



THE UNIVERSITY of  
NEW ORLEANS

**ADMINISTERED BY: Office of the Vice  
President for Business Affairs**

**Policy No:** AP-BA-61.1  
**TITLE:** Delegations and Approvals in  
Workday  
**EFFECTIVE DATE:** January 4, 2021  
**CANCELLATION:**  
**REVIEW DATE:** Spring 2024

#### **PURPOSE**

To define appropriate use of the delegation and approval functions in the Workday system.

#### **AUTHORITY**

*Part Two, Chapter III, Section IV of the Bylaws and Rules of the University of Louisiana System.*

#### **GENERAL POLICY**

Workday, the University's ERP for Human Resources and Financial Management, allows users to delegate tasks to others and approve actions. This policy explains which Workday business process items, such as tasks and other inbox items, may be delegated and to whom.

#### **PROCEDURE**

1. An approved Workday user may delegate certain Workday business process items to another user as permitted in this policy.
2. The user's manager, or a higher-level supervisor in the organizational hierarchy, must review and approve delegation requests.
3. A Workday Security Administrator may create, review, cancel, or modify a delegation as necessary to comply with policy.
4. A user may delegate the creation and/or approval of tasks to another user at a superior, subordinate, or peer level within the organization.
5. An employee or delegate shall not approve actions or tasks on themselves.
6. The "Retain Access to Delegated Tasks in Inbox" box should be checked for all delegations.
7. 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.

- b. The delegation shall not extend beyond one year, but may be renewed with approval.
  - c. A UNO Cabinet Member who is on leave may delegate the approval of spend authorizations or expense reports to a direct report at the Associate Vice President level or higher.
8. It is not the intent of this policy to change approval levels or requirements defined in other UNO policies.



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