UVA FINANCE

Delegation Overview & Best Practices

UNIVERSITY of VIRGINIA

Delegation Overview & Best Practices

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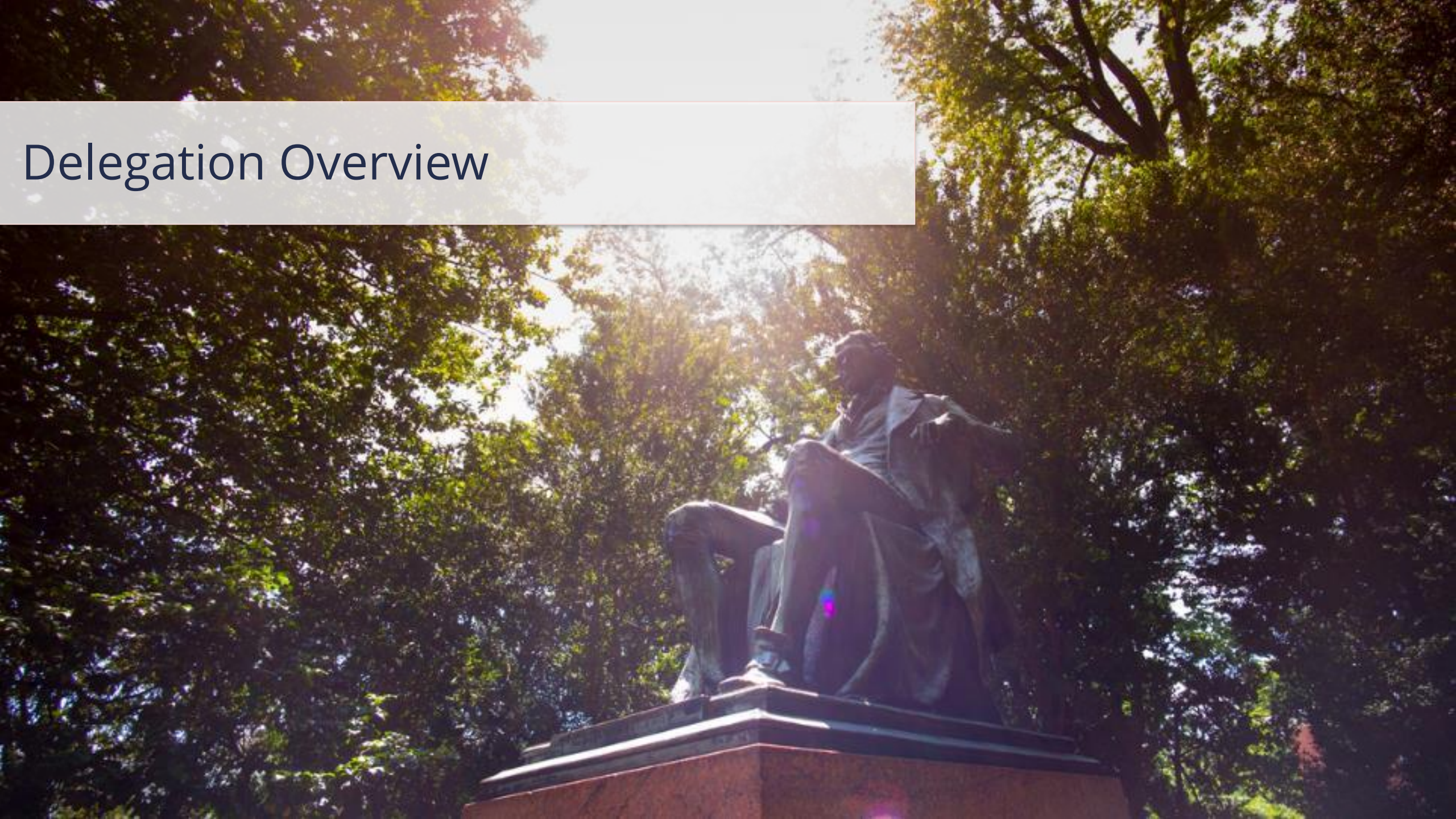
Delegation Overview



Delegation | Introduction – Frequently Asked Questions

What are delegations?

- Delegations are **temporary reassignments** of tasks to another person, enabling them to perform actions on your behalf. The delegation may pertain to initiating processes or approving transactions.

How do I set up delegations in Workday?

- Search **My Delegations** in the Workday search bar and select the task. On the My Delegations page, click the **Manage Delegations** button.

What reports can I run to see delegations?

