Workday Reference Guide
Delegations

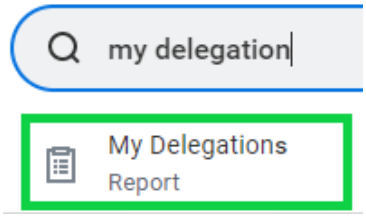
July 2022

Guidelines

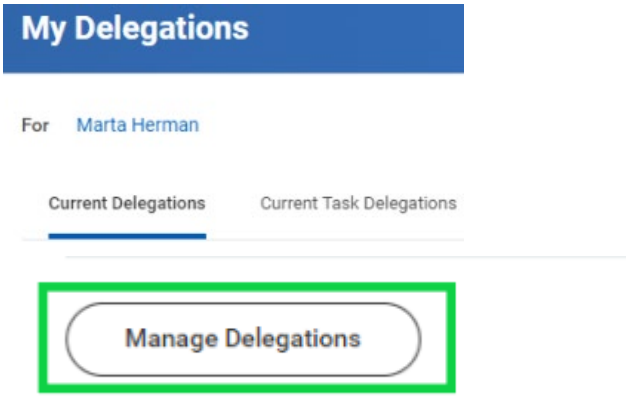
- Delegating a task does not absolve the person delegating the task of their responsibilities. They are still accountable for the delegate's actions as it related to the delegated task.
- Users that have had initiating or approval tasks delegated to them are responsible for completing the appropriate training and familiarizing themselves with the reference materials and available support.
- It is ***strongly recommended*** that individual tasks/events be thoughtfully considered for separate delegations rather than delegating all tasks/events to the same user.
- Validations ensure
    - Delegation between UR and Affiliate entities is not permitted. This includes delegating between UR/URMC and a UR Medicine Affiliate, or between different UR Medicine Affiliates.
    - Delegation length cannot exceed 365 days. Please ensure the delegation time is no more than 12 months.
- Users that may be designated as a delegate can be:
    - Peers – anyone that reports to the same manager as you
    - Superiors – your manager and their managers up in the same management chain
    - Subordinates – anyone that reports to you or anyone that reports to any of your peers
    - Anyone else in your facility's company hierarchy
- The Delegation Request will not route for approval if the designated delegate is the user's Superior, Peer, or Subordinate (including the user's Peers' Subordinates).
- The Delegation Request will route for approval if the designated delegate is not the user's Superior, Peer, or Subordinate (including the user's Peers' Subordinates). The Delegation Request routes to the user's **Manager** for approval. See FAQ > ***Who is a Workday Manager*** for more information.

Delegation Set Up

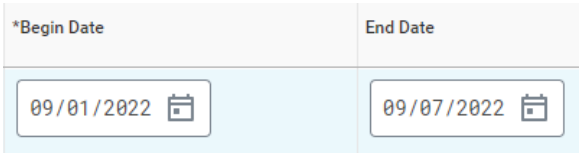
1) To view current delegations or to create new delegations, search for **My Delegations** in the search box in Workday and click on the **My Delegations** report



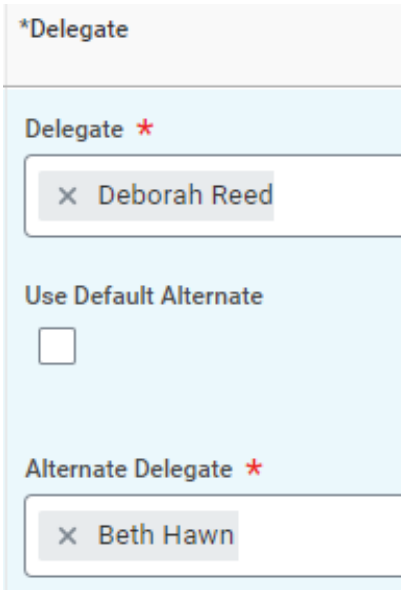
2) Select the **Manage Delegations** button



