Delegate Workday Transactions Overview

This Quick Reference Guide (QRG) is designed to walk **employees** through the delegation process in Workday. Delegations are temporary reassignments of tasks to another person, enabling them to perform actions on your behalf. The delegation may pertain to initiating processes, approving transactions, or delegating specific actions to someone. If you are delegated a task, you will receive a notification in Workday as well an email notification. If you are not receiving an email, refer to the Set Up Email Delegations Notification section for how to update your notification preferences.

NOTE	**Please Note:** all delegations require approval except for expense reports. Create Expense Reports can be delegated for more than 12 months and does not require approval; however, if there is an existing HCM/FIN delegation then it will require approval. Workday is sending the existing delegation and the new delegation request to approvers instead of the create expense report assignment being immediate.
	The project team is actively working on a long-term solution but in the interim you can fill out the Mass Delegations Requests template and submit it to askfinance@virginia.edu to set up delegations that bypass approval for expense reports. When filling out the template, just edit the yellow columns (employee's computing ID) as the other fields will populate.

HINT	If you want to **delegate expense reports** to another employee, select Create Expense Report in the Start On My Behalf field and leave the Do Inbox Tasks On My Behalf section **blank**. The Do Inbox Tasks On My Behalf section is strictly for performing specific actions from the delegator's inbox such as reviewing and approving inbox tasks. For more guidance and steps on delegating expense reports, refer to the Set up a Delegate for Initiating Expense Reports section.

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Set Up Delegations

On the Workday **Home** screen:

1. Type **My Delegations** in the search field.
2. Select the **My Delegations** report from the **Search Results**.

NOTE	You can also access My Delegations from your Inbox.

On **My Delegations** screen:

3. Click the **Manage Delegations** button.

On the second **My Delegations** screen:

4. Complete the following required fields:
    *   **Begin Date** – enter the start date of delegation.
    *   **End Date** – enter the end date of delegation.

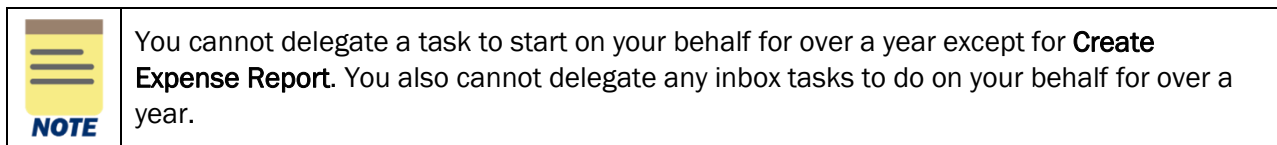| NOTE	You cannot delegate a task to start on your behalf for over a year except for **Create Expense Report**. You also cannot delegate any inbox tasks to do on your behalf for over a year.

*   **Delegate** - enter and select the name of the employee to whom you want to delegate the business process.
    o   You can have more than one delegate; to do this, click in the filled-out Delegate field and type the additional delegate's name and press enter.
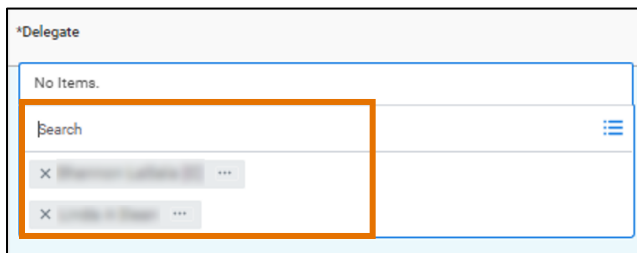
*   **Use Default Alternate** – will auto-select the delegate's primary manager. If you are okay with the default alternate, leave this checkbox selected. If you received an error message or if a

default alternate does not populate, deselect this checkbox and select a new alternate delegate.

> **NOTE**
>
> An **alternate delegate** is not your back up delegate but rather serves as an alternate approver. The alternate delegate field only pertains to delegating inbox tasks as a delegate themself cannot approve transactions that relate to them. This is to ensure the submitter does not receive and approve their own tasks as an approver.
>
> - **For Example**: A delegate is assigned to approve expense reports. The delegate themself submits an expense report; the expense report routes to the alternate delegate for approval instead of the delegate.

- **Start On My Behalf** - search the **Business Process** you want the delegate to **start** on your behalf. Select all the applicable Business Processes. If you do not want the employee to start a task on your behalf, leave this field **blank**.

> **NOTE**
>
> You may click **Business Processes allowed for Delegation** to see the complete list of business processes allowed for delegation.
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>

- **Do Inbox Tasks On My Behalf** – You can do the following:
  - For specific inbox tasks, complete the **For Business Process** field and select the inbox task you want the delegate to review and approve on your behalf.
  - Select the **For all Business Processes** checkbox if you want the delegate to have **access and approval authority** for all tasks you may receive. It is recommended to not select this checkbox unless you want the employee to have full access.
  - Leave this field **blank** if you do not want the employee to review and approve inbox tasks.