- You can run **My Delegations** to view all your delegations or **View My Delegation Assignments** to see all your assignments as a delegate.

How long can I delegate expense reports for?

- 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**. All other delegations cannot exceed 1 year.

What is the difference between an alert versus an error?

- If you receive an **alert**, review and bypass the message by clicking submit. If you receive an **error**, review and revise the task in order to submit as it prevents you from completing the task.

Delegation | Introduction – Frequently Asked Questions

What are alternate delegates and how do they differ from delegates?

- A **delegate** is the individual you would like to start tasks on your behalf.
- 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.
- **For Example**: A delegate is assigned to approve expense reports. The delegate themself submits an expense report; the expense report will route to the **alternate delegate** for approval instead of the delegate.

What is the difference between Start On My Behalf vs Do Inbox Tasks On My Behalf?

- If want to delegate the **initiation of a task outside of your inbox** such as Create Expense Report, fill out the **Start On My Behalf** section.
- If you want to delegate **reviewing/approving a task from your inbox**, fill out the **Do Inbox Tasks On My Behalf** section. This section is commonly used for delegating approval in Workday.

Can I set up more than one delegate?

- You can add multiple employees to your delegation. To add another delegate, select the **existing delegate field** and type the additional delegate's name then press enter.

Can I assign tasks to different delegates?

- If you want to delegate multiple tasks to different employees, you can **assign each task** to a **different delegate**. To start, fill out the delegation section by identifying the delegate and selecting the specific task. Then select the **+ icon** to add another row and select the next delegate and the specific task you want them to do on your behalf.

Delegation | Work In Progress Items

The project team is working on solutions to address these areas.

Approvals: If there is an existing HCM/FIN delegation and you delegate an expense report, it will **require approval**.

- ✓ **Workaround:** You can fill out the Mass Delegations Requests Template and submit it to askfinance@virginia.edu to set up delegations for expense reports that bypass approval. You can find the template here: https://communityhub.virginia.edu/docs/DOC-4035.

Mass Upload Delegations: Individuals and MBUs **do not** have the ability to set up delegates for others, individually or in mass.

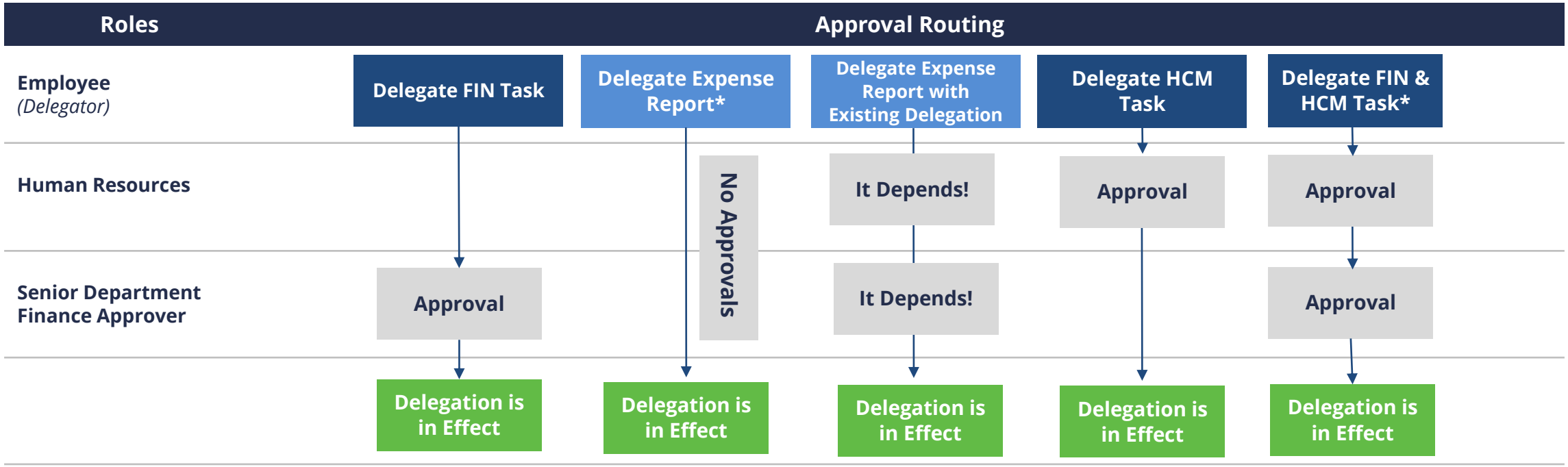
- ✓ **Workaround: Expense Data Entry Specialist** is a Workday security role that can create and submit expense reports on behalf of another employee and are typically held by Expense Ambassadors. You can reach out to your expense ambassador to submit an expense report on behalf of that employee. To find your expense ambassador, navigate here: https://uvafinance.virginia.edu/resources/how-can-i-find-my-expense-ambassador

Delegation Reports: Currently, reports **do not exist** in Workday to see who has a delegate set up and to view delegations for the entire cost center.