3) Delegations require a specific date range. Enter the **Begin Date** and **End Date**.
    a) To delegate for a single day, enter the same Begin Date and End Date.
    b) **Delegations cannot be set for more than one year.**

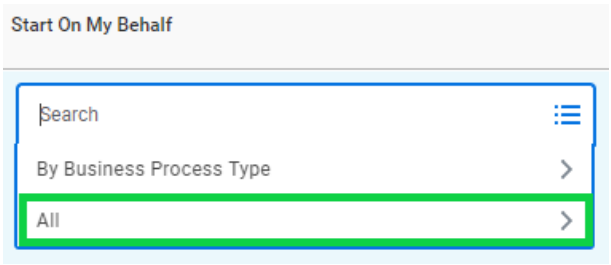


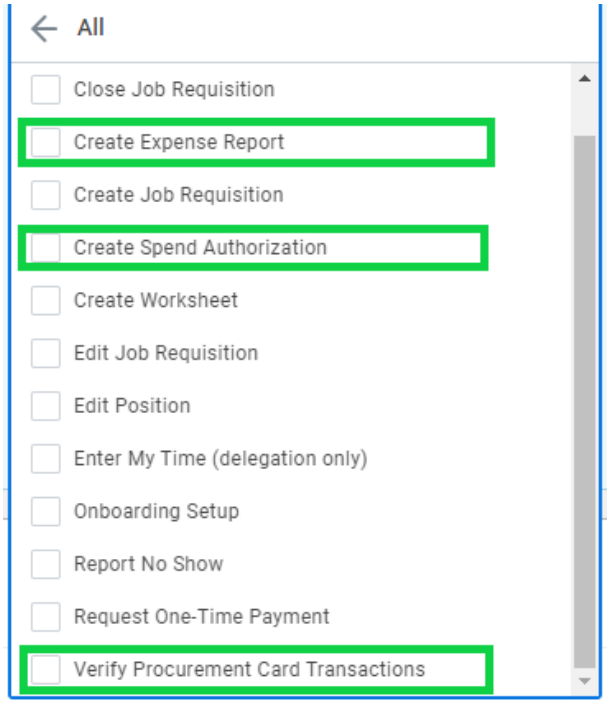
4) Select the delegate.
    - ***Alternate Delegate***: Alternate Delegates *cannot* initiate business processes on behalf of a Delegate. When delegating initiation tasks, no edit necessary.
    - Workday routes business process steps to an Alternate Delegate only when the Delegate is excluded based on routing restrictions. Most UR business process exclude a user from approving a transaction they initiated (the approval will route to the Alternate Delegate). Meaning, when delegating approval tasks to a Subordinate of yours, you must uncheck the **Use Default Alternate** checkbox and designate an alternate approver.

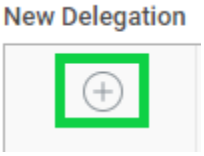


5) Start On My Behalf

- To delegate the initiation of transactions, select the task(s) you would like the Delegate to initiate on your behalf by typing in the transaction name or selecting ***All*** in the menu list to make your selection.
- ***Alert: When you delegate the creation of an item, you give the delegate access to all of your previously created items of that type.***
- Select ***only*** those tasks that you wish to delegate.
- Expenses transactions that can be initiated include: ***Create Expense Report*** and ***Create Spend Authorization***
- Procurement transactions that can be initiated are limited to only ***Verify Procurement Card Transactions***.