- **Retain Access to Delegated Tasks in Inbox** – If you did not leave the Do Inbox Tasks On My Behalf blank, **select this checkbox** to maintain delegation authority for yourself and still be able to assign it to other individuals.

> **NOTE**
>
> - Leave the **Delegation Rule** field blank.
> - The **Enter your comment** and **Attachments** fields are optional.

5. Click the **Submit** button at the bottom of the screen. If you receive an alert, bypass this by clicking **Submit** again.

You have successfully completed this task. All delegations require approval and cannot be for over a year; only **create expense reports** you can delegate for more than a year and **does not** require any approval.

Please see the following details regarding the approval routing for delegations:

- If the delegation request is less than 21 days, this will route to your **Manager** for approval.
- If the length of the delegation request is over 21 days, it will route to your **Manager** and the **Senior Department Finance Approver** for approval.
- if you are delegating a non-finance/HCM related task, this will route to **different approvers**.
- If you selected Create Expense Report in the Start On My Behalf field and left all other fields blank, there is no approval required. ***Please Note:*** *If you have an existing HCM or Finance delegation then Workday will still route this to approvers based on your existing delegation. You can submit a request to askfinance@virginia.edu to set up delegations that bypass approval.*
- If you selected Create Expense Report Create Expense Report in the Start On My Behalf field and selected another FIN or HCM task to delegate this will **route for approval**.

Set up a Delegate for Initiating Expense Reports

Expense reports can be delegated for more than 12 months and does not require approval. Select Create Expense Report **only** and leave Do Inbox Tasks On My Behalf section blank by ensuring the For all Business Processes and For Business Process fields are **not selected**. If not, Workday will prevent you from submitting the request (if it is more than 12 months) and will route for approval.

On the **Workday Home** screen:

1. Type **My Delegations** in the search field.
2. Select the **My Delegations** report from the **Search Results**.

On **My Delegations** screen:

3. Click the **Manage Delegations** button.

On the second **My Delegations** screen:

4. Complete the following required fields:
   - **Begin Date** – enter the start date of delegation.
   - **End Date** – enter the end date of delegation.
   - **Delegate –** search for and select the person who will be the delegate.

     o You can have more than one delegate; to do this, click in the filled-out Delegate field and type the additional delegate's name.

   - **Alternate Delegate** – will auto-select the delegate's primary manager. Clear the **Use Default Alternate** check box to select a different alternate delegate.

NOTE	An **alternate delegate** is not your back up delegate but rather serves as an alternate approver. The alternate delegate field only pertains to delegating inbox tasks as a delegate themself cannot approve transactions that relate to them. This is to ensure the submitter does not receive and approve their own tasks as an approver.
	For Example: A delegate is assigned to approve expense reports. The delegate themself submits an expense report; expense reports route to the alternate delegate for approval instead of the delegate.

5. In the **Start On My Behalf** field, click the field and select **All**.
6. From the drop-down list, select:
   - **Create Expense Report**
   - **Create Spend Authorization** (optionally)

Start On My Behalf

× Create Expense Report

× Create Spend Authorization
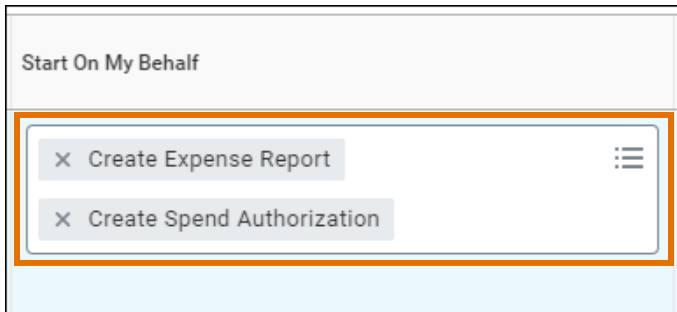
7. **Do Inbox Tasks On My Behalf** – Leave the **For all Business Processes** and **For Business Process** fields blank.

8. **Retain Access to Delegated Tasks in Inbox –** Leave this checkbox unselected.

NOTE	• Leave the **Delegation Rule** field blank. • The **Enter your comment** and **Attachments** fields are optional.

9. Click **Submit**. If you receive an alert, bypass this by clicking **Submit** again.

NOTE	The **Do Inbox Tasks on My Behalf** field can remain as **None of the above**. Delegation of your Inbox tasks is not needed to assign a delegate to create expense reports on your behalf.
	Also, you can assign a delegate to create expense reports on your behalf for longer than one year. However, inbox tasks cannot be delegated for over one year; therefore, **if you include inbox tasks in the assignment, it will be subjected to the one-year limitation and be routed for approval.**

You have successfully completed this task. Since you selected Create Expense Report only in the Start On My Behalf field, the assignment is immediate and does not require approval.