- ✓ **Workaround:** You can run reports such as My Delegations to view all your delegations or View My Delegation Assignments to see all your assignments as a delegate.

Delegation | Who Approves?

Below is the approval routing process once the initiator submits a delegation.



***Please Note:** If you are delegating an expense report and another task, it will route for approval. If you are just delegating an expense report, there are no approvals, and the assignment is immediate.*

***Please Note:** This includes For All Business Processes is checked under Inbox Task section.*

Delegation | If This, Then That - Initiation

IF THIS	THEN THAT
You have an upcoming short-term absence (PTO or leave) and want someone to do tasks on your behalf	Set up a delegate by searching My Delegations in Workday
Start On My Behalf: You want to delegate Expense Reports	• Select Create Expense Report in the Start On My Behalf field • Leave Do Inbox Tasks On My Behalf section blank • Will not route for approval and can be for > 1 year • If you have existing HCM/FIN delegation and adding expense report, it will route for approval
Inbox Tasks: You are an approver and want to delegate approving tasks from your inbox	• Under Do Inbox Tasks On My Behalf, select the specific task(s) in the Business Process field • Leave For all Business Processes blank • Select Retain Access to Delegated Tasks in Inbox checkbox

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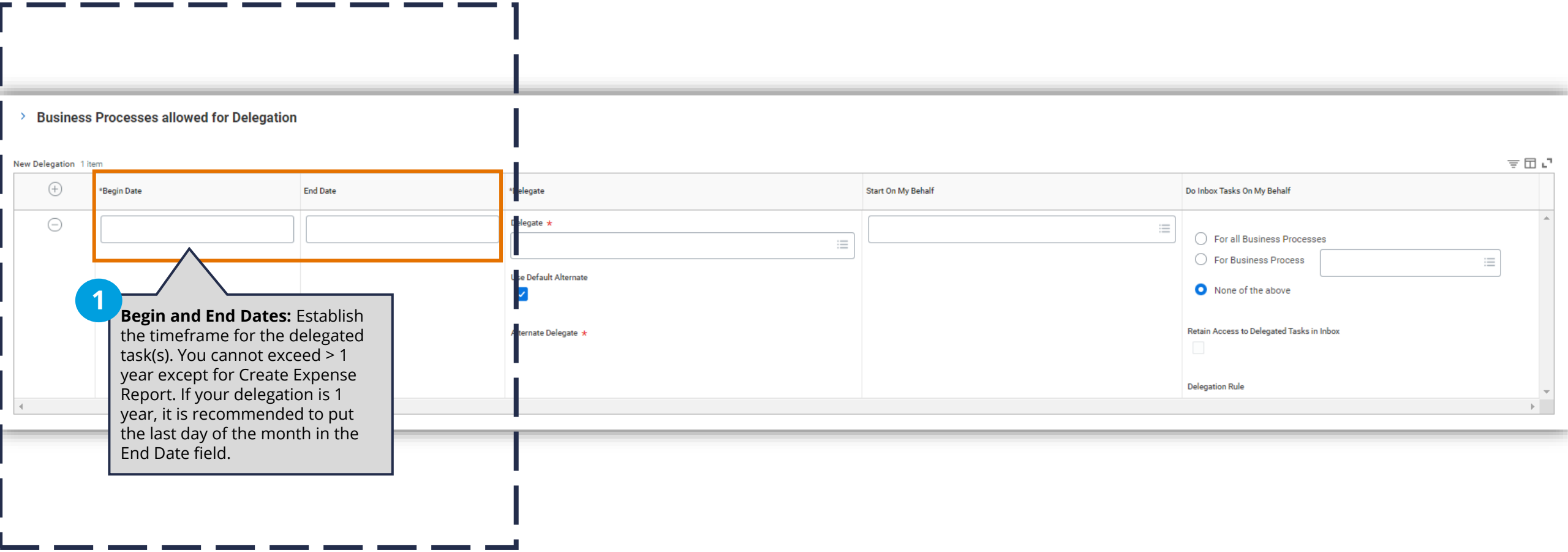
Delegation | If This, Then That - Approvals

