

Delegation Overview

BEFORE YOU DELEGATE...

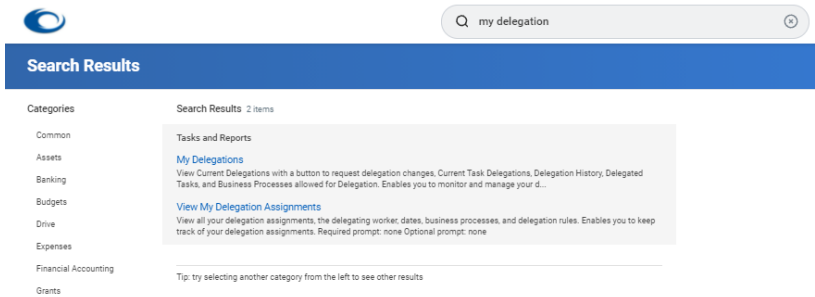
Delegation is the temporary assignment of another person to act on your behalf to carry out specific activities. **Workday** allows you to **Delegate** your Workday **Inbox** or specific tasks from your **Inbox** (such as approvals), or the ability to initiate actions for business processes. A **Delegation** should be made on a temporary basis and have a specific end date of no longer than 180 days. All requests for **Delegation** will go through an approval process; your immediate supervisor will approve your Delegations.

NOTE: Delegation should only be used when you will be unavailable to complete time-sensitive tasks. Inboxes contain HR-related tasks that may contain salary or other personal information; delegating your entire **Inbox** should be done only when you will be unavailable for an extended period of time, and the **Delegate** should be a person (peer or supervisor) who already has access to the same information you do.

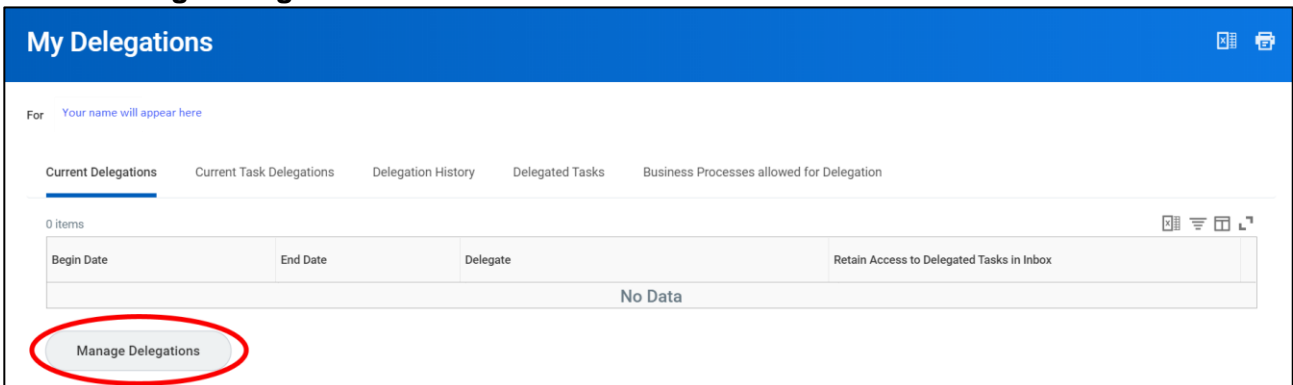
PRIOR TO DELEGATING, it is important that you inform your selected Delegate of your intended action!

SET UP DELEGATION(S)

1. From the **Workday Home Page**, enter **My Delegations** in the *Search* bar and select the **My Delegations Report** from the search results.



