Delegation and Approvals in Workday

Workday allows for the delegation of duties in a couple different ways. One role is a long-term solution for staff who always prepare expenses on behalf of others, such as Faculty Support Coordinators. The other is for short-term out of office, or sick leave scenarios.

“Expense Preparer” - This role enables a staff member to prepare Spend Authorizations and/or Expense Reports for faculty, staff, students, and non-employees for as long as they have that role. There are over 700 users across campus with the Expense Preparer Role. If you have someone helping to prepare expenses today, that same person should have that capability in Workday.

“Delegation” – This role enables a person to assign a delegate to approve and/or process various financial transactions if they are out of the office for vacation, sick leave, etc. Georgia Tech has established a policy limiting delegation to a maximum of 30 days—exceptions may be made for extenuating circumstances. There must be a start and an end date when assigning a delegate.

Approvals – All transactions will require a minimum of two approvals, just as they do today. Each unit has mapped roles which determine who conducts the approvals on various transactions (e.g. requisitions, expense reports, etc.). In many cases, academic and research units have mapped Faculty Support Coordinators to these roles. This will allow FSCs to manage procurement and expense processes. If you have questions specific to your unit, please reach out to your unit’s Financial Team.

As a reminder, all faculty are still expected to approve their subordinates’ travel expenditures, and any spend authorizations (travel approvals) or expense reports filed on their behalf - as done today.