IF THIS	THEN THAT
Delegation of a Finance related task (not expense reports)	• This will route to the Senior Department Finance Approver for approval • Delegation length cannot exceed 1 year
Delegation of a HCM (non-finance) related task	• It will route to HR for approval • Delegation length cannot exceed 1 year
You have existing finance delegation and want to delegate expense reports	This will route to Senior Department Finance Approver for approval
You have existing HCM delegation and want to delegate expense reports	This will route to HR for approval

Delegation | Set Up Delegations Overview

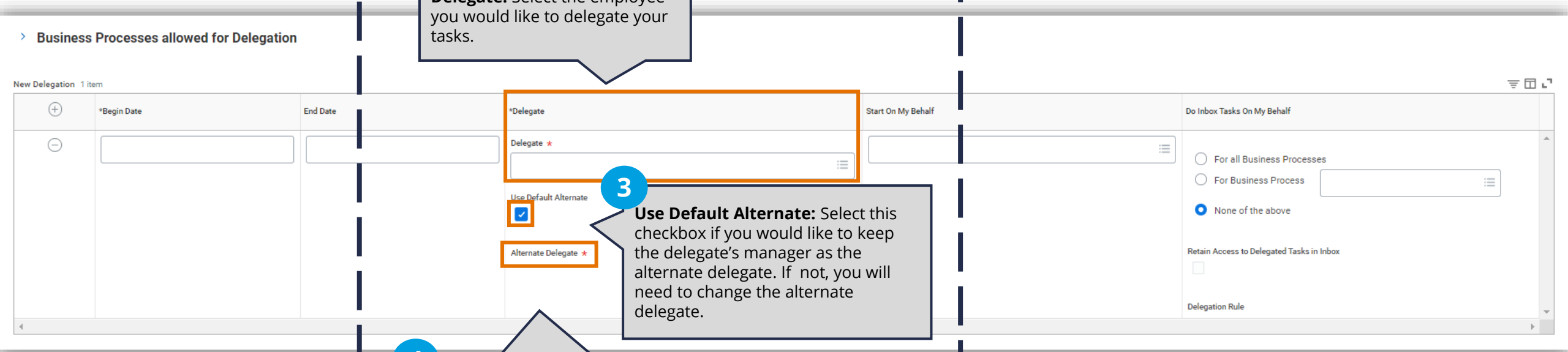
On the **Manage Delegations** screen:



1 **Begin and End Dates:** Establish the timeframe for the delegated task(s). You cannot exceed > 1 year except for Create Expense Report. If your delegation is 1 year, it is recommended to put the last day of the month in the End Date field.

Delegation | Set Up Delegations Overview

On the **Manage Delegations** screen:



2 **Delegate:** Select the employee you would like to delegate your tasks.

3 **Use Default Alternate:** Select this checkbox if you would like to keep the delegate's manager as the alternate delegate. If not, you will need to change the alternate delegate.

4 **Keep or Change Alternate Delegate:** This 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. **For Example:** A delegate is assigned to approve expense reports. The delegate themself submits an expense report; the expense report will route to the **alternate delegate** for approval instead of the delegate.