2. Select **Manage Delegations**.



- Enter a **Begin & End Date** for the **Delegation**. For example, this would be the anticipated/planned date range you will be out of the office. **IMPORTANT: This time range cannot be longer than 180 days in duration.**

The screenshot shows the 'New Delegation' form with the following fields:

- *Begin Date: MM/DD/YYYY (highlighted with a red box)
- End Date: MM/DD/YYYY (highlighted with a red box)
- *Delegate: (empty)
- Start On My Behalf: (empty)
- Do Inbox Tasks On My Behalf: Radio buttons for 'For all Business Processes', 'For Business Process', and 'None of the above' (selected).
- Retain Access to Delegated Tasks in Inbox: (unchecked)
- Delegation Rule: (empty)

- Select the name of the **Delegate** (person performing the tasks on your behalf); type the person's name in the field for quick results.

The screenshot shows the 'New Delegation' form with the following fields:

- *Begin Date: 06/22/2020
- End Date: 06/24/2020
- *Delegate: Delegate * (highlighted with a red box) containing 'Ms. Mary Louise Berzak ...'
- Use Default Alternate: (unchecked)
- Alternate Delegate *: Search (empty)
- Do Inbox Tasks On My Behalf: Radio buttons for 'For all Business Processes', 'For Business Process', and 'None of the above' (selected).
- Retain Access to Delegated Tasks in Inbox: (unchecked)
- Delegation Rule: (empty)

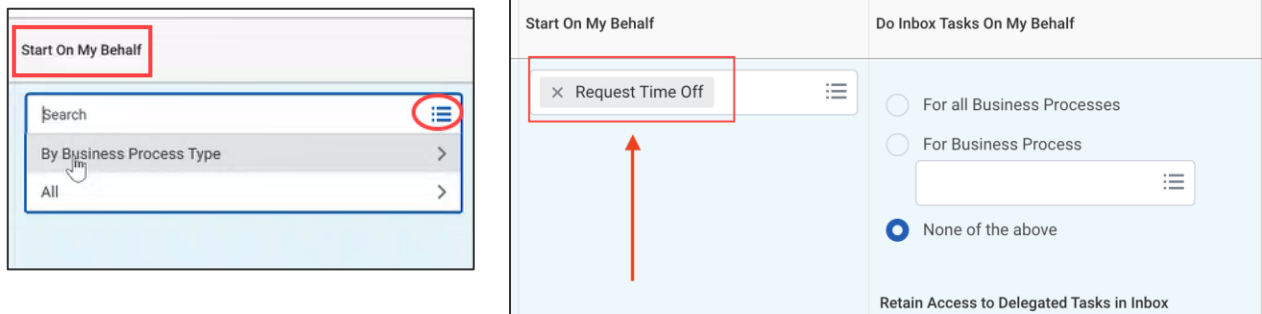
- If it does not default to selected, check the **Use Default Alternate** box to automatically designate an **Alternate Delegate**. The **Alternate Delegate** comes into play when an item that has been delegated involves the person named as **Delegate**. For example, if approving Time Off has been delegated, the **Delegate** cannot approve their own **Time Off Request**, so that item would be routed to the **Default Alternate Delegate**. The **Delegate's** immediate supervisor will automatically be assigned as the **Default Alternate Delegate**.

***NOTE:** If you wish to assign someone else as **Alternate Delegate**, leave the **Use Default Alternate** box *unchecked* and manually enter the name of your selected **Alternate Delegate**.

This close-up shows the 'Use Default Alternate' checkbox checked, with the 'Alternate Delegate' field populated with 'Ms. Patricia A O'Connor-Benson'.

This close-up shows the 'Use Default Alternate' checkbox unchecked (circled in red) and the 'Alternate Delegate' field highlighted with a red box, indicating where to manually enter a name.

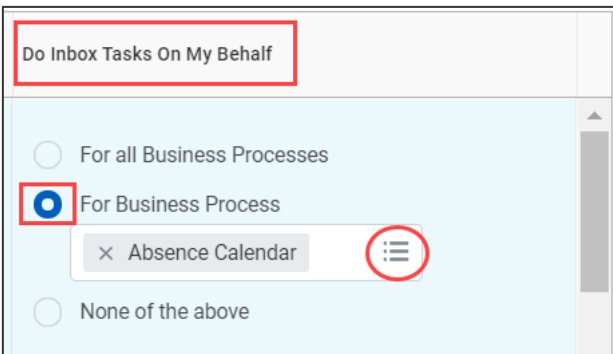
- To allow the **Delegate** to *intiate business processes* on your behalf, (such as creating an **Expense Report** or entering **Time Off**) choose the **Start on My Behalf** menu and select the desired option(s).



