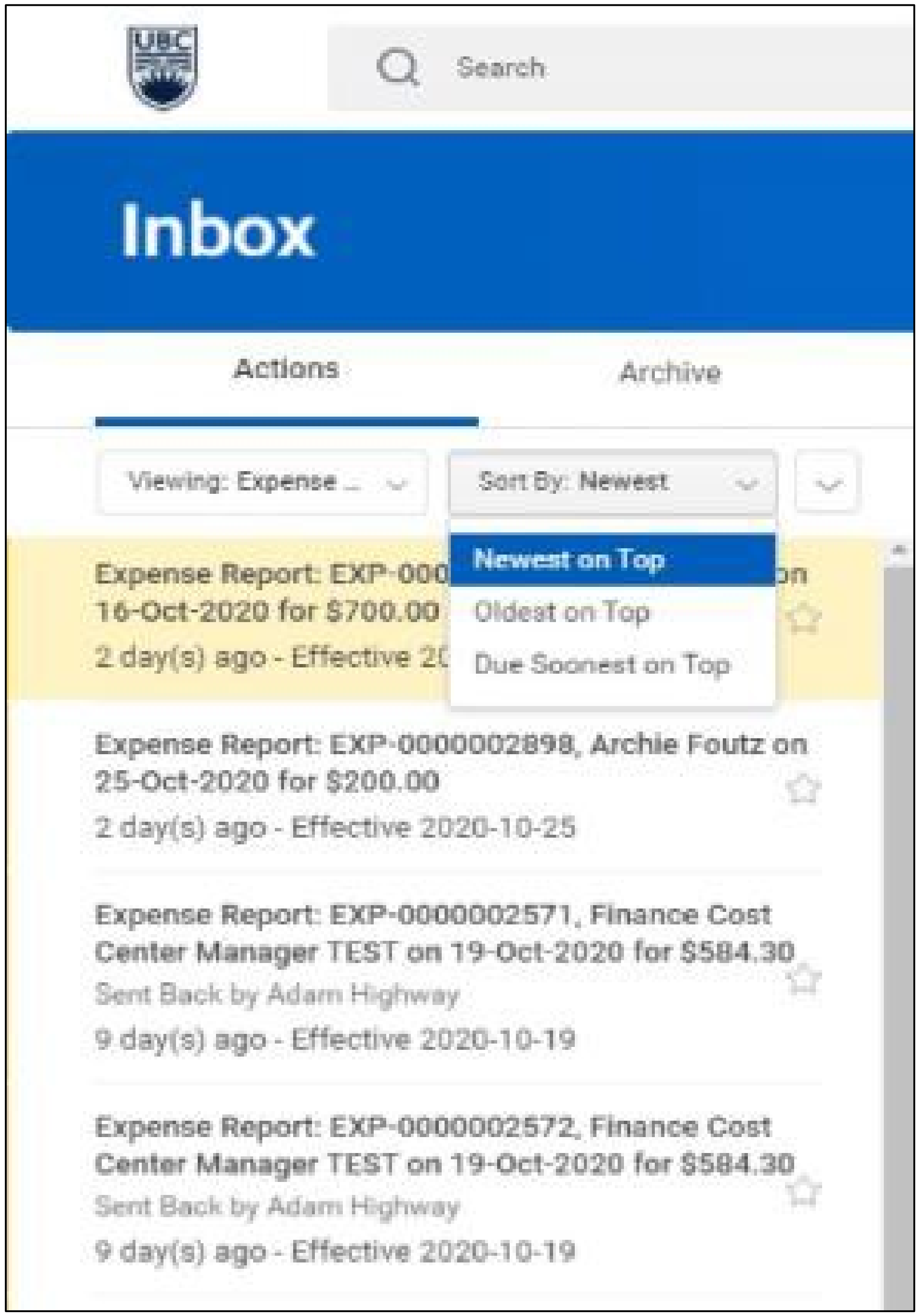
As the approver, you can view approval Action items by Transaction Type



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.