Delegation | Set Up Delegations Overview

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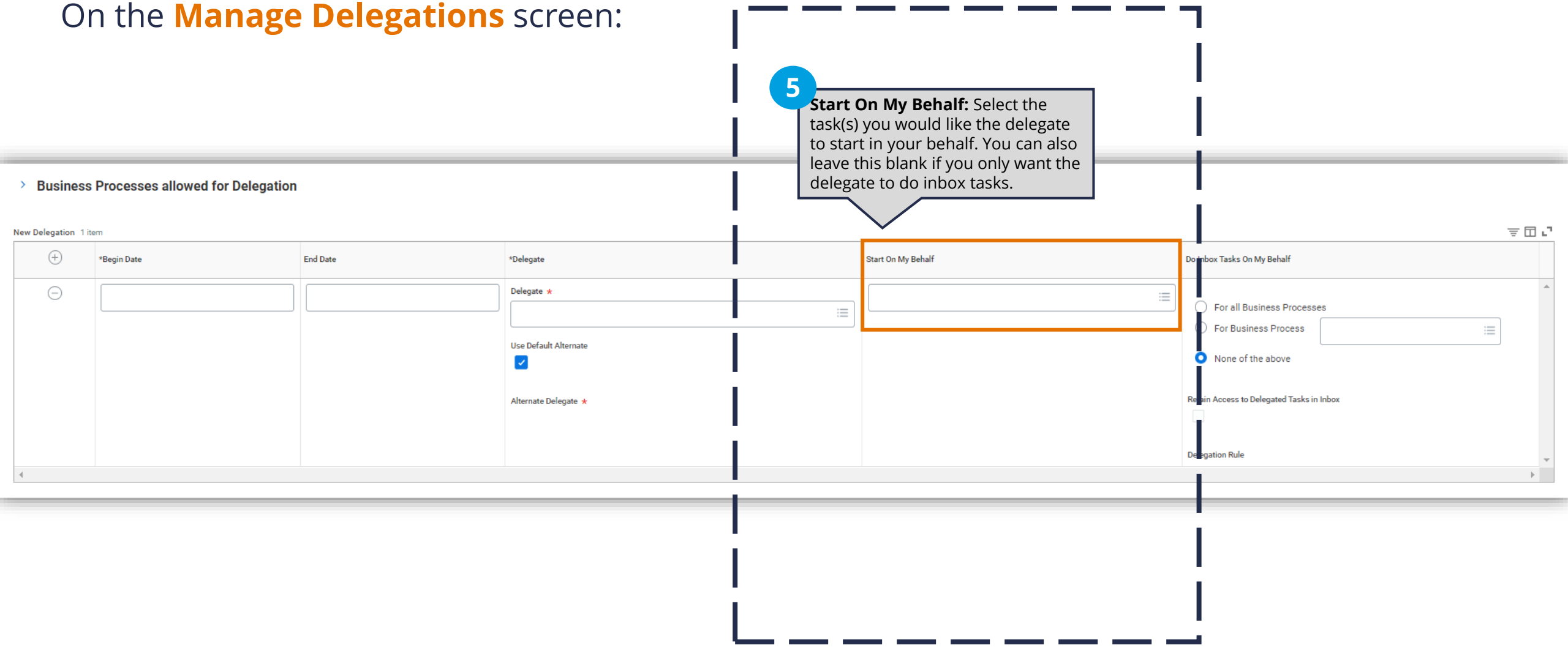

Delegation | Set Up Delegations Overview

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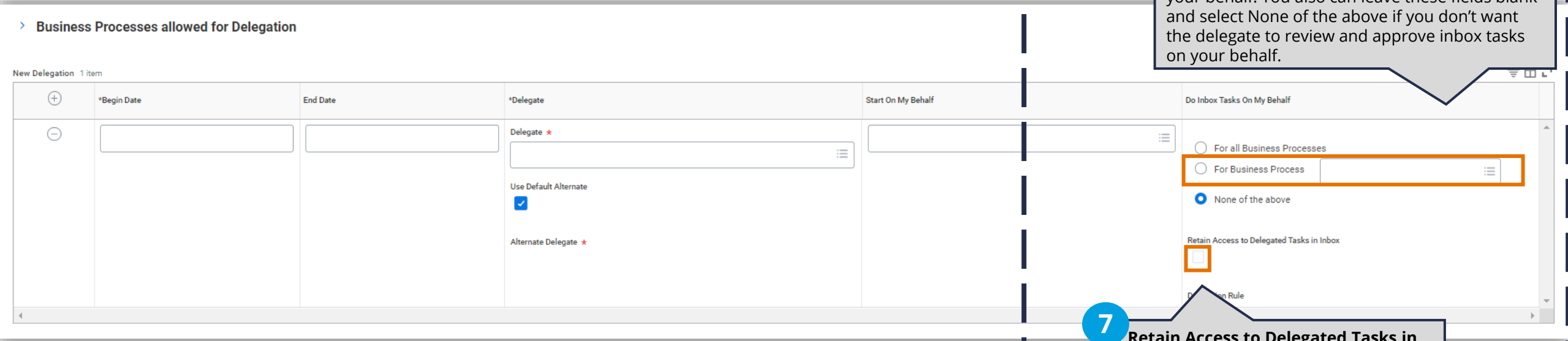
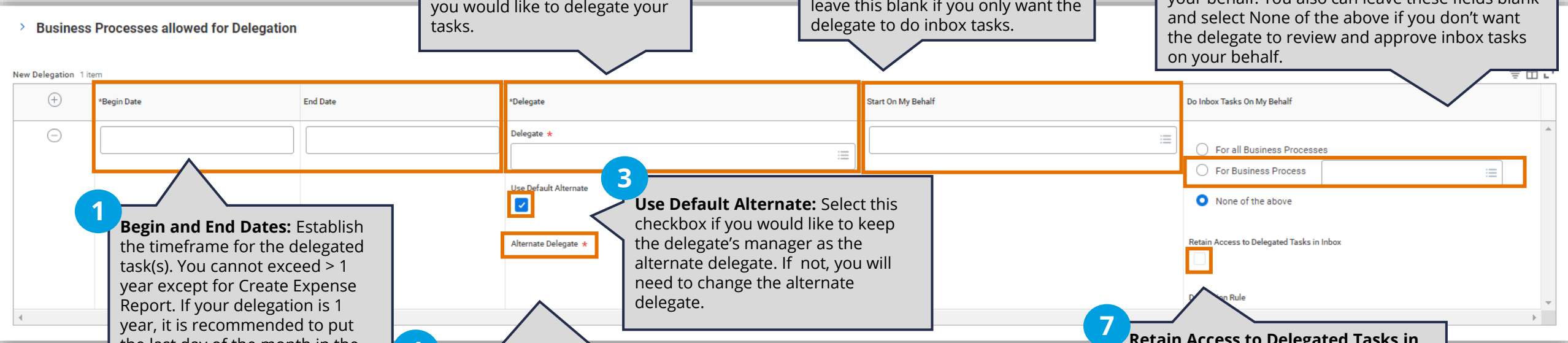