Please Note: If you have an existing HCM or Finance delegation, then Workday will still route this to approvers based on your existing delegation. You can complete the Mass Delegations Requests template and submit it to askfinance@virginia.edu to set up delegations that bypass approval.

Upload Receipts via Mobile App as a Delegate

As a delegate, you can upload receipts for another employee from the Workday mobile app. This can occur if you are delegated the create expense report task from the expense owner.

On the **Workday Mobile Application Home** page:

1. Type **Expenses** in the Search field.
2. Navigate to the **Tasks & Reports** tab of the search results.
3. Under Results, select **Expenses**.
4. Select **Scan Receipt**. Once uploaded, the receipt(s) will display in the Quick Expenses tab in the desktop version.
5. Go to Workday on your desktop and log into your account.

On the **Workday Home** screen:

6. Type **Edit My Expense Transactions** in the **Search** field and select the task.

NOTE	**Do not** Switch Account to your delegator as you **cannot** run the task logged in as them.

On the **Edit My Expense Transactions** screen:

7. In the **Quick Expenses** tab, navigate to the **Expense Payee** column.
8. Click the **Expense Payee** field and select the expense owner from the list. Now their name will replace yours.
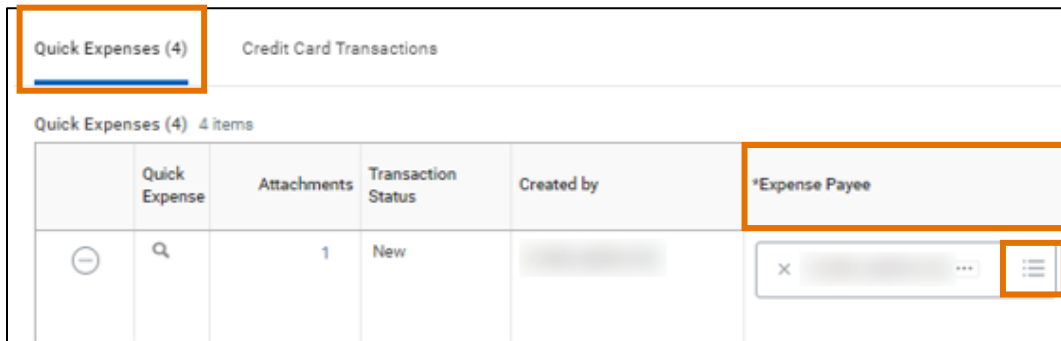
9. Click **OK**.

You have successfully completed this task. When you switch accounts to the expense owner you are a delegate for to create an expense report, the receipts will display under **Quick Expenses**. You can now select them for reimbursement or link them to a T&E card transaction as appropriate.
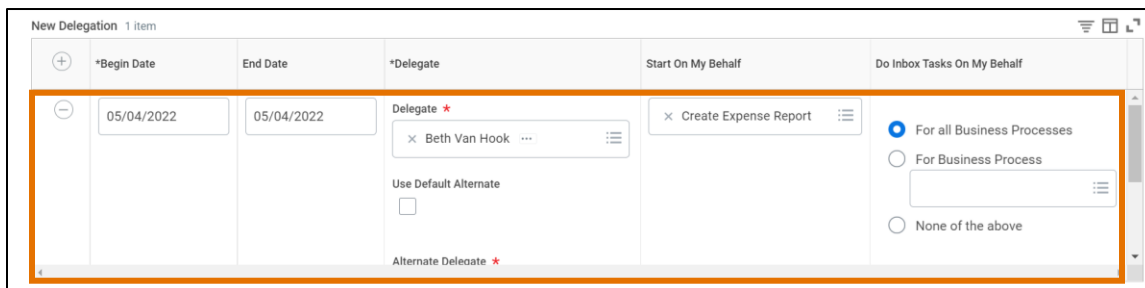
Access/Manage Existing Delegations

On the Workday **Home** screen:

1. Repeat Steps 1 – 3 in the **Set Up Delegations** section.

On the **Manage Delegations** screen:

2. If you have existing Delegates you would like to change, update the following fields:
   - **Begin Date** – if needed, change the existing start date of delegation
   - **End Date** – if needed, change the existing end date of delegation.
   - **Delegate** – click the **X** icon to remove the current delegate. Then enter and select the name of the employee you want to be your new delegate.
   - **Alternate Delegate** – confirm the alternate delegate is correct. If you need to change this existing alternate delegate, uncheck the **Use Default Alternate checkbox**. Then click the **X** icon to remove the alternate delegate and enter the name of the new alternate delegate.
   - **Start On My Behalf** – if needed, change the business process you want to delegate. Click the **X** icon to remove the business process and search for the new business process.
   - **Do Inbox Tasks On My Behalf** – if needed, change the specific business processes for which you want to delegate approval authority. Click the **X** icon to remove the business process and search for the new business process you want to delegate.