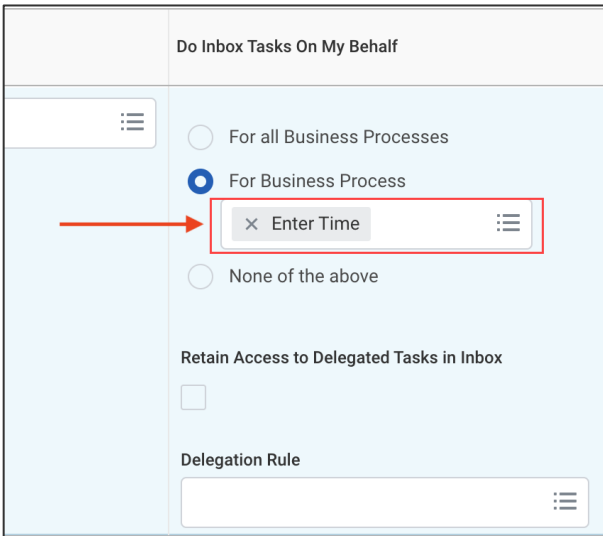
- To delegate **Inbox** tasks, such as approvals, choose the specific **Business Processes** the **Delegate** can act on directly from your **Workday Inbox**, or select **For All Business Processes**.

***NOTE:** If **Start On My Behalf** is selected, you must also stipulate the same **Business Process** in the **Do Inbox Tasks On My Behalf** section, to allow action on initiated items, if necessary.

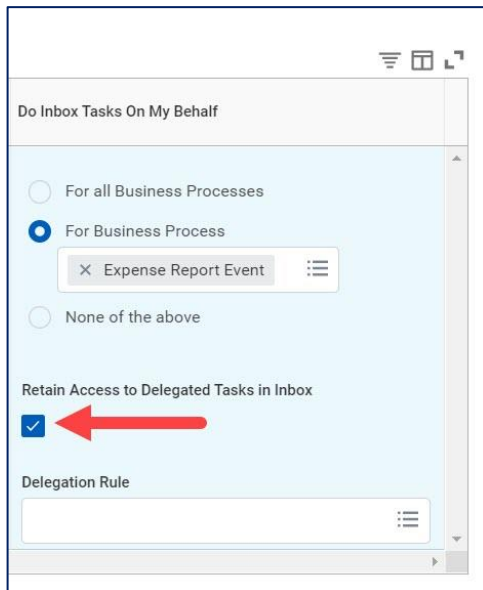
To select a specific **Business Process**, use the menu option and select from the resulting list (Module or All), or type the name of the process in the field and select from the results- for example, **Absence Calendar**.



***NOTE:** When delegating **Time Entry** approval you are actually delegating **Inbox** tasks for the **Enter Time Business Process**; **Time Entry Approval** is a step within that **Business Process**, so you would choose **Enter Time** as the **Business Process** (see screenshot below)



8. Check the **Retain Access to Delegated Tasks in Inbox**. This is *required* to be checked and allows you to manage **Inbox** items during the delegation period, should you choose to. Items will appear in your **Inbox** as well as that of the **Delegate**. If the **Delegate** completes the task, it will move from the **Actions** tab to the **Archive** tab in both **Inboxes**.

