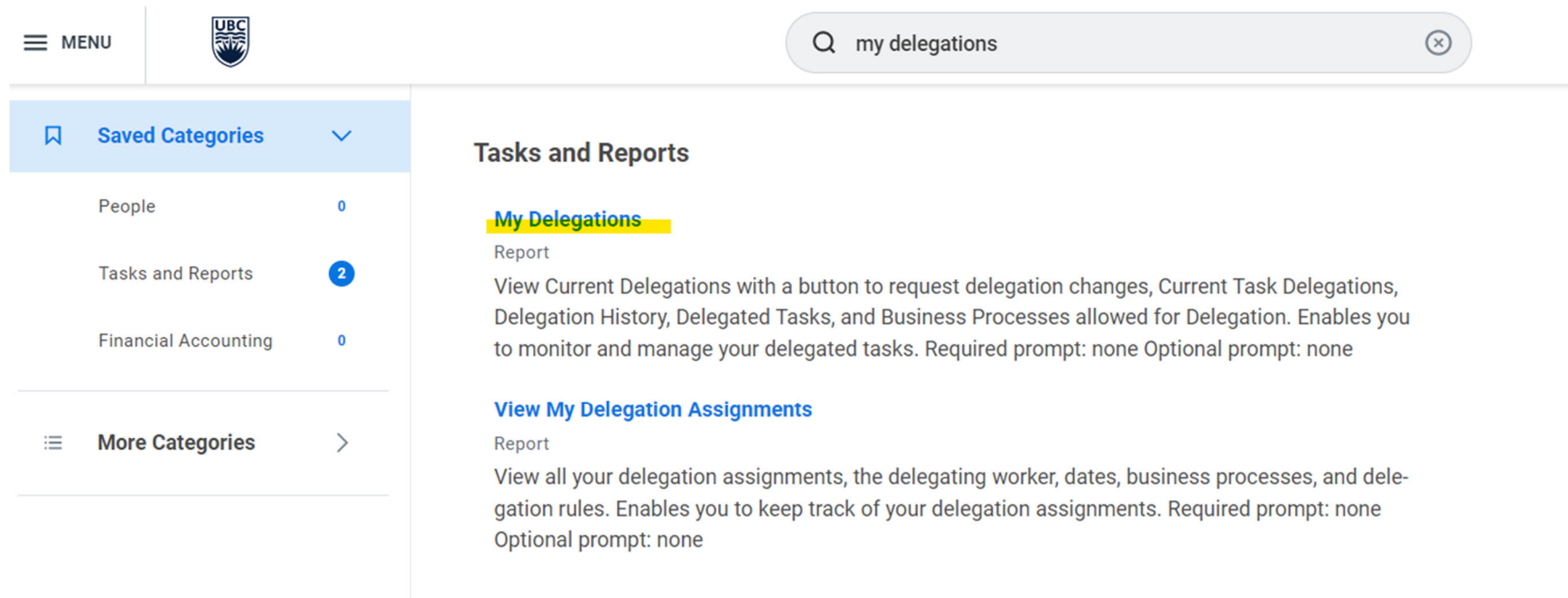


## Basic WorkDay Delegations for UBC Law Faculty, Managers and Staff

- Create Expense report (UBC Law finance team enable to initiate a reimbursement on your behalf)

### Steps

- 1) WorkDay log-in, go to search bar on top - type in “my delegations”



- 2) Click (select) “My Delegations”
- 3) At the landing page, click on “manage delegations” and complete the steps as shown below (screenshots)
  - a. Delegation pf “Create Expense Report” to current Allard finance staff:
    - i. Daniel Johnston
    - ii. Lilyana Lulcheva
    - iii. Monzur Siddique



## My Delegations

For (your name will show up here)

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
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No items available.

Manage Delegations

### > Business Processes allowed for Delegation

New Delegation 1 item



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

New Delegation 1 item

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
<div> <div>+</div> <div>-</div> </div>	<div>2023-01-27</div> <div>📅</div>	<div>YYYY-MM-DD</div> <div>📅</div>	<div> <div>Delegate *</div> <div> <div>✕ Daniel Johnstone ...</div> <div>✕ Lilyana Lulcheva ...</div> <div>✕ Monzur Siddique (On Leave) ...</div> </div> <div> <div>Use Default Alternate</div> <div><input checked="" type="checkbox"/></div> </div> <div> <div>Alternate Delegate *</div> <div>Debbie Cua</div> </div> </div>	<div> <div>✕ Create Expense Report</div> <div>⋮</div> </div>	<div> <div> <div><input type="radio"/> For all Business Processes</div> <div><input type="radio"/> For Business Process</div> <div> <input type="text"/> <div>⋮</div> </div> </div> <div> <div><input checked="" type="radio"/> None of the above</div> </div> <div> <div>Retain Access to Delegated Tasks in Inbox</div> <div><input type="checkbox"/></div> </div> <div> <div>Delegation Rule</div> <div>▼</div> </div> </div>

☁

Attachments

Drop files here

or

Select files

Submit

Save for Later

Cancel

- Begin date would always be the current date
- Click submit (2x) to save and activate the delegations completed
  - A yellow alert will pop-up, this message to inform you the delegation will allow the finance staff to see all prior expense (payment) transactions