CBSHS Workday Delegation Guidelines

Workday allows users to delegate specific tasks and approvals to other employees. While this functionality can be a valuable solution in certain situations, delegations should be used thoughtfully and only when appropriate. The following guidance outlines appropriate uses and best practices for Workday delegations. We recognize that there may be unique situations that require delegations outside of these guidelines. In these circumstances, please reach out to Stefan Bock (sbock@clemson.edu) before initiating the delegation. If you are requested to be a delegate and are unsure if it is appropriate, please contact your supervisor for guidance.

CBSHS Expectations

Temporary/Out-of-Office Situations

Delegation is appropriate when an employee will be temporarily out of the office, and certain tasks or approvals need to continue during their absence.

When establishing a temporary delegation:

1. Select a delegate who is familiar with the tasks being delegated and has an appropriate or similar security role/access in Workday.
2. Use Workday's date-range functionality to ensure the delegation is active only for the period you will be out of the office.
3. Delegate only the specific business processes necessary to keep work moving during your absence rather than broadly delegating all available processes.

P-Card Holders

P-Card holders can delegate appropriate Workday processes to their P-Card Liaison when assistance is needed. The expectation remains that the cardholder is responsible for uploading receipts and providing the required documentation for their transactions. Delegation should primarily be used to allow the P-Card Liaison to review transactions and provide assistance with unique circumstances; it does not transfer the cardholder's responsibility or accountability to the liaison.

Spend Authorizations and Expense Reports

To assist with questions and troubleshoot issues, the departmental Accounts Payable position can be added as a delegate for these tasks. Employees are still expected to create their own Spend Authorizations and Expense Reports, enter the appropriate information and upload any required supporting documentation.

Managers, Unit Leads, and Principal Investigators (PIs)

It is expected that managers, unit leads, and Principal Investigators review and approve tasks for which they have approval responsibility. This includes:

1. Direct-report employee timecards
2. Leave requests
3. Budget and financial approvals
4. Other transactions requiring approval based on your assigned role

Best Practices

Faculty and staff should adhere to these best practices when utilizing Workday's delegation features.

1. Use delegation to ensure work continues. Limiting delegations to only necessary tasks helps prevent confusion and avoids overloading colleagues.

2. When establishing a delegation, confirm with that colleague that they understand the responsibility you have asked them to perform and that they are willing to manage that responsibility.

3. Delegating tasks should be done with thoughtful consideration and care. Delegating a task does not remove an individual's accountability for the action and data involved.

Resources and Tips

The Workday Training website contains useful guides related to delegation.

1. Delegations must have a defined start and end date and can only be established for no longer than 180 days. If a delegation is still necessary after 180 days, it must be renewed.

2. A delegate cannot take action on tasks that were already pending prior to the delegation's effective date. Please address any pending tasks before initiating a delegation.

Thank you for your attention to these guidelines and for helping ensure Workday delegations are used appropriately!