Workday

Delegation

What is delegation?

- Delegation temporarily allows others to perform tasks or start processes on your behalf.

When should I use delegation?

- Delegation is for short-term coverage when there is not already someone who has appropriate security to perform the actions.

How do I set up delegations in Workday?

- Search My Delegations in the search bar and select the task, then click the Manage Delegations button on the My Delegations page.
- Click the gear icon on a task in your My Tasks to delegate a single task.

Can I set up more than one delegate?

- You can have up to 5 delegates.

Can I set up multiple delegations to different delegates?

- You can delegate multiple tasks to different delegates by using the <u>+ icon</u> on the My Delegations page.

What is the difference between Start on My Behalf and Do Inbox Tasks on My Behalf?

- <u>Start on My Behalf</u> delegates the initiation task of a business process.
- <u>Do Inbox Tasks on My Behalf</u> delegates ability to perform tasks, including approvals, on your behalf.

Who can be a delegate?

- <u>Peers</u> – people who report to the same supervisor as you within your supervisory organization.

- <u>Subordinates</u> – people who report to you or report to your peers.

- <u>Superiors</u> – your supervisor or your supervisor's supervisor.

How do I delegate to employees outside of my supervisory organization?

- Your manager or a delegation manager can delegate to employees outside your supervisory organization on your behalf.

What are alternate delegates and how are they different from delegates?

A delegate is the individual you would like to perform tasks or start processes on your behalf.

An alternate delegate is where a task will route if the delegate themselves cannot perform the task due to business rules (e.g., a delegate cannot approve their own expense reports).

How long can I set up delegations for?

Delegations can be a maximum duration of 90 days.

What reports can I run to see my delegations?

My Delegations – Items you have delegated to others.

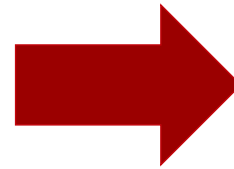View My Delegation Assignments - Business process delegations with you are the delegate or alternate delegate.

View All Delegated Tasks – Individual tasks delegated to you.

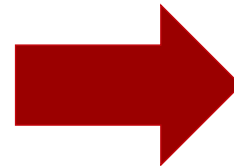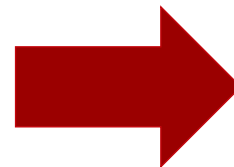# Delegation | If This, Then That

- ## If This

Then That

You have an upcoming short-term leave and want someone in your unit to do tasks on your behalf	Set up a delegation by searching My Delegations or click the Manage Delegations icon in My Tasks
You want someone in your area to perform a single task on your behalf	Set up a single task delegation by clicking the gear icon in the task window
You want to delegate to someone outside your supervisory organization	Ask your Manager or your local Delegation Manager to delegate on your behalf

How to Set Up a Delegation

On the **Manage Delegations** page:

> **Business Processes allowed for Delegation**

New Delegation 1 item

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do My Tasks On My Behalf
⊕ ⊖			Delegate *		○ For all Business Processes
			Use Default Alternate ☑		○ For Business Process
					○ None of the above
			Alternate Delegate *		Retain Access to Delegated Tasks within My Tasks ☐
					Delegation Rule

1

Begin and End Dates:
Enter the timeframe for the delegation.
- The begin date cannot be in the past.
- The total duration must be 90 days or less.

How to Set Up a Delegation

On the **Manage Delegations** page:

2

Delegate: Enter or select up to 5 delegate(s)

> **Business Processes allowed for Delegation**

New Delegation 1 item

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do My Tasks On My Behalf
			Delegate *		⚪ For all Business Processes
					⚪ For Business Process
			Use Default Alternate ☑		⚪ None of the above
			Alternate Delegate *		Retain Access to Delegated Tasks within My Tasks ☐
					Delegation Rule

3

Alternate Delegate: Select the check box to use the default alternate delegate or uncheck the box and enter a new alternate delegate.
• The alternate delegate will only be used when the delegate cannot approve a task.

How to Set Up a Delegation

On the **Manage Delegations** page:

4

Start on My Behalf: Select the task(s) you would like the delegate(s) to start on your behalf.
- You may also leave this blank if you only want the delegate(s) to do My Tasks on your behalf.

> **Business Processes allowed for Delegation**

New Delegation 1 item

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do My Tasks On My Behalf
⊖			Delegate * Use Default Alternate ☑ Alternate Delegate *		○ For all Business Processes ○ For Business Process ● None of the above Retain Access to Delegated Tasks within My Tasks ☐ Delegation Rule

How to Set Up a Delegation

On the **Manage Delegations** page:

5

Do Inbox Tasks on My Behalf: Select For all Business Processes if you want to delegate tasks for all eligible for delegation or choose specific business processes from the dropdown menu.

- You may also select None of the above if you don't want the delegate to do *My Tasks* on your behalf .

> **Business Processes allowed for Delegation**

New Delegation 1 item

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do My Tasks On My Behalf
⊖			Delegate * Use Default Alternate ☑ Alternate Delegate *		○ For all Business Processes ○ For Business Process ◉ None of the above Retain Access to Delegated Tasks within My Tasks ☐

6

Retain Access to Delegated Tasks in My Tasks: Be sure to select this check box to ensure you retain the ability to perform the delegated tasks during the delegation period.

