



# 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.

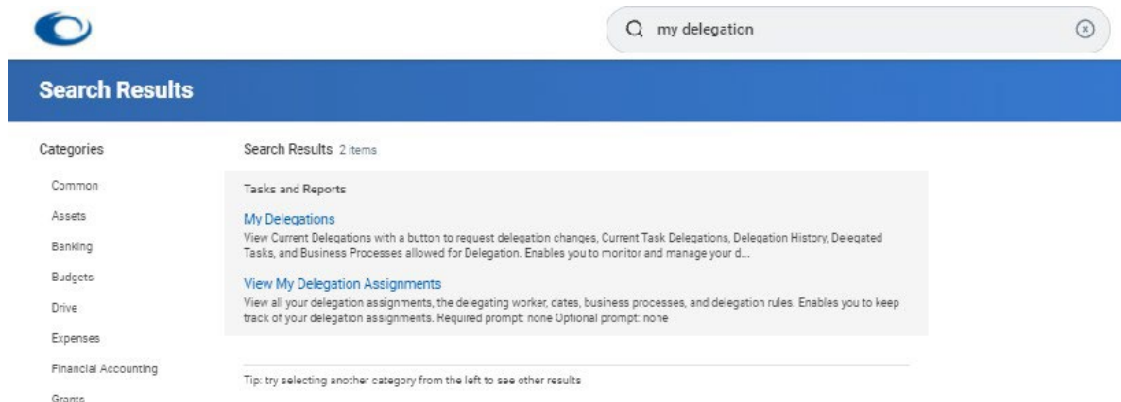


*Note: **Delegation** should only be used when you will be unavailable to complete time-sensitive tasks. Inboxes contain HR- related tasks that may contain salary or other personal information; delegating your entire **Inbox** should be done only when you will be unavailable for an extended period of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

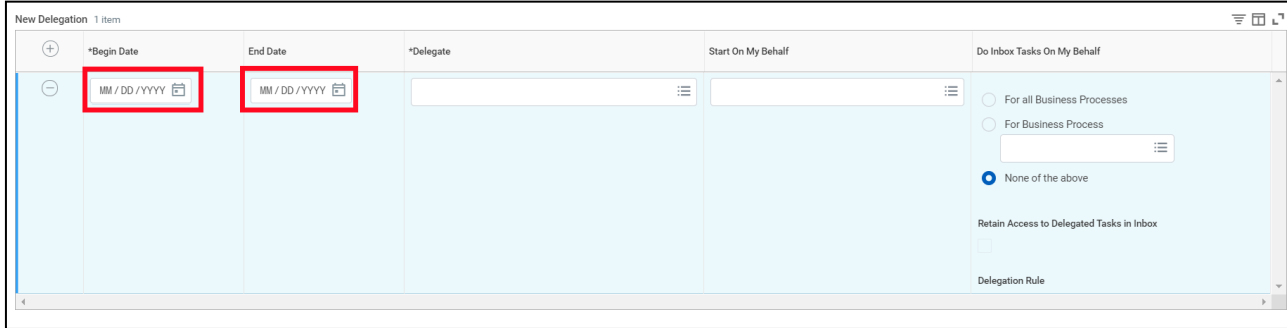
***PRIOR TO DELEGATING, it is important that you inform your selected Delegate of your intended action!***

# SET UP DELEGATION(S)

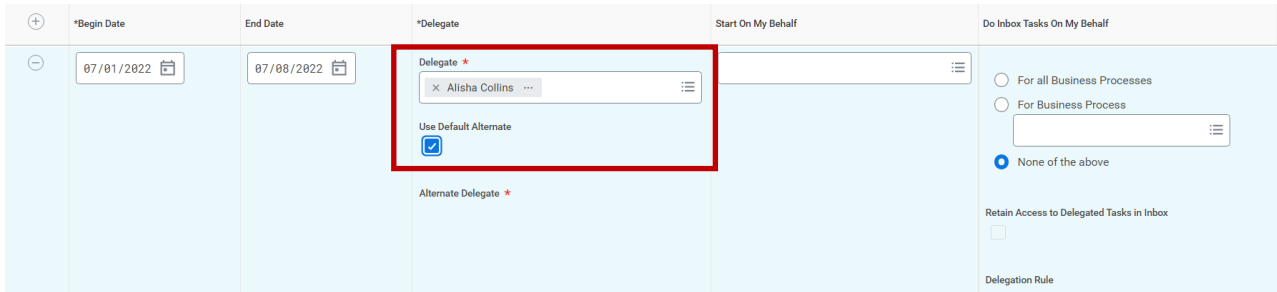
1. From the **Workday Home Page**, enter **My Delegations** in the *Search* bar and select the **My Delegations Report** from the search results.