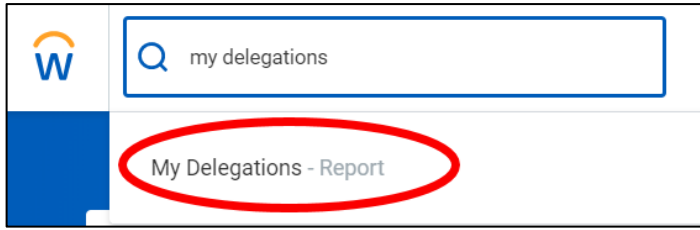


9. Click **Submit**.

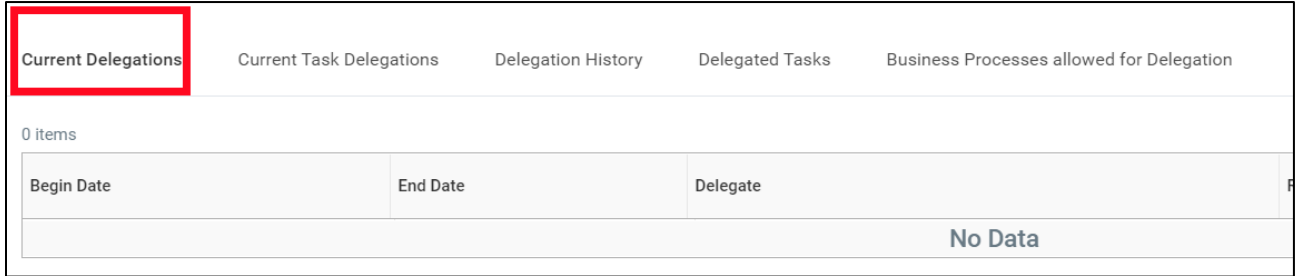
NOTE: The **Delegation request requires approval by your immediate supervisor or manager*

VIEW DELEGATIONS

1. From the **Workday Home Page**, enter **My Delegations** in the *Search* bar and select **My Delegations Report** from the search results.



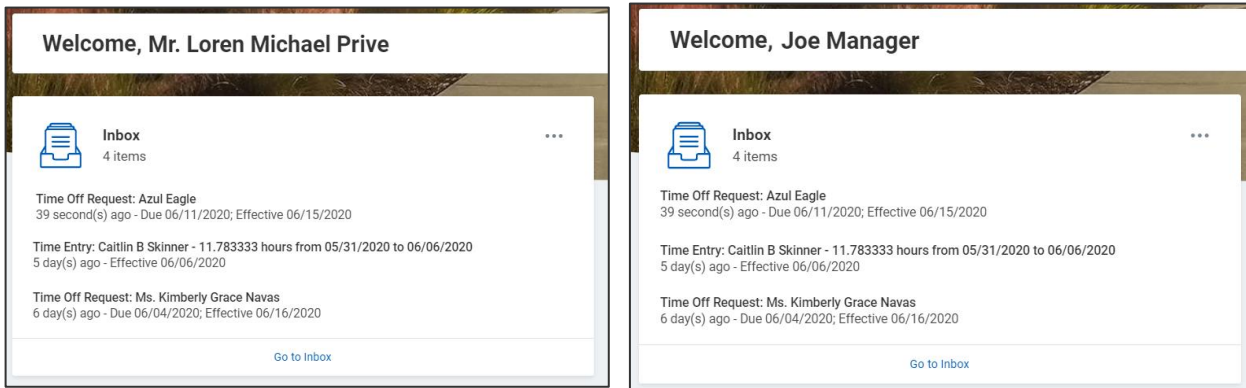
2. Select **Current Delegations** tab.