How to Set Up a Delegation

On the **Manage Delegations** page:

5

Do Inbox Tasks on My Behalf: Select For all Business Processes if you want to delegate tasks for all eligible for delegation or choose specific business processes from the dropdown menu.
- You may also select None of the above if you don't want the delegate to do *My Tasks* on your behalf.

4

Start on My Behalf: Select the task(s) you would like the delegate(s) to start on your behalf.
- You may also leave this blank if you only want the delegate(s) to do My Tasks on your behalf.

2

Delegate: Enter or select up to 5 delegate(s)

> Business Processes allowed for Delegation

New Delegation 1 item

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do My Tasks On My Behalf
⊕					
⊖			Delegate *		◯ For all Business Processes
					◯ For Business Process
			Use Default Alternate ☑		◉ None of the above
			Alternate Delegate *		Retain Access to Delegated Tasks within My Tasks

1

Begin and End Dates: Enter the timeframe for the delegation.
- The begin date cannot be in the past.
- The total duration must be 90 days or less.

3

Alternate Delegate: Select the check box to use the default alternate delegate or uncheck the box and enter a new alternate delegate.
- The alternate delegate will only be used when the delegate cannot approve a task.

6

Retain Access to Delegated Tasks in My Tasks: Be sure to select this check box to ensure you retain the ability to perform the delegated tasks during the delegation period.

How to Set Up a Delegation

7 After completing the steps, click Submit.

Submit | Save for Later | Cancel

You may receive an alert message when using Start On My Behalf delegation. The alert is to notify you the delegate(s) will gain access to all your previously created items of that type. For example, delegating *Create Expense Report* in the Start of My Behalf section will give the delegate(s) access to view your previous expense reports. Click Submit again to bypass the alert.

⚠ Errors and Alerts Found ▾

New Delegation 1 item

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do My Tasks On My Behalf
⊖	10/10/2024	10/10/2024	Delegate * ✕ Molly Manager (···)	✕ Create Receipt	○ For all Business Processes
			Use Default Alternate ☑		○ For Business Process
					⊙ None of the above
			Alternate Delegate *		Retain Access to Delegated Tasks within My Tasks ☐
					Delegation Rule

Tips for Delegation

An approved delegation can be edited or ended by the delegating worker, their Manager, or a Delegation Manager.

Subprocesses are not delegated along with its associated business process (e.g., delegating the *Hire* process does not also delegate the *Background Check* subprocess).

A delegate who initiates or approves a step in a delegated process cannot serve as an approver later in the process.

It may be necessary to click Selectable Values in the Delegate dropdown menu to see eligible delegates in a subordinate supervisory organization.

Eligible delegates are determined by primary job.

> If you or your desired delegate have multiple jobs, they may fall outside your supervisory organization and require a Manager or Delegation Manager to set up delegation.

What is a Delegation Manager?

A Delegation Manager is a security role which administers delegation for assigned supervisory organizations.

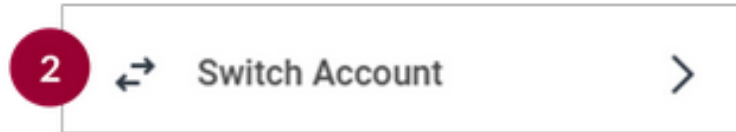Delegation Managers can approve delegation requests on behalf of supervisors.

Delegation Managers can also create, edit, or end delegation requests on behalf of employees in their assigned units.
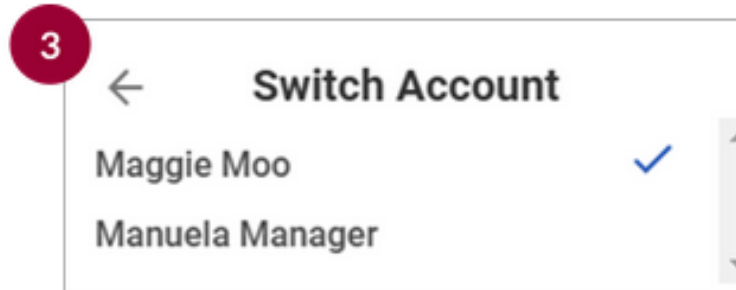
Being a Delegate

Switch Accounts

1. From the Workday Home Page, click the **Profile** icon (person icon) in the upper right corner.

2. Click **Switch Account**.

> **2** ⇄ Switch Account 〉

3. Click the account that you wish to act as a delegate on behalf of.

   NOTE: Each worker who has delegated to you will appear in the switch accounts list and the checkmark shows you the account you are currently in.

> **3** ← **Switch Account**
>
> Maggie Moo ✓
>
> Manuela Manager

Being a Delegate

Perform a Delegated Task as a Delegate

1. **Switch accounts** to the delegate on whose behalf you will act.

2. On the **Delegation Dashboard**, click the **My Task** icon (mailbox) to open a limited version of the delegating worker's inbox.

   NOTE: Only items delegated to you by the delegating worker will be available.

3. Click on the delegated item and perform the task.

Being a Delegate

Start a Business Process as a Delegate

1. **Switch accounts** to the delegate on whose behalf you will act.

2. Search for and select business process from the search bar that you want to start on behalf of the delegate.

   NOTE: Only business processes delegated to you to start will be available.