Delegations for Managers

Delegation Guidelines:

- Delegations are temporary reassignments of tasks to another user, enabling that user to perform individual actions on your behalf.
- All requests to delegate will go through a manager for approval.
- You should delegate a specific business processes from your Inbox, for a specified period of time. We recommend not to delegate the entirely inbox and remember to click "Retain access to Delegated Tasks"
- Workday also enables you to delegate the Initiating Action of specific business processes (i.e., a VP can delegate the ability to create expense reports to their executive assistant). Not all business process are eligible to initiate on your behalf.
- Delegation does not confer access to view your personal information.
- Delegating an approval 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.
- Delegates will start receiving the delegated tasks only when new transactions are initiated. Any transactions already initiated will continue to flow to the original user.
- Attach any supporting files, such as an email message accompanying the requested delegation change, to be included as part of the business process event.
- Both you and either the delegate or the alternate delegate receive confirmation notifications when the delegations go into effect.
- Delegates can also request reassignment for any delegated tasks, but they cannot delegate any delegated tasks to another worker.
- Any delegated tasks will be recorded in the Process History with the words "On Behalf of", followed by the name of the delegator.

> **Note**
>
> IMPORTANT:
>
> You can only delegate to staff under your same supervisory organization.
>
> Delegations should be used only when you will be unavailable to complete time-sensitive tasks. Inbox alerts will contain HR related tasks may contain salary or other personal information. Delegating your entire inbox should be done only when you will unavailable for an extended period of time, and be delegated to a person (peer or superior) who already has access to the same information you do.
>
> Make sure you click the checkmark to retain access to your inbox otherwise only your delegate will have access to those inbox items.

> ⓘ Please monitor your delegations for staff changes and end dates. Delegations will disappear from your list once they expire. Make sure you extend delegations by changing the end date into a future date.

On this job aid:

- Create a Delegation
- Cancel or modify the delegation
- Acting on Behalf of Another User
- Sample Delegations
    - Manage Time: Approve absences and leave, review, and correct time.
    - Manage expenses or Lynn One Card transactions on your behalf. Select Create Expense Reports, Create Spend Authorizations and Verify Procurement Card Transactions
- Common tasks to delegate:

Managers can use delegation to allow additional users to act on their behalf for any approvals in the system. Delegations will allow Administrative/Executive Assistants to approve direct reports absences, create expense reports, and verify PCard transactions.
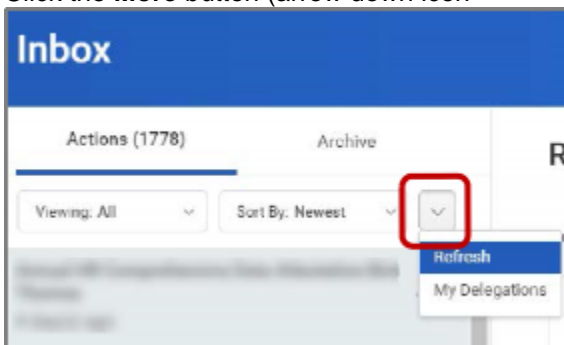
Create a Delegation

View current delegations or create a delegation to allow a co-worker to act on your behalf:

Search My Delegations or:

1. Click on your Inbox

2. Click the **More** button (arrow down icon   ) and select **My Delegations**.

3. On the **My Delegations** page, click the **Manage Delegations** to open the Manage Delegation page.

4. Enter a **Begin Date** – it cannot be prior to the current date.
5. Enter an **End Date**.
6. In the **Delegate** field, enter the name of a person (or more than one person) to whom you will delegate.

7. In the **Start on my Behalf** field, choose the task you'd like them to start, (i.e. Create Expense Report). Add a line for each task you want the delegate to be able to start (initiate) on your behalf.

8. In the **Do Inbox Tasks On My Behalf** field, choose one of the options if you want to allow your delegate(s) the ability to see and act on any tasks that appear in your Inbox.

   We do not recommend to delegate all business processes. We recommend you detail the specific process to delegate. Click tab "Business Processes allowed for Delegation," so see a complete list.

> **Note**
>
> **Important**: Individuals assigned as a delegate on behalf of a manager for Time Tracking can only approve tasks of *Enter Time*, *Enter Time Off,* and *Correct Time Off*.

9. We recommend that you check the **Retain Access to Delegated Tasks in Inbox** box to retain the ability to complete your tasks.

10. Click **Submit**.

> ⊘ **Important:** The delegation request will route to your manager for approval.

