



STATEWIDE PERSONNEL
— S Y S T E M —

**Delegate the
Initiation of a
Business Process**

January 2020



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Delegate the Initiation of a Business Process

How do delegations work? A worker that can initiate, approve, or perform other tasks may need (or want) to have someone else initiate or perform certain business processes. If you start business processes or tasks in Workday – such as hiring an employee, changing a position, creating new positions, etc. – you can delegate the initiation of the business process, if needed.

Delegations can be done on a one time basis, for a specific period of time. For example, if the initiator is on vacation.

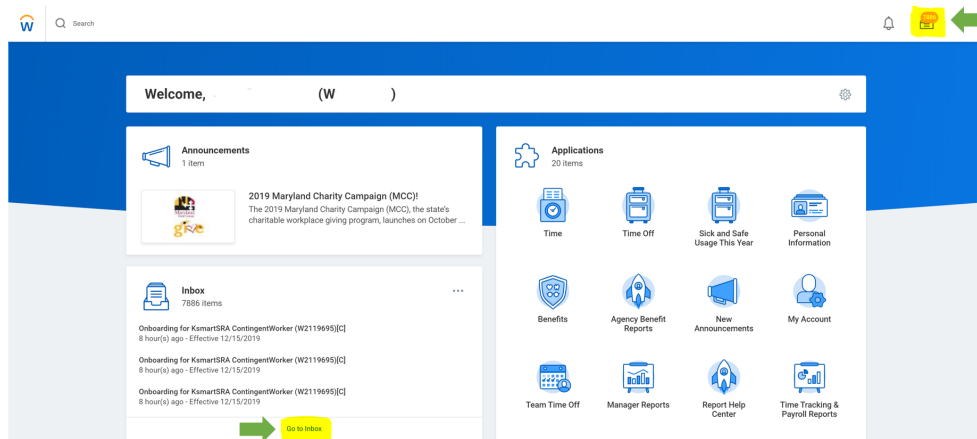
NOTE:

- If a supervisory organization has more than one person who holds some assigned roles, delegation may not be necessary as others in the unit with that role can initiate or approve as appropriate.
- When you delegate the creation of an item, you give the delegate access to all of your previously created items of that type.
- You can retain access to your inbox during the delegation period, if desired.
- Delegation begins at 12:00:01am on the Begin Date and ends at 11:59:59pm on the End Date.
- Your delegate also receives confirmation that he or she will be acting as your delegate for the specified period of time.

The procedure to delegate the initiation of tasks follow.

Procedure:

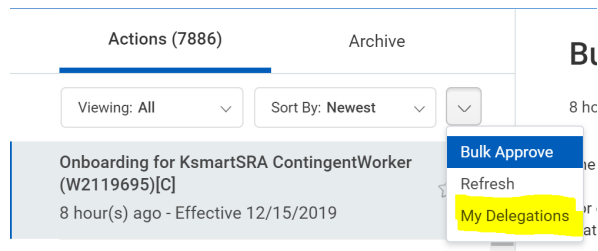
1. Navigate to your inbox from the Home Screen.



