
This job aid explores how security concepts apply in Workday, by exploring these important questions:

- **What security concepts are important to understand?** Access, inheritance, and delegation are especially important.
- **How do access, inheritance, and delegation work?** This section walks you through each of the three important security concepts.

The rest of this document explores, in more detail, the questions above.

**What security concepts are important to understand?**

These three security concepts are especially important:

**How do access, inheritance, and delegation work?**

<table>
<thead>
<tr>
<th>Access</th>
<th>Inheritance</th>
<th>Delegation</th>
</tr>
</thead>
</table>
| • Certain roles should be able to view information, initiate business processes, and do other work within Workday.  
• Can you see what you should see?  
• Is anything missing? | • Ownership of an organization or business process must transfer when the current holder of the role leaves that role: e.g., when the worker is terminated, gets transferred, or is on leave. | • Employees who have the role of management partner (and other roles) may need to delegate business processes when they are away or cannot perform the processes for some reason. |

To illustrate how the security concepts work, this section explores examples of inheritance, access, and delegation.

**Access**

Those who use Workday will need appropriate access to do their jobs, and so as a user, you should ensure that you can see what you need to see and do what you need to do in order to perform the tasks (business processes) that you performed before Workday.
Inheritance

Inheritance applies to supervisory organizations, assigned roles, and business processes. Figure 1 illustrates the concept as it applies to an example: the HR generalist is terminated.

- **The HR generalist is terminated**: When the HR generalist is terminated, the supervisory organization (i.e., the unit in which the HR generalist was manager) is without an owner, and so someone else must become responsible for the organization and employees within that organization. (*Note: if the HR generalist had also had an assigned role, such as HR partner, that role would also need someone else to be responsible for the role.*)

Through inheritance, the person in the HR-services role (i.e., the person who supervised the HR generalist) would get the supervisory organization and employees that the HR generalist had. If the HR generalist also had an assigned role (e.g., HR partner), that role would not necessarily go to the HR-services role—unless the person in the HR-services role also had the HR partner role. Instead, the HR partner role will move up the organization until it finds the next person who has the HR-partner role: that person would get the HR generalist’s responsibility to review and approve business processes that used to come to the now-terminated HR generalist.

- **The HR comp generalist submits a time-off request (TOR)**: When the HR comp generalist enters a TOR in Workday, inheritance security-rules should route that TOR to the HR-services person who inherited the HR generalists supervisory organization and employees. As a result, any business processes (such as a TOR) that would have gone to the HR generalist will now go to the person in the HR-services role.

Delegation

A person who has a role such as management partner, HR partner, finance partner, or other role that initiates or approves business processes may need (or want) to have someone else initiate or approve certain business processes: e.g., when the person with a particular role has an ongoing need to have another person in the unit initiate one (or more) business process(es) and, potentially, when the person with the role is on vacation or will be unable to access Workday for a set period of time. (*Note: Many units will likely have more than one person who holds the same assigned roles, and so in those units, delegation may not be the method that works best for their work. Instead, those units with multiple people in the same role would not have to delegate when one person with a role goes out on vacation, since the other(s) with that role can initiate or approve as appropriate.*)

In those cases when a person with an assigned role needs (or wants) to delegate, that person may delegate her tasks to another person, by following these steps:
1. Select the related actions button ▼ next to your name

2. Click on manage delegations

3. Enter the appropriate information

   - Enter a begin and end date.
   - Select a person (or more than one person) to whom you will delegate.
   - Determine whether you want to either delegate your ability to initiate business processes AND to complete tasks in your inbox or just delegate either your ability to initiate OR the ability to complete tasks in your inbox. (Note: you do not have to delegate both the ability to initiate and the ability to complete tasks in your inbox: you can delegate both abilities or just one of those abilities.)
   - Click on the prompt in the “Start On My Behalf” field if you want to allow the person(s) to whom you delegate the ability to initiate one (or more) business process(es) on your behalf. Select one business process (BP) by clicking on the name of the process; then, to add another BP to the list, again click the prompt button and select another BP—repeat as necessary, until you have an appropriate list of the BPs you want to delegate.

   ![Image of business processes allowed for delegation]

   - Click on the options in the “Do Inbox Tasks On My Behalf” if you want to allow the person to whom you are delegating the ability to see and act on any tasks that appear in your inbox. You can allow your chosen delegate to see all business processes that come to your inbox or a specific set of BPs—or no BPs at all. Typically, you will also want to check the box that allows you to retain access to delegated tasks in your inbox, since you might want to still complete some tasks, even though your delegate could do them for you.

4. Review your entries

To make sure that your entries are correct, always take a moment to review what you entered—a few seconds of your time now may save you (and others) many minutes or hours of time later.
5. Submit your work

6. Await approval from your supervisor

   Before the delegation is active, your supervisor will need to review and approve what you delegated.

7. Cancel or modify the delegation, if you desire to do so.

   Once you submit the delegation, you may find that you want to cancel or modify the delegation, but the way in which you proceed depends on whether your supervisor has approved your delegation:

   - **Approved:** For approved delegations, you can modify the dates, tasks, and other information, or you can add new delegates or remove delegates. Simply, click on your name, select “Business Process,” click on "My Delegations," and click the “Manage Delegations” button on the next page. Modify the delegation as you like, and submit it again for approval. If you need to completely delete the delegation, submit a ticket through the REMEDY help-request system.

   - **Not yet approved:** Click on your name, select the related actions icon near your name, click on “Business Process”, and click on “My Delegations.” Click on manage delegations, and you will see the delegation that you started (it will still be in progress). Click on the related actions icon to the left of the delegation request, select the business process option, and click cancel.