6 **Do Inbox Tasks On My Behalf:** Do not select For all Business Processes. Instead, select For Business Process and provide the task(s) you would like the delegate to review and approve on your behalf. You also can leave these fields blank and select None of the above if you don't want the delegate to review and approve inbox tasks on your behalf.

7 **Retain Access to Delegated Tasks in Inbox:** If you are selecting an inbox task, please make sure to select this checkbox. This indicates you still want the delegated inbox tasks to show in your inbox and still gives you the ability to review and approve them as well.

Delegation | Set Up Delegations Overview

On the **Manage Delegations** screen:



1 **Begin and End Dates:** Establish the timeframe for the delegated task(s). You cannot exceed > 1 year except for Create Expense Report. If your delegation is 1 year, it is recommended to put the last day of the month in the End Date field.

2 **Delegate:** Select the employee you would like to delegate your tasks.

3 **Use Default Alternate:** Select this checkbox if you would like to keep the delegate's manager as the alternate delegate. If not, you will need to change the alternate delegate.

4 **Keep or Change Alternate Delegate:** This 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. **For Example:** A delegate is assigned to approve expense reports. The delegate themself submits an expense report; the expense report will route to the **alternate delegate** for approval instead of the delegate.

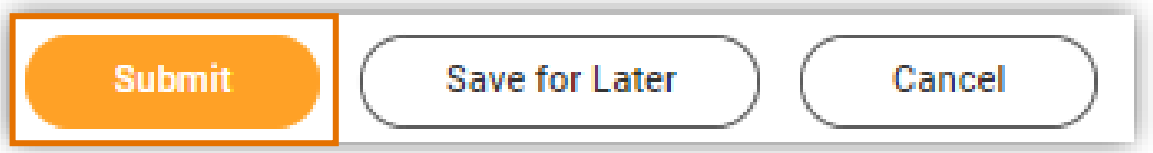
5 **Start On My Behalf:** Select the task(s) you would like the delegate to start in your behalf. You can also leave this blank if you only want the delegate to do inbox tasks.

6 **Do Inbox Tasks On My Behalf:** Do not select For all Business Processes. Instead, select For Business Process and provide the task(s) you would like the delegate to review and approve on your behalf. You also can leave these fields blank and select None of the above if you don't want the delegate to review and approve inbox tasks on your behalf.

