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 **16 Weeks** 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. Type **My Delegations** to the search bar.

2. Select the **My Delegations Report.**

Q My Delegations ①

▤ My Delegations ②
   Report

▤ View My Delegation Assignments
   Report
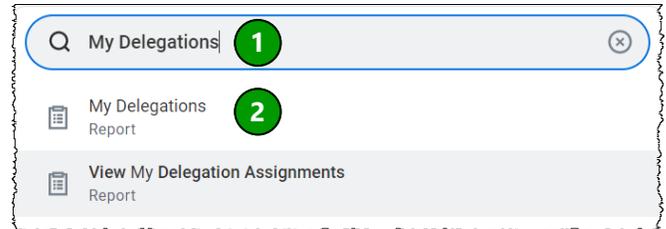
From My Delegations:

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 icon**.

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 your delegate.

6. Select the task(s) for the delegate to start on your behalf by choosing the **prompt icon**.
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** and select the appropriate **business process** to delegate as Start on my Behalf.

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

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

10. Under **Delegate Rule**, select the prompt icon. A dropdown menu will appear, select the **Do NOT Delegate if Subject = Delegate (Multi)** option.

11. You can write an optional **comment** or attach an optional **file**.

12. Select **Submit**.

Manage Delegations ①   gation 1 item

② ***Begin Date** ②   End Date

⊝ 06/12/2023   06/29/2023

*Delegate ②

Search ③
Peers >
Superiors > ④
Subordinates >

Search
← Peers ⑤
☐ ☁ **Terry Kotta (2345678)**
   Manager Learning | VUMC Business Education
☐ ☁ Crystal Ball (3456789)
   Sr Learning Specialist | VUMC Business Education
☐ ☁ Joe King (4567890)
   Manager Learning | VUMC Business Education

Start On My Behalf ②

Search ⑥
By Business Process Type >
All ⑦

Do Inbox Tasks On My Behalf ②

⦿ For all Business Processes ⑧
◯ For Business Process
   [   ]
◯ None of the above

Retain Access to Delegated Tasks in Inbox
☑ ⑨

Delegation Rule
[   ]

☐ Do NOT Delegate if Subject = Delegate
☐ Do NOT Delegate if Subject = Delegate (Multi) ⑩
☐ Do Not Delegate if Subject or Initiator
Search

☁ enter your comment ⑪
Attachments
   Drop files here
      or
   Select files

Submit ⑫   ave for Later   Cancel

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.**
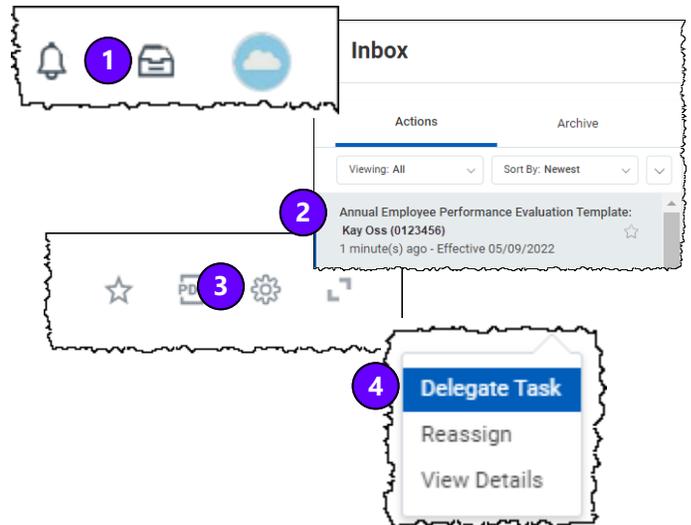
From Delegate Task:

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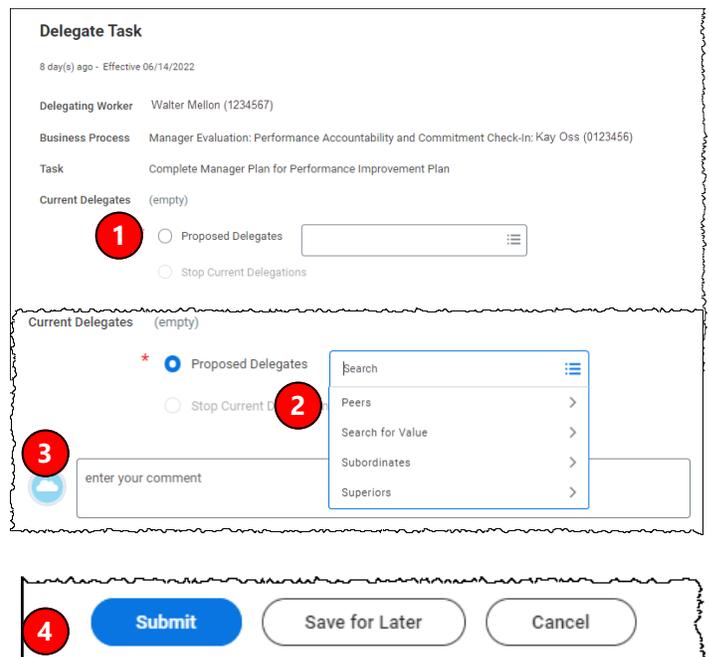
To view VUMC's Delegation Policy in Policy Tech, click here.

QUESTIONS?

Please email BusinessEducation@vumc.org.

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