2. Click the "Go to Inbox" link or the inbox icon

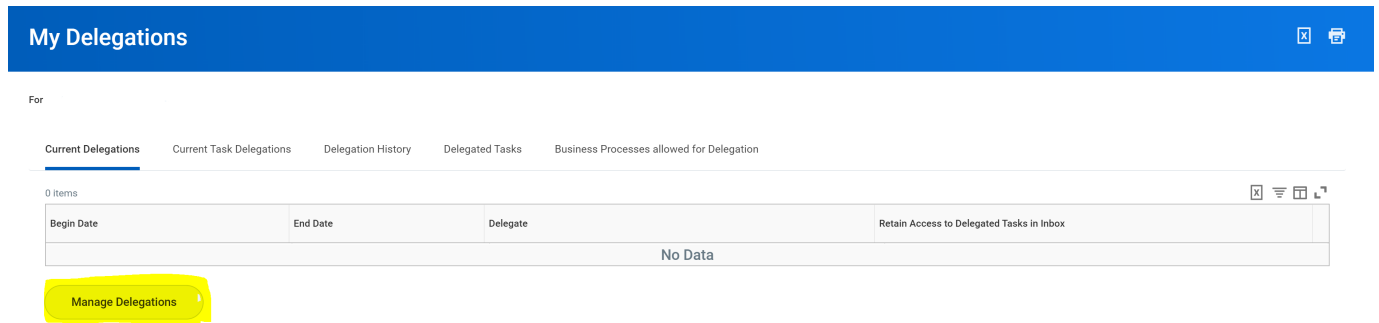


3. On the Actions tab, click the **Drop down arrow**.



4. Click the **My Delegations** option.

My Delegations



5. Click the **Manage Delegations** button.

Manage Delegations

Manage Delegations

> Business Processes allowed for Delegation

New Delegation 1 Item

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
+	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> For all Business Processes <input type="radio"/> For Business Process <input checked="" type="radio"/> None of the above <input type="checkbox"/> Retain Access to Delegated Tasks in Inbox Delegation Rule

enter your comment

- If desired, click the arrow next to the Business Processes allowed for Delegation section. View the tasks that you are allowed to delegate. > Business Processes allowed for Delegation
- Click the Calendar button to select the Begin Date.
- Click the Calendar button to select the End Date.



Information: To delegate for a single day, enter the same Begin Date and End Date.

- Type or use the prompt to select the Delegate.



Information: You can delegate tasks to your peers (e.g., other individuals that are assigned your same role within your supervisory organization) or to your superiors (e.g., individuals in your management chain).

- In the Start on My Behalf field, use the search prompt to choose the tasks that the Delegate will initiate on your behalf.
- To retain access to your inbox during the delegation period, click the Retain Access to Delegated Tasks in Inbox checkbox.
- Take note of the Alert that displays. Note that when you delegate the creation of an item, you give the delegate access to all of your previously created items of that type.

Alert

1. [New Delegation \(Row 1\)](#)

When you delegate the creation of an item, you give the delegate access to all of your previously created items of that type.

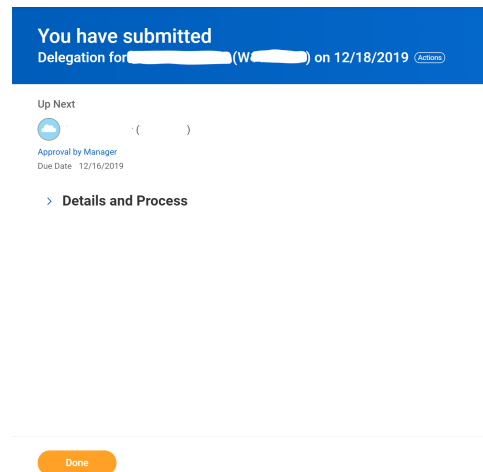
- To add more delegations, click the Add a New Row  icon and enter the delegation details.
- Click the **Submit**  button.



Tip: If you do not want to submit the request at this point, you can also click one of the following buttons:

- Click **Save for Later** to save your changes but not submit
- Click **Cancel** to cancel the process and start at another time

Manage Delegations



The screenshot shows a blue notification box with the text: "You have submitted Delegation for [redacted] (W [redacted]) on 12/18/2019" with a small "Actions" link. Below this, it says "Up Next" followed by a circular arrow icon and "()". Underneath, it reads "Approval by Manager" and "Due Date 12/16/2019". A link "> Details and Process" is visible. At the bottom of the notification area is an orange "Done" button.

15. Click the **Done**  button.



Information:

- The task has been delegated. Some delegated tasks require approval by a manager which will be the next step in the process.
- Delegation requests can be updated or canceled at a later time, if needed. See the *Update or Cancel a Delegation Request* guide for details.

16. The System Task is complete.