Workday Job Aid

Delegation

Use this job aid to set up and manage your Workday tasks while you are away. You may delegate your tasks to a peer or Supervisor/Manager.

**NOTE:** To delegate tasks to someone other than a peer or Supervisor/Manager, please contact the HR Tech Team at hrtechnologyteam@trinity-health.org.

To learn more about Workday, find job aids and videos at [http://workday.trinity-health.org](http://workday.trinity-health.org).

For additional assistance, contact your Tier 1 resource, as noted on the Workday Help website.
Delegation

Business Process Steps and Roles — Delegating Tasks in Workday

Process roles are designated by “security role,” which do not reflect actual job titles. People may have multiple roles.

**Delegating Tasks**

As a colleague, you may delegate your tasks to a peer or superior. You can setup this process without the intervention of a Business Process Administrator.

There are two common scenarios where a Business Process Administrator will have to set up the delegation:

- RHM’s might request delegation if a colleague goes on leave unexpectedly and is unable to set up the delegation beforehand
- To delegate to a subordinate, non-executive

Contact the HR Tech Team if you need to have delegates set up for these reasons.
hrtechnologyteam@trinity-health.org

Delegations between an Executive and their Executive Admin have to be set up by request also.

Tasks should **NOT** be delegated for more than a one-year period.

- Enter goals: Colleague
- Approve delegation: Manager

**NOTE:**
- Managers should contact Tier 1 support before reaching out to the HR Tech Team.
- Contact Tier 1 support if you have any questions about delegation.
Set Your Delegations

1. Log into Workday
2. Click the **Personal Information** worklet
3. In the **View** column, click **About Me**
4. Click the **Related Actions** button
5. Click **Business Process** and **My Delegations**
Set Your Delegations

6. Click **Manage Delegations**

7. Click in the **Begin Date** area and select a date

8. Click in the **End Date** area and select a date

9. Click the prompt icon (for choices of peers’, supervisors’ and managers’), and select the delegate’s name.

**NOTE:**
- To delegate to someone whose name does not appear in the Delegate list, contact the HR Tech Team at hrtechnologyteam@trinity-health.org
10. Select **By Business Process Type** or **All Business Processes** (enabling the Delegate to start on your behalf. Selecting **All Business Process Types** will prevent processes and approvals from being held up, allowing others to act on inbox items).

11. For **Do Inbox Tasks On My Behalf**, select either **For all Business Processes**, **For Business Process** (select a specific BP), or **None of the above**.
Set Your Delegations

12. Type a comment if needed

13. Attach a file by clicking **Select files**

14. Click **Submit**

15. Click **Done**

**NOTE:**
- When you click Submit, the delegation will be routed to the manager for approval.
Set Your Delegations

End of Process: Next Steps

WHEN YOU HAVE SUBMITTED THE DELEGATION:

- Manager receives a notification in their Inbox to approve the delegation request
View Your Delegations

Process Steps

1. Log in to Workday

2. Click the cloud icon and then click View Profile

3. Click the prompt icon and then click Business Process and My Delegations

4. Click each tab to see your delegations
Remove/Update Your Delegations

**Process Steps**

1. Log in to Workday

2. Click the **cloud icon** and then click **View Profile**

3. Click the **prompt icon** ("brick") and then click **Business Process** and **My Delegations**

4. Click **Manage Delegations**
Remove/Update Your Delegations

**Process Steps (continued)**

5. To **remove** a delegation: click the **subtract icon**

OR

To **update** a delegation: change the information within the delegate row

6. **Type comments** and click **Submit**

**NOTE:** An update will send a confirmation/review request to your manager.