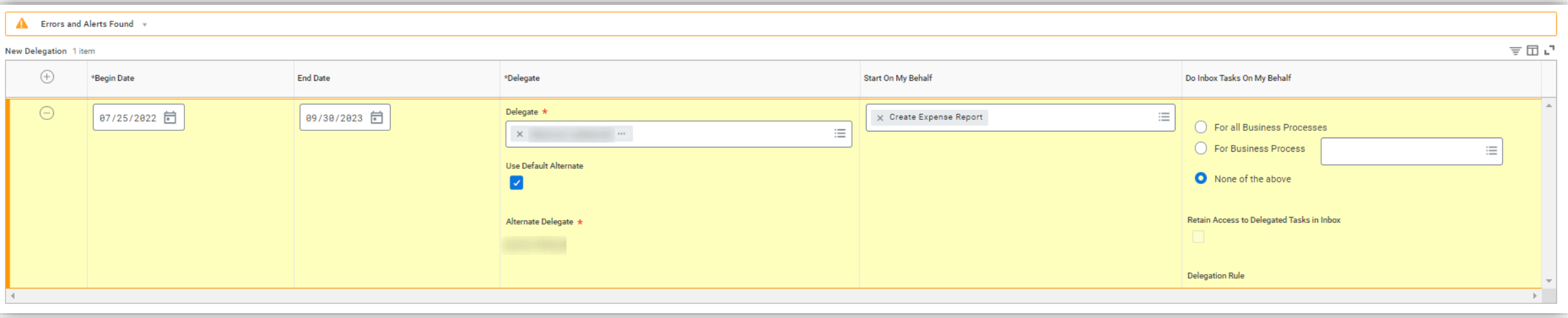
7 **Retain Access to Delegated Tasks in Inbox:** If you are selecting an inbox task, please make sure to select this checkbox. This indicates you still want the delegated inbox tasks to show in your inbox and still gives you the ability to review and approve them as well.

Delegation | Set Up Delegations Overview

8 After completing the steps, click **Submit**.



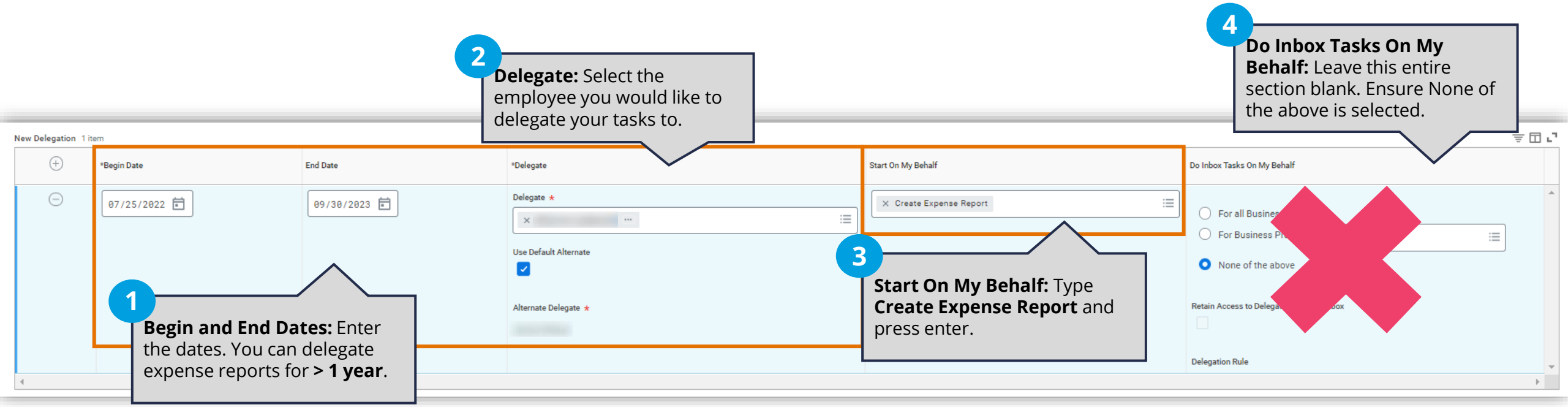
📣 **Please Note:** After clicking **Submit**, you may receive an alert message. This is a message that this will give the delegate access to all your previously created items of that type. To bypass this alert, click Submit **again**.



Scenarios

Delegation | Scenario 1: Delegate Expense Report

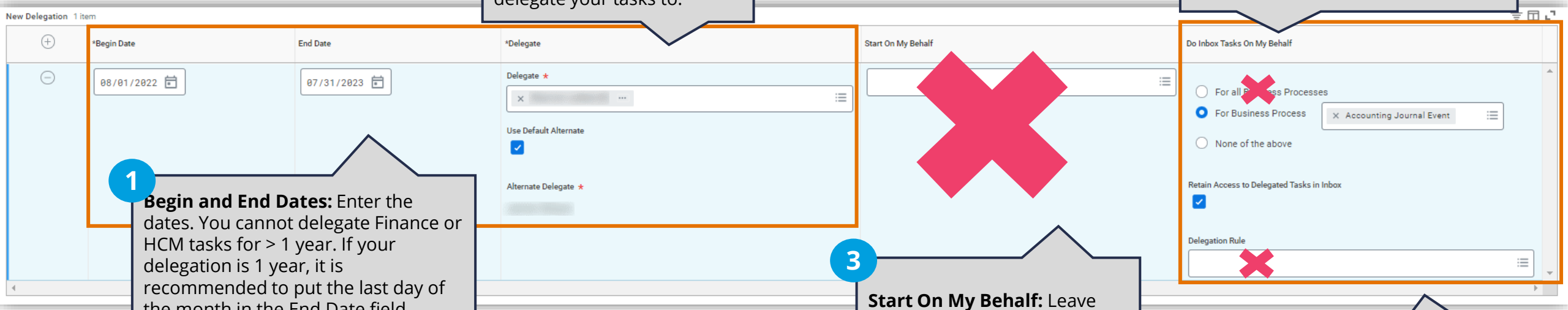
If you want to delegate **expense reports**, please follow the steps below:



