HCM: Manage Delegations

Manager

About Delegations in Workday

Delegations in Workday allow a user to temporarily assign their Workday tasks, approvals, or business process responsibilities to another user. This is helpful when someone is out of the office or unavailable. Delegations can be set for specific dates and can be limited to certain types of tasks or processes, ensuring work continues smoothly without disruption.

View Delegations

From the homepage:

- As a Manager, go to the Search bar at the top of the screen, type “My Delegations.”
- Click on the My Delegations task from the search results.
- This opens the Delegations page, where you can view, create, or manage your delegations.
- You can also view your delegations by navigating from the “Awaiting Your Action” widget on the homepage. Choose the first Task at the top of your list. In the screen to the right, there is a “gear” button at the top. Select that button and review the Delegation options.

Things to Consider When Navigating Delegations

1. **Scope of Delegation**
   Only a certain set of tasks or business processes are able to be delegated. This is to avoid broad, unnecessary, access.

2. **Delegate’s Security Access**
   The person you delegate to must have security permissions for the tasks you’re delegating. Otherwise, they may not be able to complete them.

3. **Effective Dates**
   Set accurate start and end dates for your delegation period to avoid gaps or unintended approvals after you return.

4. **Approval Limits & Sensitive Actions**
   Consider whether the delegate should handle sensitive actions, like compensation changes or confidential approvals. The system may already have taken into consideration.

5. **Communication**
   Always inform your delegate so they’re aware of the extra responsibilities and any deadlines.

6. **Review and Revoke**
   Periodically review your delegations and revoke them if they’re no longer needed.

7. **Audit & Compliance**
   It is good platform practice and control to regularly audit delegation configuration.

Note: Delegation should be used as a temporary setting, when someone will be out of the office or vacation for a period of time. In most cases, it should not be set indefinitely, due to awareness and responsibilities associated with the original Task assignee.

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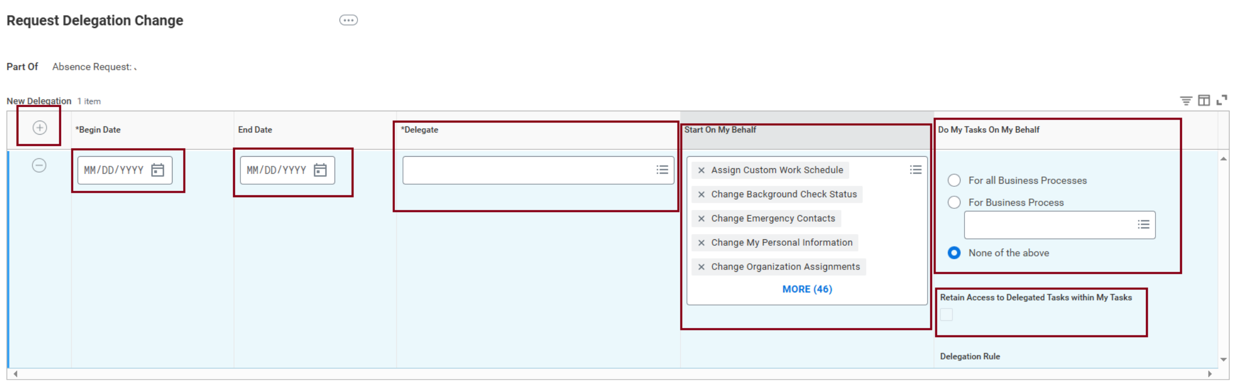
How to Delegate a Task

Let us review how to delegate a task through "Requesting Time Off" business process, as an example.

Note: If the Time Off request is longer than 3 days, Workday automatically sends a task for you to set up a delegation for the time you are out. It is an optional task.

From the Delegation menu, once you click on the "gear" button for the Task you wish to Delegate:



1. Fill out the delegation form
2. Click on a +
3. Enter Start Date of delegation (first day of your time off) and an End Date (last day of your time off)
4. Select a "Delegate". You can select from 3 groups:
   a. Your Peers (all direct reports to your Manager)
   b. Your Superior (Manager and Manager's Managers)
5. Select the Business Process that your Delegate can START on your behalf (you can select all by going to ALL category, clicking Ctrl+A, space bar)
6. Select if your Delegate can perform a TASK on your behalf (e.g. complete an approval step). Determine for which business processes this will apply:
   a. "For all Business Processes" (they can complete tasks on your behalf in all Business Processes where you have access)
   b. "For Business Process" (you can limit their ability to complete tasks on your behalf to a specific Business Process
   c. "None of the above" (they will not be able to complete tasks on your behalf)
7. Finally, indicate the level of awareness you want to retain as you delegate these tasks for this time period In the "Retain Access to Delegated Tasks within My Tasks" menu
   a. If selected, you will receive notification of the tasks in your task inbox while the Delegate will also get them.
   b. If unchecked, all task notifications will go to Delegate only
8. Click "Submit"
9. Next Step: it will go to your Manager for approval
10. Once Approved, your Delegate will receive your tasks and will be able to "switch accounts" to complete the Tasks or Business Processes you delegated to them, on your behalf.