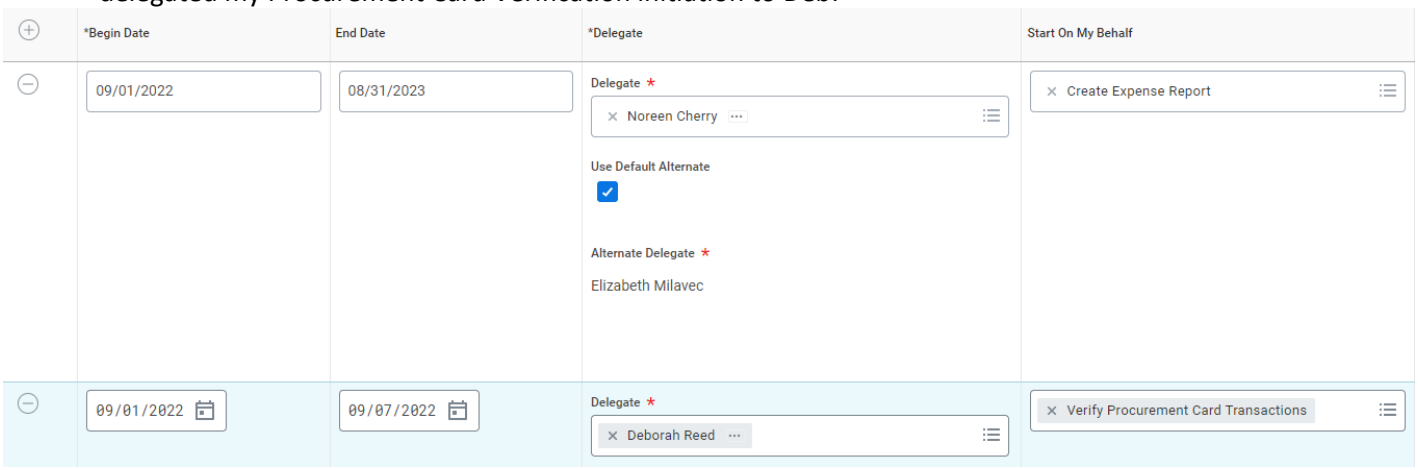






- To delegate initiation of different transactions to different users, click on the plus sign to add another Delegation row

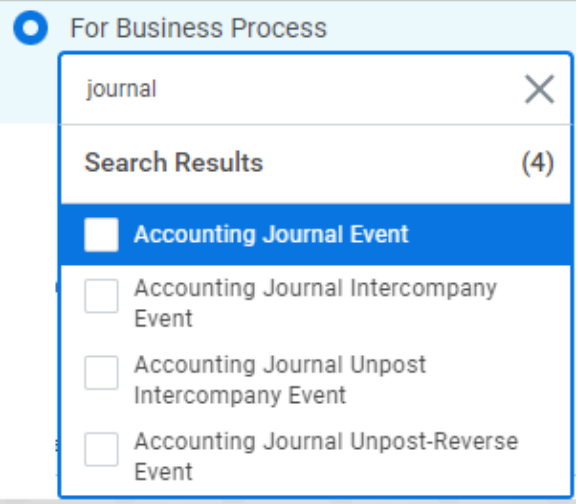
For example, in the below I have delegated initiation of my Expense Reports to Noreen whereas I have delegated my Procurement Card Verification initiation to Deb:



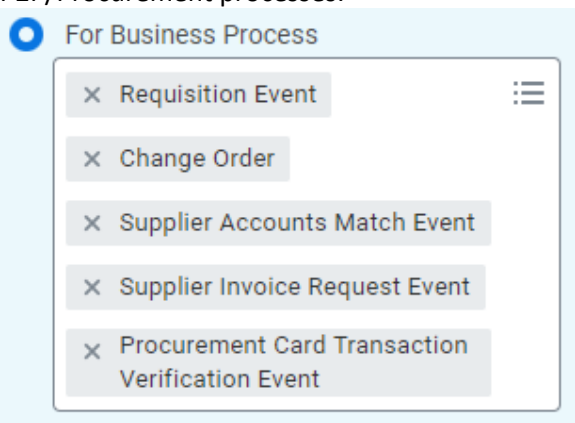
6) Do Inbox Tasks On My Behalf

- Select the business process that you want to delegate by searching. It is ***strongly recommended*** that you do not select ***For All Business Processes.***
- Common processes are shown below.
- Select ***only*** those tasks that you wish to delegate.