5 Once finished, click the **Submit** button. If you do not have any existing delegations, this will not route for approval.

Delegation | Scenario 2: Delegate FIN Inbox Task

As an approver, if you want to delegate reviewing and approving **finance inbox tasks**, please follow the steps below:



1 **Begin and End Dates:** Enter the dates. You cannot delegate Finance or HCM tasks for > 1 year. If your delegation is 1 year, it is recommended to put the last day of the month in the End Date field.

2 **Delegate:** Select the employee you would like to delegate your tasks to.

3 **Start On My Behalf:** Leave this field blank.

4 **Do Inbox Tasks On My Behalf:** Select **For Business Process** and type the task. You can also select the **All** category for the entire list.

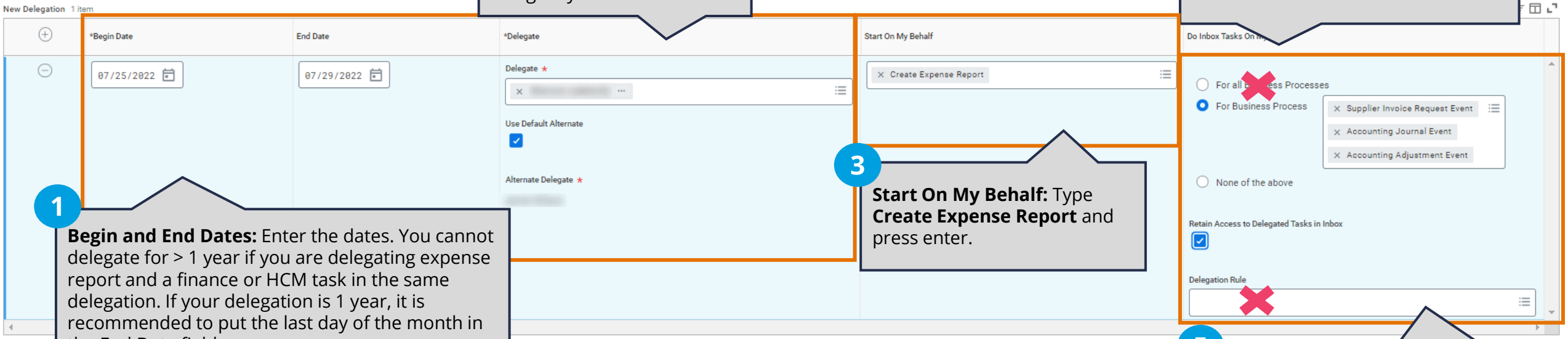
5 **Retain Access to Delegated Tasks in Inbox:** Select this **checkbox**.

Delegation Rule: Leave this field **blank**.

6 Once finished, click the **Submit** button. This will route to the Senior Department Finance Approver for approval.

Delegation | Scenario 3: Delegate Expense Report & FIN Inbox Task

If you want to delegate an **expense report** and a **finance inbox task**, please follow the steps below:



1 **Begin and End Dates:** Enter the dates. You cannot delegate for > 1 year if you are delegating expense report and a finance or HCM task in the same delegation. If your delegation is 1 year, it is recommended to put the last day of the month in the End Date field.

2 **Delegate:** Select the employee you would like to delegate your tasks to.

3 **Start On My Behalf:** Type **Create Expense Report** and press enter.

4 **Do Inbox Tasks On My Behalf:** Select **For Business Process** and type the task(s). You can also select the **All** category for the entire list.

5 **Retain Access to Delegated Tasks in Inbox:** Select this **checkbox**.

Delegation Rule: Leave this field **blank**.

6 Once finished, click the **Submit** button. This will route to the Senior Department Finance Approver for approval.

Thank you!