3. Click the **Submit** button at the bottom of the screen.

You have successfully completed this task.

NOTE	You can only update existing delegations that have been **approved**. Workday will not allow you to update any in-progress delegations that are routed for approval.

View My Delegations

The My Delegations report shows you the individuals you have assigned to act as a delegate on your behalf.

On the **Workday Home** screen:

1. Type **My Delegations** in the **Search** field and select **My Delegations**.

On **My Delegations** screen:

2. In the **Current Delegations** tab, your current delegates display.
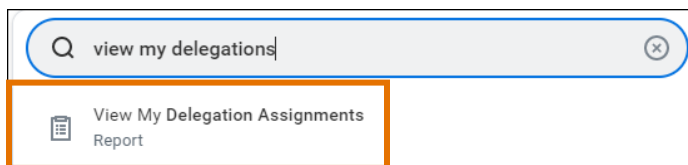

You have successfully completed this task.

View My Delegation Assignments

The View My Delegation Assignments report shows you the individuals you are acting as a delegate.

On the **Workday Home** screen:

1. Type **View My Delegations** in the **Search** field and select **View My Delegation Assignments**.

On **View My Delegation Assignments** screen:

2. Your current delegation assignments display.

You have successfully completed this task.

Access Delegated Tasks

On the Workday **Home** screen:

1. Select your Picture in the upper right-hand corner of the screen and select **Switch Accounts**.
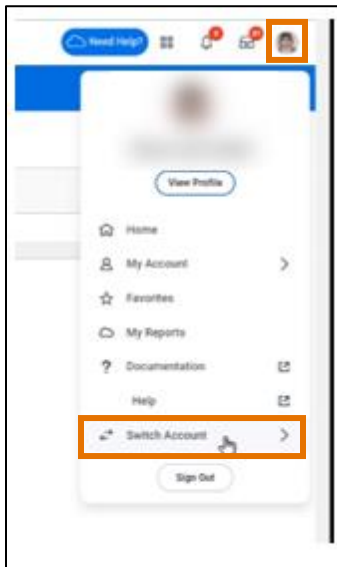
2. Under **Switch Account** select the **Name** of the profile for whom you are performing a delegated task.
3. Your **Delegation Dashboard** will appear, from there select which task you would like to initiate on behalf of the delegator. You can also navigate to the Workday Inbox to initiate the tasks delegated to you.
4. After performing or approving the delegated tasks, repeat Step 1 to switch back to your account.

You have successfully completed this task.

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## Set Up Email Delegations Notification

On the Workday **Home** screen:

1. Navigate to your Picture/Profile in the upper right-hand corner of the screen.
2. Select **My Account > Change Preferences**.
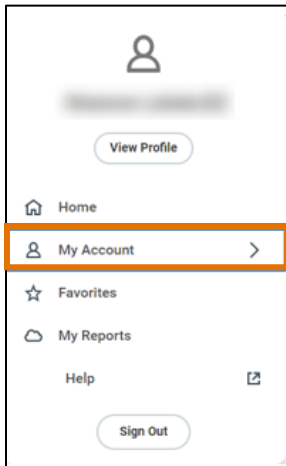
On the **Change Preferences** screen:

3. Scroll down to the **Channel** section and ensure the **Email** tab is selected. In the Channel section, you will see several notification types displayed.
4. Navigate to **Notification Type: Delegation Notifications**.
5. Click into the **Frequency** field and select **Immediately**. This indicates you will receive an email notification immediately after you are delegated a task that is approved and the assignment is or will be in effect.
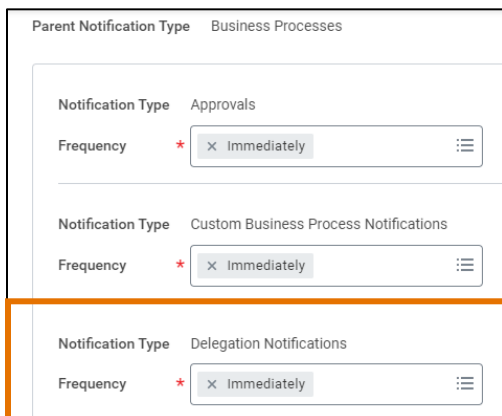
6. Click **OK**.

   You have successfully completed this task. The changes will be in effect for future delegation requests.