Delegating when you are Out of the Office

Date: October 24, 2017

Topic/Function: Delegating Approvals when you are Out of the Office

Audience:
- All employees

Descriptions:
Workday’s automatic routing of Business Processes is efficient because it ensures the right people are approving transactions in a timely manner. However, when a BP automatically routes to someone who is on leave or unable to log into Workday, the result can be delays in completing the processes. When you are out of the office or anticipate being unable to log on to Workday for an extended period, you should delegate your approvals to an appropriate representative. Tasks to be delegated, and to whom, should be discussed with your supervisor.

Delegation temporarily reassigns tasks/approvals to a delegate. The delegate may perform individual actions on behalf of the delegator for an assigned period of time. Delegation does not remove responsibility (ownership) for the task/approval from the delegator. When the delegation period ends, any incomplete delegated tasks revert to the delegator (original owner).

The Delegation Job Aid will walk you through step by step how to set up delegations.

Redundancy in Initiating Tasks

Workday is configured to allow the manager and the departmental support staff to initiate transactions. This eliminates the need to delegate the initiation of transactions. Administrative Assistants can assist managers with personnel transactions and Finance Administrative Assistants can initiate purchases, expense, and PCard transactions on behalf of users.

Delegation Review

Please inform your supervisor of tasks/transactions that you are planning on delegating and to whom will be allowed to act on your behalf. Additional guidance on the use of delegation will be provided in the coming months.

If you have any questions, submit a Workday Help Desk Ticket or contact the Workday Help Desk at 775-784-6086.