workday. | VUMC BUSINESS EDUCATION

Delegation of Business Processes and Inbox Items

Workday allows VUMC employees to temporarily delegate business processes to others within their Supervisory Organization when they are unable to complete those processes. Delegation is a temporary setting which cannot exceed <u>16 Weeks</u> in length. employees can choose to delegate certain allowed tasks to peers or superiors without approval, and subordinates with approval. Follow the steps below to delegate a business process to another employee.

From the Home Page:

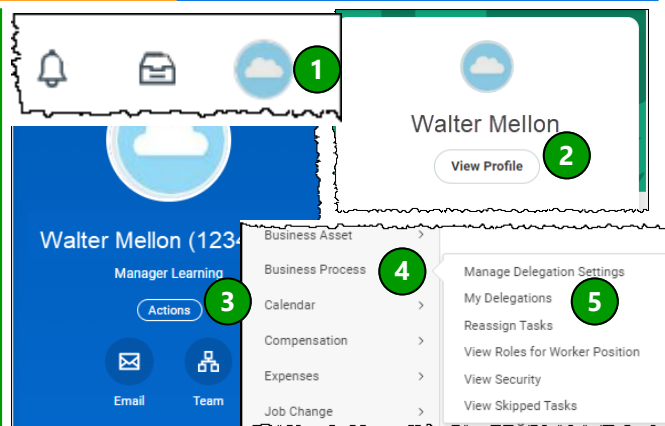1. Select your **Profile Icon or Image**.

2. Select **View Profile**.

3. Select **Actions.**

4. Select **Business Process.**

5. Select **My Delegations.**
Note: You can also type **My Delegations** into the search bar to find this item.

From My Delegations:

1. Select **Manage Delegations**.

2. Select a **Begin Date and End Date** for the delegation by clicking on each box. **Note:** A delegation period cannot be longer than 16 weeks.

3. Select a **Delegate** by choosing the **prompt button**.

4. A drop-down menu will appear giving you the option to choose a Peer, a Superior or a Subordinate within your Supervisory Organization as your delegate. Select the **appropriate option**.
Note: You must receive approval to delegate to a subordinate.

5. Select the **person** you wish to be a delegate.

6. Select the task(s) for the delegate to start on your behalf by choosing the **prompt button**. **Note:** only certain business processes will be allowed for delegation based on an employee's role.

7. Choose whether you would like to search for a **specific task, browse by Business Process Type, or browse All.**
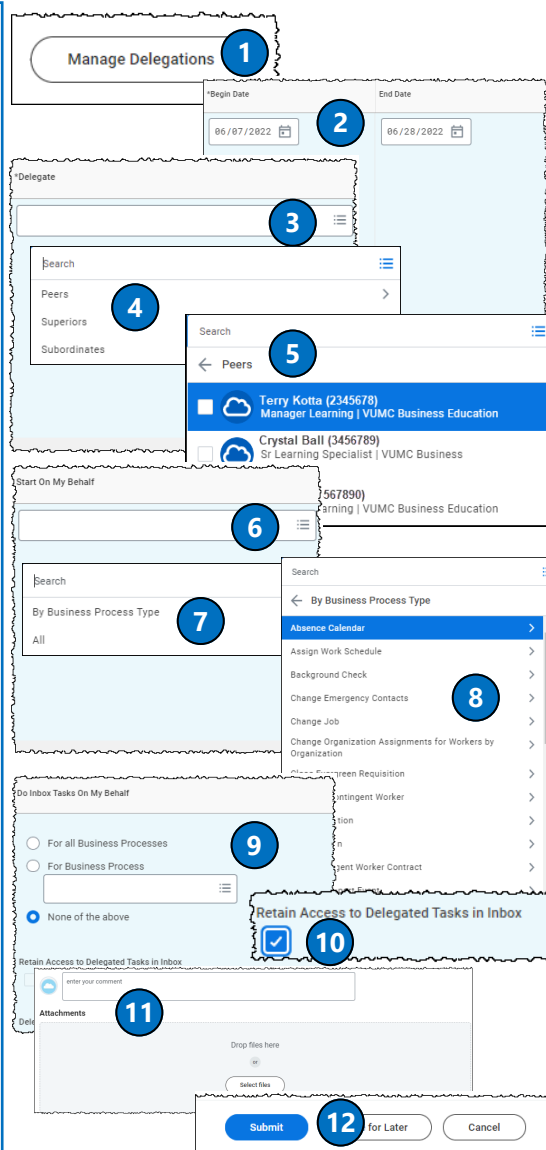
8. A drop-down menu will appear, dependent on your choice above. Choose the **appropriate business process type** for this delegation.

