LMU Workday | Delegations

Delegation allows you to give another individual the ability to temporarily initiate business processes on your behalf, or take actions on your Inbox tasks. Delegations are appropriate when the original task owner is out on vacation, sick, absent, etc.

What Tasks Can I Delegate in Workday?

Action	Can I Delegate?
Budget amendments	Yes
Business title change	Yes
Cash sale initiation (Cashier Deposits)	Yes
Create position	Yes
Compensation (change for existing or new hire)	No
Expense reports	Yes
Job requisitions (create, approve, edit, close)	Yes
One-time payment (add)	Yes
Period activity pay (add and adjust)	Yes
Personal information (preferred name, photo)	Yes
Requisitions	Yes
Spend authorizations	Yes
Termination	Yes
Timesheets (approval)	No **Please refer to FAQ section below.

Frequently Asked Questions

Can I delegate timesheet approvals while I'm out of the office?**

Delegations may occur *only* as a temporary reassignment when you are out on vacation, leave, etc. However, compensation business processes can never be delegated.

How long does a delegation last?

You may specify a beginning and end date for a delegation period. At maximum, delegations expire 6 months from the date of creation.

Is delegation the same as reassignment?

No. Reassignment permanently removes responsibility for a task from one person, and reassigns it to another. Delegation does not remove responsibility (ownership) for the task from you, as the original task owner; it simply enables another individual to perform tasks on your behalf.

Does my supervisor need to approve my delegation?

Yes. All delegation requests are subject to approval by your supervisor or Chair/Dean where appropriate.

I have staff who are Department Finance Specialists (Workday role). Do I still need to delegate to them?

No. Individuals designated as DFS can assist with the creation and submission of expense reports, requisitions, and authorizations on another's behalf, without the need for an official delegation.

Will my appointed delegate be able to see my personal information?

No. Delegation only provides access to the action in question. Appointed delegates cannot see any info outside of that action.

Will my appointed delegate be able to see the history of the business process in question?

Yes. When you delegate the creation of an item, your delegate has access to all of your history for that item. For ex. if you delegate the creation of expense reports, your delegate can copy all of your existing expense reports.

Can my appointed delegate complete a process if they are the subject of it?

No. Business processes delegated to another individual will not trigger to the delegate, if the delegate is the subject of the business process. Instead, the process will trigger to an alternate delegate, which defaults to your (the delegator's) supervisor. Please speak with your supervisor and the individuals you intend to delegate processes to, in order to clarify expectations.

Can my delegate refuse their appointment?

Delegates can request reassignment for any delegated tasks, but they cannot delegate the tasks to another worker themselves.

Will my appointed delegate be able to access another service, as part of their delegation?

No. Workday excludes a delegated process from access to certain Workday functionality that requires connecting to another service, such as: background conversions, business form printing, integrations (including Reports as a Service, REST API, and Workday Studio), scheduled reports, document access on My Reports, and others.

Can I view reports related to delegation?

Yes. Workday has a series of reports available, including:

Report	Considerations
Business Processes for Delegation	View a list of processes that are enabled for delegation.
Business Process Tasks Not Delegated	View tasks that Workday does not delegate, due to routing restrictions.
Manage Delegation Settings	View current or past delegations for an individual. You can also view which processes allow for delegation.
My Delegations	View completed tasks from the delegating user's point of view
View All Delegated Tasks	View a list of tasks that you, as a delegate, can perform on behalf of the original delegating user.
View and Maintain Notifications	View a list of notifications for the delegating user, sent during the time that the delegation is in effect.
View More Processes	View a list of delegated business processes and who took action on your behalf.
View My Delegation Assignments	View all the business process initiation steps that others have delegated to you.