Basics:  Delegation

Workday Delegation gives access to the initiation/approval of tasks to another user. A delegate can access only the tasks that have been delegated and can drill down only as far as the delegating employee already has access to. Delegation can be provided to a user for a set period of time and for specific processes or tasks.

There are three types of delegation available: Inbox, Business Process Initiation, and Task.

Delegation does not remove responsibility from the initial owner. When the delegation period ends, incomplete tasks revert to the original owner.

**Delegate your Inbox**

Allows a user to give access to their entire Inbox (or specific business processes from their Inbox) to an individual for a specific period of time

**Note:** See *Tasks that can be Delegated*, for relevant business processes and roles

In your Workday inbox:

1. While in the *Actions tab*, click  
2. Click *My Delegations*
3. Click *Manage Delegations*
4. Click to select the *Begin Date* and *End Date*
5. In the *Delegate* field, type the name of the user you want to delegate your tasks to and select their name from the search results
6. Click to select the desired Business Process In *Start On My Behalf*
7. Select *None of the above* in the *Do Inbox Tasks on My Behalf* column
8. Click *Submit*

**Delegate a Task**

Allows users to delegate a task that is already awaiting user action in their Inbox

**Note:** See *Tasks that can be Delegated*, for relevant business processes and roles

In your Workday inbox:

1. Select the task you wish to delegate
2. Click  at the top right of the task
3. Click *Delegate Task*
4. In the *Proposed Delegate* field, type the name of the user you want to delegate your tasks to and select their name from the search results
5. Click *Submit*
Basics: Delegation

Stop Inbox or BPI Delegation
In the Search bar:
1. Type my del
2. Click My Delegations
3. Click Manage Delegations
4. Click
5. Click Submit

Stop Task Delegation
In the Search bar:
1. Type my del
2. Click My Delegations
3. Click the Current Task Delegations tab
4. In the Business Process column, click next to the relevant delegated task
5. Click Business Process > Delegate Task
6. Check Stop Current Delegations
7. Click Submit

Instructions for Delegates
If another person’s Inbox tasks have been delegated to you, or you have been given the ability to start certain tasks on someone else’s behalf, follow these steps:

Inbox
1. Access your workday inbox
2. Click on the delegated task in the Actions tab
3. Click on Switch Account
4. Click OK
5. Click View Inbox

To switch back to your account:
6. Click on your name at the top right hand corner
7. Click Switch Account
8. Select your account (self)

Start Tasks on Someone Else’s Behalf
1. Click on your name at the top right hand corner
2. Click Switch Account
3. Select account
4. At this point you may start tasks on this person’s behalf

To switch back to your account, repeat steps 1-2 and select your account (self)
Basics: Delegation

Tasks that can be Delegated

Inbox Tasks on Your Behalf (with relevant roles)

As explained under Delegate your Inbox and Delegate a Task, when delegating your inbox, you may specify specific tasks that the delegate will be responsible for. In addition, you may delegate a single task that is already in your inbox.

Note: When selecting For all Business Processes, Workday will only route tasks that can be delegated (in the list below).

These are the tasks that you may delegate with the above delegation types:

- **Add Additional Job** – Central Student, Central Faculty, Central HR (Staff), HR Partner, Manager
- **Assign Costing Allocation** – Cost Center Manager
- **Change Default Compensation** – HR Partner, Central Faculty, Cost Center Manager, RAC/Budget Approver
- **Change Job** – HR Partner, Manager, Central Student, Cost Center Manager, Central Faculty
- **Change Organization Assignments for Worker** – Cost Center Manager, Central Benefits
- **Close Job Requisition** – Job Posting Reviewer, Central Faculty
- **Correct Time Off** – HR Partner, Manager
- **Create Position** – Central Faculty, RAC/Budget Approver, Cost Center Manager
- **End Additional Job** – HR Partner, Manager
- **Hire** – Central Student, Central Faculty, Job Posting Reviewer, HR Partner, Manager, Cost Center Manager, Union Administrator
- **Job Requisition** – HR Partner, Central Faculty, Central Student, RAC/Budget Approver, Job Posting Reviewer
- **Job Requisition Change** – Job Posting Reviewer, Central Faculty
- **Passports and Visa Change** – Central Faculty, Central HR (Staff)
- **Period Activity Pay** – HR Partner, Cost Center Manager, RAC/Budget Approver, Central Compensation, Central Faculty
- **Photo Change** – HR Partner, Manager
- **Preferred Name Change** – HR Partner, Manager
- **Propose Compensation** – HR Partner, Cost Center Manager, Central Compensation, Central Student, Central Faculty
- **Request Compensation Change** – HR Partner, Cost Center Manager, Central Student, Central Faculty, Central Compensation
- **Request One-Time Payment** – HR Partner, Cost Center Manager, Central Faculty, Central Compensation
- **Switch Primary Job** – HR Partner, Manager, Central Benefits
- **Request Time Off** – Manager, Central Benefits
- **Termination** – Central Faculty, HR Partner, Central Student, HR Partner, Central Benefits, Central HR (Staff)

Start Tasks on Your Behalf – for Managers

These are the tasks that managers can delegate to people to initiate on your behalf:

- **Change Job**
- **Close Job Requisition**
- **Correct Time Off**
- **Create Position**
  
  Note: Create Position cannot be initiated as a standalone business process and should always be paired with the delegation of Job Requisition.
- **Hire**
- **Job Requisition**
- **Job Requisition Change**
- **Request One-Time Payment**
- **Request Time Off**
- **Termination**
Basics: Delegation

Limitations

- Delegates will not be able to delegate a task that has been delegated to them
- A delegate cannot cancel a business process they initiated, even when the Initiator security group has Cancel permissions on the business process security policy
- Canceling a business process event after it has been processed falls outside the scope of what is delegated
- A delegate can approve a BP for which they are the subject
- If a delegate is transferred to another organization they will retain access as delegate until removed
- Delegation set up cannot be retro-dated (start date greater than or equal to today's date)
- Delegates will not receive analytics (reports) access to business processes even if the BPs are delegated to them, only actions/to-do's are delegated
- Approvals of delegated processes do not clearly list that the process was initiated by a delegate; approvers must look at the “Process History” to view this information