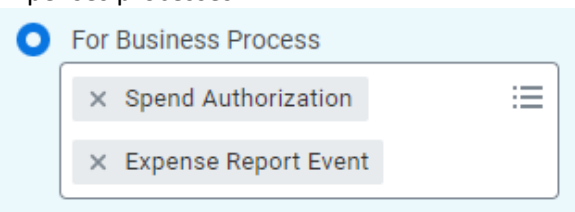
Accounting processes:



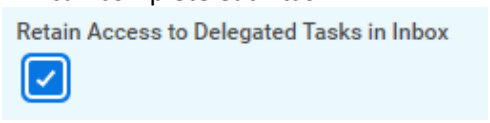
P2P/Procurement processes:



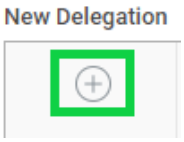
Expenses processes:



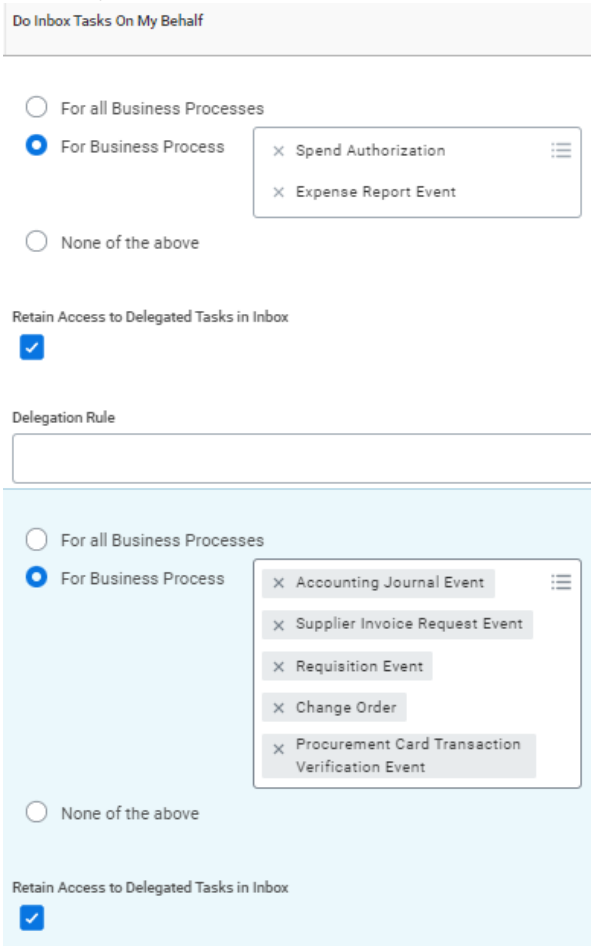
- Select ***Retain Access to Delegated Tasks in Inbox*** if you want to get notifications and access the tasks from your own Inbox as usual. If you retain access, then either you or your delegate can complete each task.



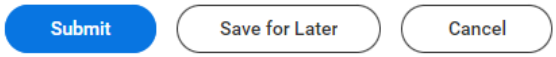
- To delegate different Inbox Tasks to different users, click on the plus sign to add another Delegation row



For example, in the below I have delegated Spend Authorization and Expense Report approvals to one user and approvals of Journals and P2P/Procurement to a different user.

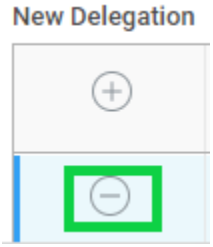


- Press the **Submit** button to process the delegation, or press **Save for Later** in the event that you are not ready to have the delegation in effect at that time.



