

Basic Workday Delegations for UBC Law Faculty and Staff

Last updated: May 2021

Setup delegations to:

- Create Expense report (so Dan, May or Monzur can initiate a reimbursement on your behalf)
- Expense report event (for finance review/validation on expense reports created)

Please make sure the delegations are set-up per screenshot provided below, do not merge these in one single delegation action.
This would also enable removal of specific delegations if there are changes in finance processes.

1. Login to Workday. In the search bar at the top, search for “my delegations”



Search Results

Categories

- Common
- Assets
- Banking
- Drive

Search Results 3 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...

2. Click on *my delegations*
3. On the landing page, click on “manage delegations”

Manage Delegations

4. Click on (+) sign (on the top header besides “Begin Date”) to add a new delegation rule

> **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 type="text"/> <input checked="" type="radio"/> None of the above <input type="checkbox"/> Retain Access to Delegated Tasks in Inbox Delegation Rule

1. Create Expense Report Delegation

> Business Processes allowed for Delegation

New Delegation 1 item

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
	2021-03-16	YYYY-MM-DD	<p>Delegate *</p> <ul style="list-style-type: none">May VillacampaMonzur SiddiqueDaniel Johnstone <p>Use Default Alternate <input checked="" type="checkbox"/></p> <p>Alternate Delegate *</p>	<ul style="list-style-type: none">Create Expense Report	<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> <p>Delegation Rule</p>

- *Begin date* should always be set to the current date
- In the *delegate* field, add May Villacampa, Monzur Siddique and Daniel Johnston.
- In the *start on my behalf* field, add “create expense report”.
- In the *do inbox tasks on my behalf*, select “none of the above”

2. Create Expense Report Event Delegation

For Faculty

> Business Processes allowed for Delegation

New Delegation 1 Item

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
	2021-05-20	YYYY-MM-DD	<p>Delegate *</p> <p>Saker Hirani</p> <p>Use Default Alternate</p> <input checked="" type="checkbox"/>		<p>For all Business Processes</p> <p><input checked="" type="radio"/> For Business Process</p> <p>Expense Report Event</p> <p>None of the above</p> <p>Retain Access to Delegated Tasks in Inbox</p> <input checked="" type="checkbox"/>

- *Begin date* should always be set to the current date
- In the *delegate* field, add Saker Hirani
- In the *do inbox tasks on my behalf*, select “for business process” and enter “expense report event”
- Ensure “use default alternate” and “retain access to delegated tasks in inbox” are checked

For Managers and Staff

> Business Processes allowed for Delegation

New Delegation 1 item

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
	2021-05-20	YYYY-MM-DD	<p>Delegate *</p> <p>Debbie Cua</p> <p>Use Default Alternate</p> <input checked="" type="checkbox"/>		<p><input type="radio"/> For all Business Processes</p> <p><input checked="" type="radio"/> For Business Process</p> <p>Expense Report Event</p> <p><input type="radio"/> None of the above</p> <p>Retain Access to Delegated Tasks in Inbox</p> <input checked="" type="checkbox"/>

- *Begin date* should always be set to the current date
- In the *delegate* field, add Debbie Cua
- In the *do inbox tasks on my behalf*, select “for business process” and enter “expense report event”
- Ensure “use default alternate” and “retain access to delegated tasks in inbox” are checked

Save Delegations

Click submit (2x) to save and activate the delegations

Please note that Debbie Cua will show up as alternate delegate in some of the delegation lines – it is not evident in the screenshot below as screenshot was captured using Debbie’s WD access for the screenshot