Cancel or modify the delegation

Once you submit the delegation, you can cancel or modify it. The way you proceed depends on whether your manager has already approved your delegation or not.

If the delegation is approved:

For approved delegations, you can modify the dates, tasks, and other information, and you can add new delegates or remove delegates.
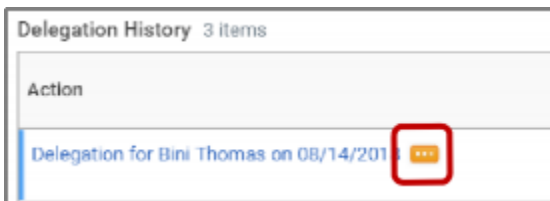
1. In your Workday Inbox, click the **More** button and select **My Delegations**.
2. On the **My Delegations** page, click the **Manage Delegations** button.
3. Modify the delegation as you like. Click the **Remove Row (minus)** button to delete the delegation.
4. Click **Submit.**

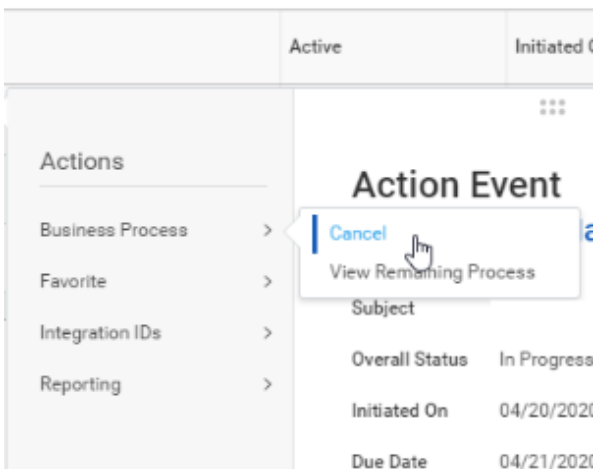## If the delegation is not approved:

1. In your Inbox, click the **More** button and select **My Delegations**.
2. Click the **Delegation History** tab. The unapproved delegation will be in progress.

Delegation History

3. To cancel a delegation request, click the **Related Actions** icon off the delegation that is "In Progress."

Delegation History 3 items

Action

Delegation for Bini Thomas on 08/14/201

4. Select **Business Process** and click **Cancel**.

Actions

Business Process >

Favorite >

Integration IDs >

Reporting >

Action Event

Cancel

View Remaining Process

Subject

Overall Status   In Progress

Initiated On   04/20/202(

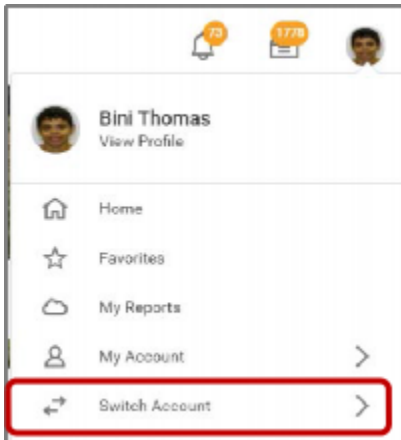Due Date   04/21/202(

Active   Initiated (

5. Enter a **Comment**.
6. Click **Submit**.

Acting on Behalf of Another User

You are assigned to be a delegate by a co-worker to perform approval tasks on their behalf. Follow the instructions below to act on their behalf:

1. On your profile menu, click **Switch Account** to switch to the delegated account.

2. Click the user for whom you are a delegate.

> **Note**
>
> Switching accounts brings up the delegation dashboard with delegated actions. From here, you can initiate business processes that have been delegated to you by your co-worker.

3. Users can initiate tasks by clicking on actions under **Reports & Tasks**.

4. To switch to your personal Workday account, click the **Switch Account** and click your own name.

   To view the Inbox that is delegated to you by your co-worker:

5. After switching to the delegated Inbox, click the Inbox icon, and you can see your co-worker's delegated Inbox.

Sample Delegations

Manage Time: Approve absences and leave, review, and correct time.

Manage expenses or Lynn One Card transactions on your behalf. Select Create Expense Reports, Create Spend Authorizations and Verify Procurement Card Transactions

Inbox Approvals for time and attendance inbox items

> **Business Processes allowed for Delegation**

Inbox approvals for cost center related business processes

> **Business Processes allowed for Delegation**

Common tasks to delegate:

⚠ The system allows only a limited group of Initiating Actions You Can Delegate on your behalf. Please refer to the list at the end of this job aid.

