WHAT CAN YOU DELEGATE TO SOMEONE ELSE?

Within Workday, employees have the opportunity to delegate the initiation of certain tasks as well as the ability for the delegate to take action on items that are routed to the delegator's Workday inbox. The specific business processes that you have the ability to delegate will be listed by business process type within the **Manage Delegation** business process. See *Manage Delegation Job Aid* for more step by step instruction.

Workday employee-as-self transactions related to Personal Information should not be delegated. This information is very personal to the employee. Similarly, Effort Certification cannot be delegated to another employee. This monthly process requires the employee to certify that any time off/leave has been reported and that costing allocations reflect the employees work for the given period.

WHO CAN I DELEGATE TO?

See FASOP: AS-16 for details. This is a summary chart:

Functional Area	Workday Business Process (BP)	Delegate	Delegator	Approved by	Duration
Expenses	Spend Authorization Expense Report	Employee with Travel or LaCarte responsibility for the department	Employee	Manager	One year
FIN and HCM	FIN and HCM delegation enabled BPs	Authorized Agent	Pres, VP, D, D, DH	Manager	One year
FIN	FIN delegation enabled BPs	Peer	Cost Center Manager	Manager	Short periods of time off
FIN	FIN delegation enabled BPs	Peer	Employee	Manager	Short periods of time off
HCM	Time Time Off	Peer	Manager	Manager	Short periods of time off
HCM	HCM delegation enabled BPs	HR Specialist	HR Specialist	Manager	Short periods of time off

WHAT APPROVAL IS REQUIRED TO SET UP A DELEGATION?

In order to delegate a task for business process, an employee requires the approval of the manager (direct supervisor). The business process routes the delegation request to the employee's manager within Workday.

HOW LONG CAN A DELEGATION BE SET UP FOR?

Delegation is a feature within Workday that is intended to used to temporarily reassign a task or business process in case of a leave of absence. For longer periods of delegation, University policy states that delegation requests be set up with an end date within one calendar year of the request or July 31st, which ever period is shorter.

CAN YOU DELEGATE PARTS OF A BUSINESS PROCESS?

You are allowed to delegate those steps within a business process for which your role has been granted access. For example, as an employee, you can delegate the initiation of the **Expense Report** business process, but you would not be allowed to delegate the approval of that request.

CAN YOU DELEGATE BY ROLE INSTEAD OF TASK OR BUSINESS PROCESS?

No. Delegation within Workday is only allowed by business process or task.

CAN YOU DELEGATE A PARTICULAR TASK TO MULTIPLE PEOPLE?

Yes, you can delegate a particular task to multiple people.

CAN THE PERSON I DELEGATED TO DELEGATE THE AUTHORITY TO SOMEONE ELSE?

No, per policy, the employee to whom authority has been delegated cannot delegate further.

MANAGE DELEGATIONS

Delegation within Workday MUST be consistent with University Policy (FASOP-16).

Within Workday, employees can delegate:

- The **Initiation** of certain business processes for a specified period of time

- The ability to take **Action** on inbox items associated with **All** business processes or **Only Specific** business processes for a specified period of time
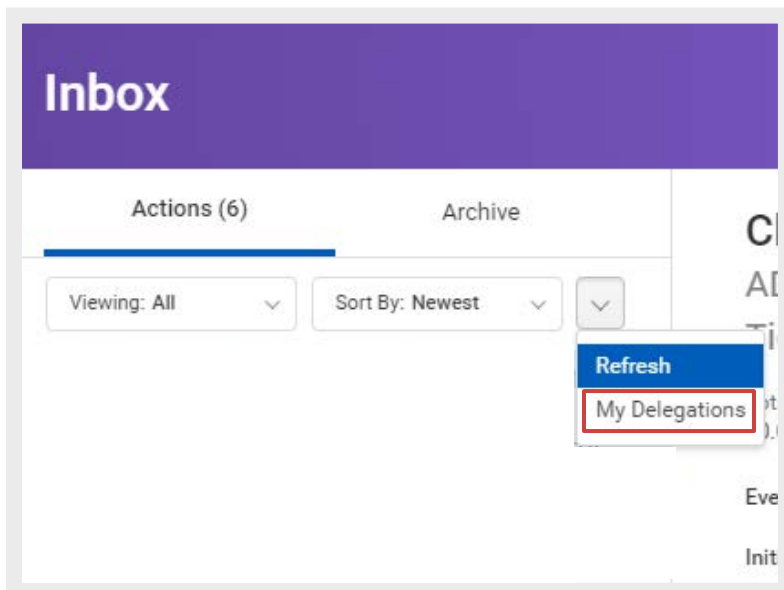
- A task directly from the inbox.

