

## Workday Delegations Policy

### **Applicability**

Delegation enables employees to perform tasks on behalf of the original task owner for a period of time. Delegation doesn't remove responsibility (ownership) for the task from the original task owner and, when the delegation period ends, any incomplete delegated tasks revert to the original owner. Tasks and other inbox items may only be delegated in accordance with this policy.

### **Purpose**

This policy explains which Workday business processes may be delegated, how and to whom. It is not the intent of this policy to change approval levels or requirements.

### **Policy**

- **Standard delegations within an employee's supervisory organization**
    - An employee may delegate business processes, for example, Correct Time Off, Enter Time, Request Time Off, Request One-Time Payment, etc, to another employee within their supervisory organization.
    - Requests for delegations within an employee's supervisory organization can be made in Workday. A step-by-step [job aid](#) is available on the [Workday resource web site](#).
    - The employee's manager is responsible for reviewing, determining if that delegation is appropriate and approving all delegation requests.
  
  - **Cross-supervisory delegations outside of an employee's supervisory organization.**
    - A limited set of business processes are eligible for cross-supervisory delegations and can be requested by the leadership of a department for their staff to be supported by shared departmental assistants or support staff. Requests can be submitted during twice-yearly windows or when there is staff turnover.
    - Requests can be made through the [Request Form](#).
    - Initiation of the following business processes is eligible for cross-supervisory delegation and can be requested by:
      - Staff Department heads for their staff to be supported by shared departmental assistants or support staff.
      - Vice Provost designees for Department Chairs or Program Directors to be supported by Administrative Assistants or Program Coordinators.
- These business processes are below:
- Verify Procurement Card Transaction
  - Create Expense Report
  - Create Receipt
  - Request One-Time Payment

- Approval of the following business processes is eligible for cross-supervisory delegation and can be requested by:
  - Undergraduate Chairs for their Associate Dean.
  - Graduate Program Directors for the designated point of contact.

These business processes are below:

- Ad Hoc Payment
  - Create Expense Report
  - Verify Procurement Card Transaction
  - Purchase Order
  - Create Requisition
  - Supplier Invoice Request
  - Supplier Invoice
  - Spend Authorization
  - Change Order
  - Customer Invoice
  - Create One-Time Payment
  - Create Request (Semester-Based Pay)
- A Workday Business Process Administrator may create, review, cancel or modify a delegation as necessary to comply with the policy and to address delegation requests from the authorized person(s) at the College for unplanned departures, leaves of absences, etc.
  - The following standards should be applied when considering if a delegation should be approved:
    - The delegation should be made on a temporary basis and have an end date of no longer than one year.
    - Requests for delegations must specify the business process that the delegate is allowed to initiate and approve.
      - Requests cannot allow a delegate to have access to all inbox items.
    - Active delegations should be reviewed and recertified on an annual basis to ensure that they are still appropriate.
    - Enacting a delegation allows the delegate to **complete tasks on behalf** of the delegator. The delegator will not be able to review or approve transactions submitted by the delegate.