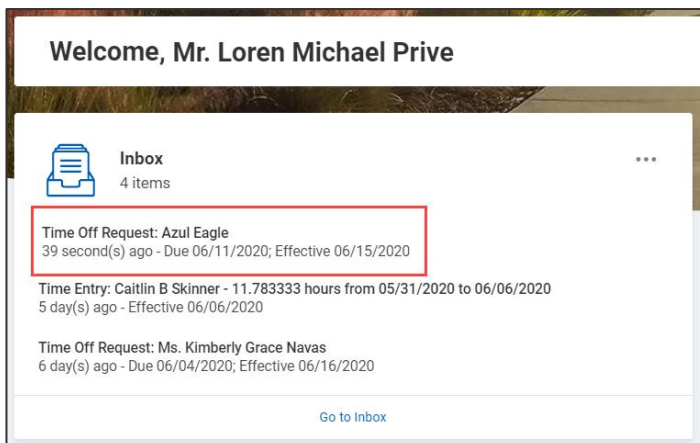
ACTING AS A DELEGATE

INBOX TASKS

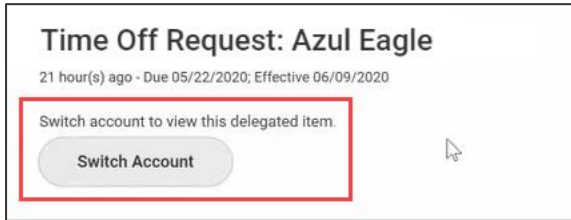
When **Workday** tasks/processes have been delegated to you for action, they will appear in your **Inbox Actions** tab, just as they appear to the **Delegator**.



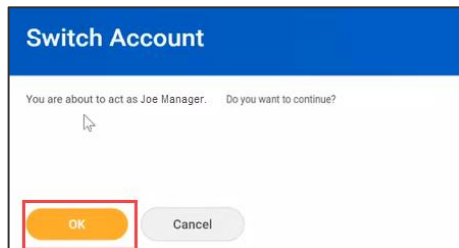
1. Select the **Inbox** item you wish to act upon (either from the **Inbox** card or your open **Inbox**),



2. In the open item, click the **Switch Account** button



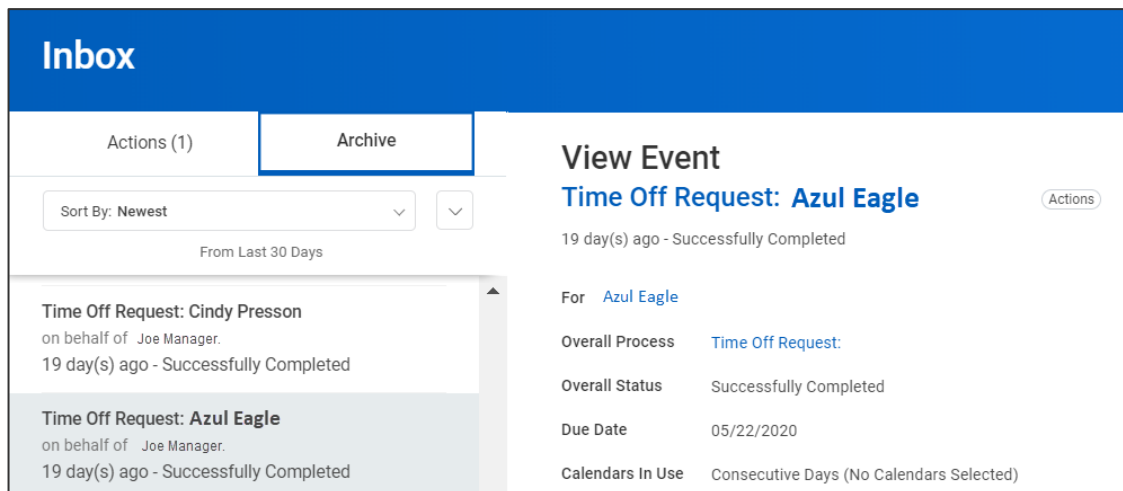
3. The **Switch Account** confirmation screen displays; select **OK**



