

# Workday Reference Guide

## Delegations

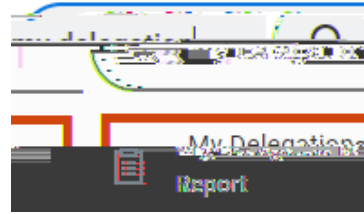
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### Guidelines

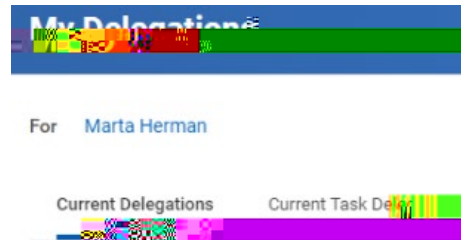
- Delegating a task does not absolve the person delegating the task of their responsibilities. They are still accountable for the delegate's actions as it related to the delegated task.
- Users that have had initiating or approval tasks delegated to them are responsible for completing the appropriate 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 >

## 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** the

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***



## 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**

## 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