Things to know once a Delegation Request is approved

- The Delegate will receive an email notification informing them of
  - Who has delegated
  - The duration of the delegation
  - What has been delegated, including whether those are initiating (**Start on My Behalf**) or approval (**Do Inbox Tasks On My Behalf**).
  - Directions to training resources/materials
- Both you and either the delegate or the alternate delegate receives confirmation notifications when the delegations go into effect.
- Upon approval and in conjunction with the Start Date of the delegation, initiation tasks as a delegate can begin.
- Delegates will start receiving delegated approval tasks only when *new* transactions are initiated. Any transactions *already initiated* will continue to flow to the original approver. The delegator should therefore make an effort to address all their Inbox tasks prior to their vacation or other absence from Workday approvals since the Delegate will not be able to action them.
- Delegates can also request reassignment for any delegated tasks (that were initiated but not yet reached your process step), but they cannot delegate any delegated tasks to another worker.
- For the duration of the delegation, either the delegate or the alternate delegate receives any tasks that would have been directed to you for allowed business processes, as well as any related process notifications, including alerts.
- Any delegated tasks will be recorded in the Process History with the name of the Delegate, the words “on behalf of”, and followed by the name of the delegator. Example:
  Marta Herman on behalf of Jake King
- To stop a delegation, remove the row associated with the delegation from the grid by clicking the minus sign next to it and then click **Submit**.



- If you need to modify your current delegations, click **Request Delegation Change** from the **Manage Delegation Settings** page and enter the new information. The page displays your current delegations and your delegation history.

Next Steps as a Delegate

Use the **View My Delegation Assignments** report to see all the business process initiation steps which others have delegated to you.

When tasks are delegated to you, you can switch accounts to perform the tasks on behalf of another user. Workday displays the **Switch Account** option in:

- The menu displayed when you click your name or photo in the application header.
- Delegated Inbox tasks in your Inbox.

Selecting **Switch Account** presents you with a list of users who have delegated Inbox tasks or Initiating Actions to you. Select the user for whom you want to act as a delegate.

Once you switch accounts, Workday displays:

- **On Behalf of**, followed by the name and photo of the delegator.
- The ***Delegation Dashboard***, which includes the **Delegated Actions** worklet, and from which you can take Initiating Actions on any business processes that have been delegated to you by the user on whose behalf you are acting.
- The Inbox, which (when selected) contains only the Inbox tasks delegated to you by the user on whose behalf you are acting, and from which you can view the details and complete the tasks.

  Note: Delegated Inbox tasks are displayed in your Inbox (for your Workday account) as well. The action item titles display **On Behalf of**, followed by the name of the delegator to indicate that they are delegated tasks. However, you cannot view the details or complete the tasks until you switch accounts. In addition, you cannot view the details of or complete delegated Tasks steps, such as those found in the Onboarding business process.

- Delegated tasks that you have completed are displayed on the **Archive** tab of the delegating user's Inbox but are not displayed in the Inbox when you are acting as a delegate for another user.

To switch back to your Workday account, select **Switch Account** again, and select your own name.

Reports

Select **My Delegations** from the ***Settings*** menu on the **Actions** tab of your Workday Inbox. The **My Delegations** report displays completed tasks from the delegating user's point of view:

Item	Description
Current Delegations	Displays the business process delegations that you have defined for your Inbox tasks. Workday only displays delegations as long as they're active. They are removed as soon as the End Date has passed or you've explicitly stopped the delegation.
Current Task Delegations	Displays all tasks that you have delegated using the **Delegate Task** task and that the delegate has not yet completed.
Delegation History	Displays all delegation requests that you initiated. This tab contains the same delegation requests as the **Current Delegations** tab, except that here the requests are not removed once they have expired or been stopped.
Delegated Tasks	Displays all tasks that a delegate has completed on your behalf.
Business Processes allowed for Delegation	Lists all the business processes that you can delegate.

You can access these reports to view additional delegation details:

- **Business Process Transactions Awaiting Me**: Displays all business process steps that are awaiting your action.
- **View All Delegated Tasks**: Displays a list of all delegated tasks that you can perform based on the original assignment date.
- **View More Processes**: Displays a list of delegated business processes and who took action on your behalf.
- **View and Maintain Notifications**: Displays the notifications for the delegating user sent during the time that the delegation is in effect.