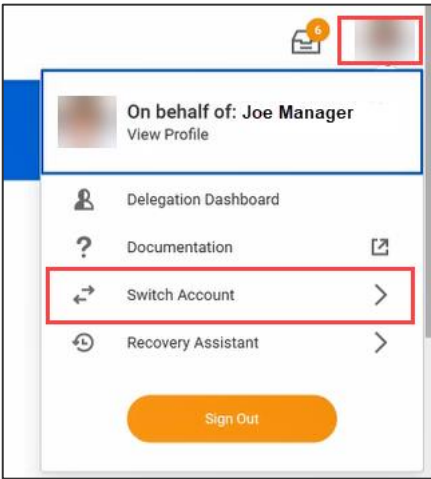
4. The **Delegation Dashboard** appears; from here you may access the **Delegator's Inbox** (acting on behalf of the **Delegator**)



5. Items in the **Inbox** may then be acted upon; once action has been taken, the item will move to the **Archive** tab in both the **Delegate's** and **Delegator's** Inbox.



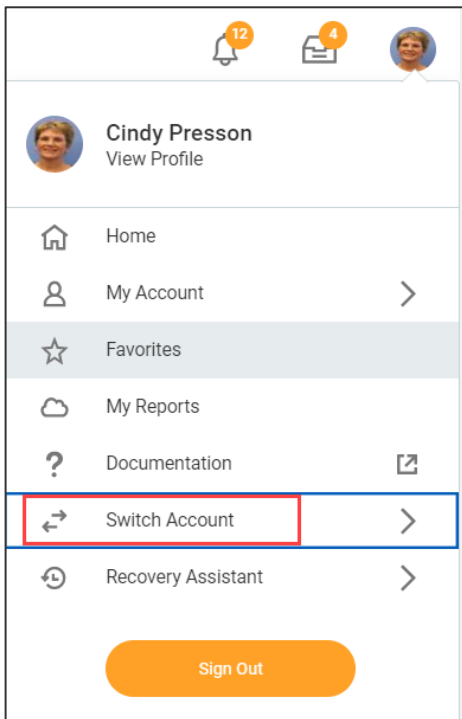
6. To return to your own **Workday** account, click the **Delegator's** profile picture and select **Switch Account**



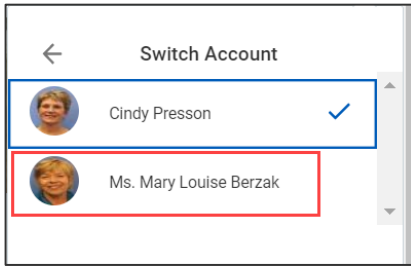
INITIATING A BUSINESS PROCESS AS A DELEGATE (“START ON MY BEHALF”)

When you have been delegated to initiate a **Business Process** (“**Start On My Behalf**” has been selected for the **Delegation**):

1. On the **Workday Home Page**, click your **Profile picture** and select **Switch Account**



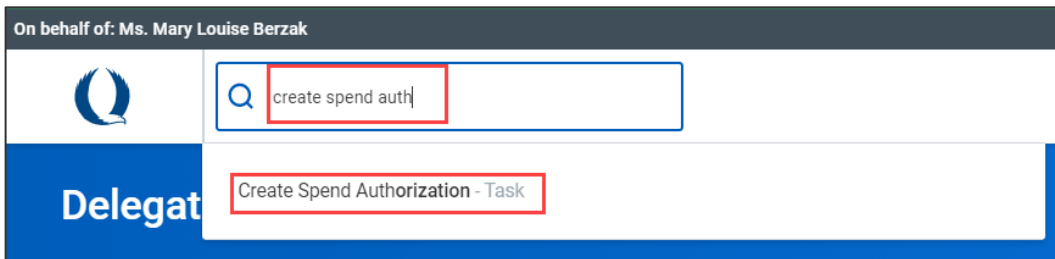
2. From the options displayed, select the person you wish to act **On Behalf Of**



3. The **Delegation Dashboard** appears, displaying the **Delegator's Profile** picture and a notice that you are now acting **On Behalf Of** that person



4. Proceed with initiation of the delegated **Business Process**



***NOTE:** If an initiated item is returned for further action or revision during the approval process, it will appear in the **Delegate's Inbox** as well as the **Delegator's**, for the duration of the **Delegation** period.