Start on my Behalf

Function	Initiate Field	Business Process Type	Selection	Description
Procurement	Start On My Behalf	Expenses	Create Expense Report	Use this option to delegate creating expense reports on your behalf (both personal and Lynn T-EXP travel expense (brown) card).
Procurement	Start On My Behalf	Expenses	Create Spend Authorization	Use this option to delegate creating Spend Authorizations (estimated costs to be reimbursed to the employee and cash advances).
Time and Attendance	Start On My Behalf	Assign Work Schedule	Assign Work Schedule	Use this option to delegate assigning work schedule for shift eligible employees.
Time and Attendance	Start On My Behalf	Review Time	Review Time	Use this option to delegate reviewing hourly workers time cards.
Time and Attendance	Start On My Behalf	Enter Time	Enter Time for Worker	Use this option to delegate entering time for hourly workers.
Time and Attendance	Start On My Behalf	Absence Calendar	Correct Absence	Use this option to delegate correcting employee absences
Time and Attendance	Start On My Behalf	Absence Calendar	Enter Absence	Use this option to delegate entering employee absences
Hiring	Start On My Behalf	Create Position	Create Position	Use this option to delegate creating a position before it can be approved and posted for hiring. Unless you are filling a vacant position, you will need to Create a New Position in your hiring process.
Hiring	Start On My Behalf	Edit Position	Edit Position	Use this option to delegate editing created positions before it can be approved and posted for hiring. Unless you are filling a vacant position, you will need to Create/Editing a New Position in your hiring process.
Hiring	Start On My Behalf	Hire	Hire Employee	Use this option to delegate hiring staff, students or contingent workers.
Payroll	Start On My Behalf	Compensation	Request-One Time	Request one time payment for staff and faculty

For Business Process (inbox tasks)

○ For Business Process

[_____ ☰]

Function	Do Inbox Tasks Field	Selection	Description
Procurement	For Business Process	Expense Report Event	Use this option to delegate reviewing/approving expense request (inbox item) for regular and Lynn travel card expenses.
Procurement	For Business Process	Procurement Card Transaction Verification	Use this option to delegate reviewing/approving procurement card transactions verification (inbox item) Lynn JPM procurement P-Card (black card) expenses.
Procurement	For Business Process	Supplier Invoice Event	Approve supplier Invoice submissions.
Procurement	For Business Process	Supplier Request	Approve Supplier Request
Procurement	For Business Process	Requisition Even	Approve Requisitions or changes in requisitions
Finance	For Business Process	Budget Amendment Event	Use this option to delegate budget amendments.
Time and Attendance	For Business Process	Correct Time Off	Use this option to delegate correcting time off (inbox item)
Time and Attendance	For Business Process	Request time Off	Use this option to delegate approving absence/time off requests (inbox item)
Time and Attendance	For Business Process	Update Time Off Requests	Use this option to delegate updating absence/time off requests (inbox item)
Time and Attendance	For Business Process	Enter Time	Use this option to delegate entering time requests (inbox item)

Issues - Cannot see inbox items after delegations

Make sure you check check the box to "Retain Access to Delegated Tasks" for business processes. If you leave the box unchecked, **only** your delegate will have access to those items and they will not show on your inbox.

If you would like to see those items on your inbox, go to your delegation and click the "Retain Access to Delegates Tasks in Inbox" Under Do inbox Tasks.

Issues - My Delegation Disappeared

Delegations will disappear from your list once they reach expiration date. Make sure you extend delegations by changing the end date into a future date. Once a delegation expires it cannot be retrieved.

Issues - I Cannot find an action to delegate

Initiating Actions You Can Delegate

You can delegate the **Initiating** Action of these business processes (only):

- *Absence Calendar*
- *Background Check*
- *Change Job*
- *Change Organization Assignments for Workers by Organization*
- *Close Job Requisition*
- *Contract Contingent Worker*
- *Correct Time Off*
- *Create Idea*
- *Create Position*
- *Create Project Scenario*
- *Edit Position*
- *End Contingent Worker Contract*
- *Enter Time*
- *Expense Report Event*
- *Hire*
- *Job Requisition*
- *Job Requisition Change*
- *Personal Information Change*
- *Receipt*
- *Request Compensation Change*
- *Request One-Time Payment*
- *Request Time Off*

- *Requisition Event*
- *Spend Authorization*
- *Termination*
- *Timesheet Event*
- *Verify Capital Project Expense*