All delegation requests require the approval of the delegator's **Manager**.
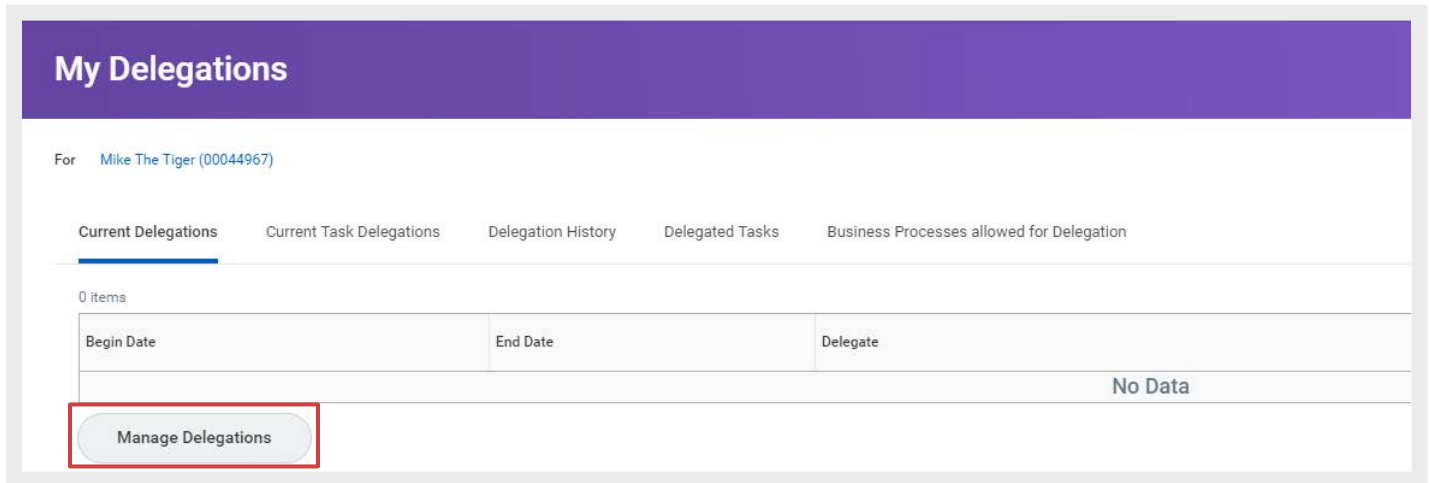
MANAGE DELEGATIONS – SPECIFIED PERIOD OF TIME

To establish delegation for specified period of time, from the **Home Screen**:

1. Go to **My Account** and click **Inbox**.

2. From the Inbox, select the **More** Icon and then click on **My Delegations**.

3. Under the Current Delegations tab select **Manage Delegations**.

4. Under **New Delegation** complete the following information:

   a. Select the **Begin Date** of the Delegation.

   b. Select the **End Date** of the Delegation. Consistent with University policy, it is recommended that the **End Date** on the delegation be set no longer than 1 year out or July 31 – whichever period is shorter.

   > Delegation begins at 12:00:01 a.m. on the **Begin Date** and ends at 11:59:59 p.m. on the **End Date**. To delegate for a single day, enter the same **Begin Date** and **End Date**.

   c. Click the Prompt to select one or more **Delegates**.

   d. The **Alternate Delegate** will automatically populate with the manager for each delegate. The **Alternate Delegate** can be changed, but a minimum of at least one **Alternate Delegate** is required.

   > An **Alternate Delegate** cannot initiate a business process on behalf of a Delegate.

   e. In the **Start on my Behalf** field, use the Prompt to select the business processes that you wish to delegate.

   <u>NOTE</u>: For each business process in which the initiation is delegated, Workday will provide a warning prompt which serves to remind you that you are also allowing the delegate to access all of your previously created items of the same type.
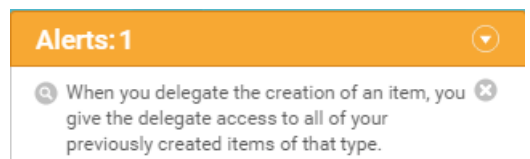
f. Under **Do Inbox Tasks on my Behalf,** select **For all Business Processes, For Business Process,** or **None of the Above** if you wish to have no one act on tasks that come to your Inbox.

> If inbox delegation is established for the **Spend Authorization** or **Expense Report Event** business processes or **All Business Processes**, the user will be prompted to select the **Expense Approval Delegation Rule – Revised.**

g. Select the prompt on **Retain Access to Delegated Tasks in Inbox**, if you wish to retain access to tasks that have been delegated.

5. To establish another delegation, click the **Plus Icon** to add another line. Then repeat Step 4.

6. Add any relevant **Comments** in the Comments field.

7. Once you have finished adding all of your Delegations, Click **Submit** to send the request to your manager for approval.

8. Click **Done**.

MANAGE DELEGATIONS – DIRECTLY FROM INBOX

To delegate a task directly from your **Inbox**:

1. From the **Inbox**, click on the task that you are interested in delegating.

2. Select the **Actions "Gear" Icon** and then select **Delegate Task**.

3. Type the name of the **Proposed Delegate**.

4. Add any relevant **Comments** in the Comments field.

5. Click **Submit** to send the request to your **Manager** for approval.

6. Click **Done**.
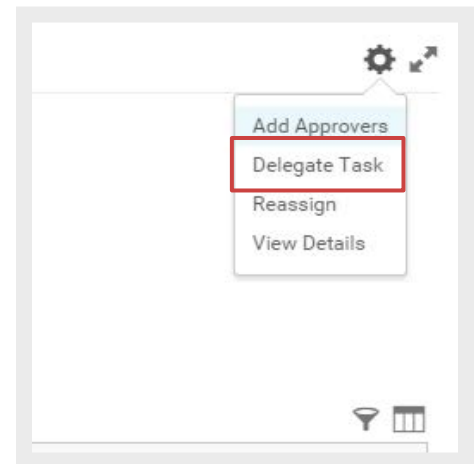
DELEGATION APPROVAL PROCESS

1. **Manager** locates delegation request in their **Inbox**.

2. Review delegation request details and any comments.

3. Click **Approve**, **Save for Later**, **Cancel** or **Deny**.

4. Click **Done**.

Note: Once approved, the delegate will receive notice of the delegation in their **Notifications** box.