9. Choose which **business processes** the delegate should manage.

10. Select the Check Box next to **Retain Access to Delegated Tasks in Inbox**.

11. You can write an optional comment or add an optional file.

12. Select **Submit**.

# Delegation of Individual Tasks from Inbox

Workday allows users to delegate individual tasks from their inbox. Follow the steps below to delegate an individual task using the inbox.

From the Home Page:

1. Select the **Inbox Icon**.

2. Select the **inbox item** that you would like to delegate.

Note: Not all inbox tasks can be delegated. Search for "Business Processes for Delegation" to see a complete list of all business processes that are enabled for delegation.

3. Select the **Gear Icon**.
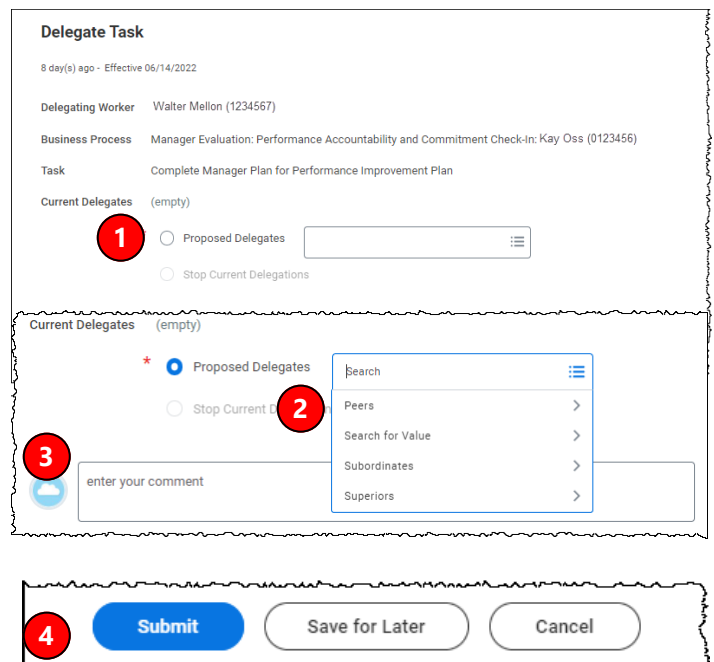
4. Select **Delegate Task.**
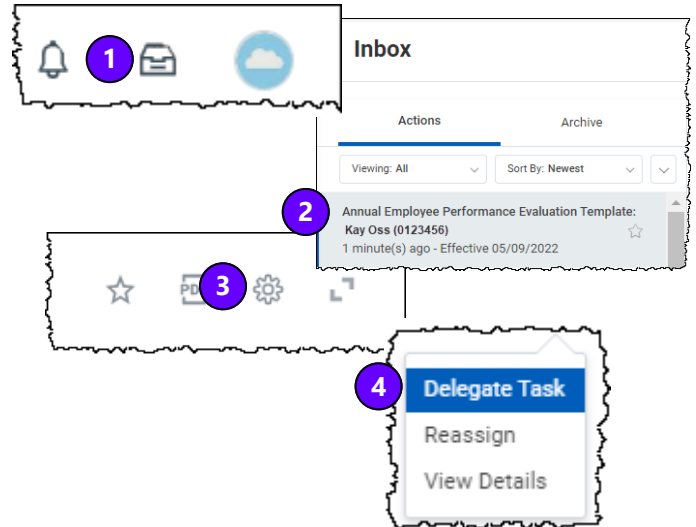
From Delegate Task:

1. Select **Proposed Delegates**.

2. Select the **Appropriate Option** between Peers, Subordinates or Superiors within your Supervisory Organization, or you can search for a specific person.

Note: You must receive approval to delegate a subordinate.

3. You can enter in an **Optional Comment**.

4. Select **Submit**.

To view VUMC's Delegation Policy in Policy Tech, click here.

QUESTIONS?

Please email BusinessEducation@vumc.org.