

Policy Title:	Workday Approval and Task Delegation
---------------	--------------------------------------

Policy Number:	FAD.089
----------------	---------

Date Approved:	
----------------	--

### A. Description

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.

### B. Definition(s)

**Delegator:** An employee and approved Workday user who wishes to assign tasks normally assigned to themselves to other personnel. The Delegator is typically but not limited to an employee with approval responsibilities.

**Delegate:** A non-student employee and Workday user who is assigned (approval) tasks by a Delegator.

**Security Administrator:** The security administrator is a role within Workday performed by the Enterprise Information Systems team within SOU's Information Technology Department.

### C. Policy Statement

1. Delegator may delegate certain Workday business process items to another Delegate as permitted by this policy.
2. The Security Administrator, Controller, Human Resources, and Information Technology may create, review, cancel or modify a delegation as necessary to comply with policy and its relevant procedures.
3. Delegator may delegate the "creation of tasks" to Delegate within the employees' supervisory organization.
4. The approval of "inbox items," such as leave approval, expense reports, and spend authorizations, may only be delegated as follows:
  - a. The delegation must be made on a temporary basis and have an end date and be no longer than one year.
  - b. The Delegator should be in a position of equal or higher authority than the Delegate.
  - c. University executive and director level leadership may assign Delegates reporting directly to them and for periods of longer than one year.
5. A Delegator may delegate business processes, for example, Correct Time Off, Enter Time, Request Time Off, Request One-Time Payment, etc., to a Delegate within their supervisory organization.
6. Delegator may request cross-supervisory delegations outside of Delegator's supervisory organization by special request approved by the executive(s) overseeing the supervisory organization(s) for:
  - a. Verify Procurement Card Transaction

- b. Create Expense Report
- c. Create Receipt

This policy may be revised at any time without notice. All revisions supersede prior policy and are effective immediately upon approval.

#### D. Relevant Authority

SOU Information Security Manager, SOU Records Custodians, Business Affairs Council

#### E. Other Information

It is not the intent of this policy to change approval levels or requirements defined in other SOU Policies, such as Policy FAD.057 Procurement and Contracting Code, FAD.058 Purchasing and Contracts for Personal or Professional Services and Goods and Services, FAD.078 Policy on Signature Authority.

The Policy Contact, defined above, will write and maintain the procedures related to this policy and these procedures will be made available within the Custodial Office.