2. Select **Manage Delegations**.
3. 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.**

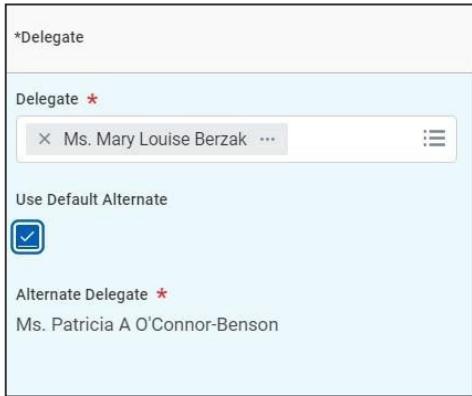


4. Type the name of the **Delegate** (person performing the tasks on your behalf); The **Use Default Alternate** will auto check, leave as is



5. 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**.

- 6. **\*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**.



\*Delegate

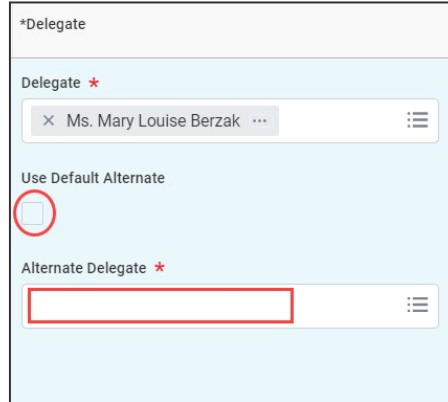
Delegate \*

Ms. Mary Louise Berzak ...

Use Default Alternate

Alternate Delegate \*

Ms. Patricia A O'Connor-Benson



\*Delegate

Delegate \*

Ms. Mary Louise Berzak ...

Use Default Alternate

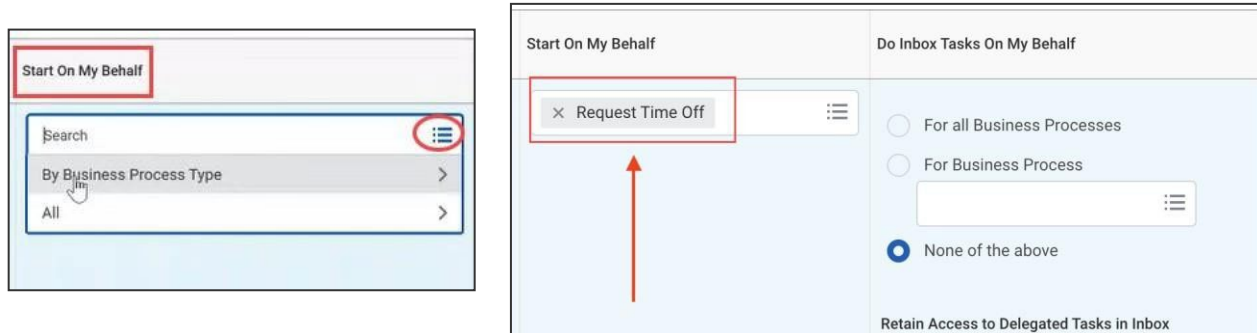
Alternate Delegate \*

[Empty text box highlighted with a red border]

*unchecked* and manually enter the name of your selected **Alternate Delegate**.

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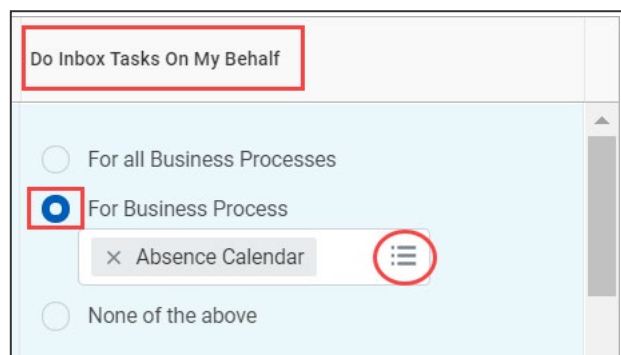
- To allow the **Delegate** to *initiate business processes* on your behalf, (such as creating an **Expense Report** or entering **Time Off**) choose the **Start on My Behalf** menu and select the desired option(s). Ex. Request Time Off or Review Time



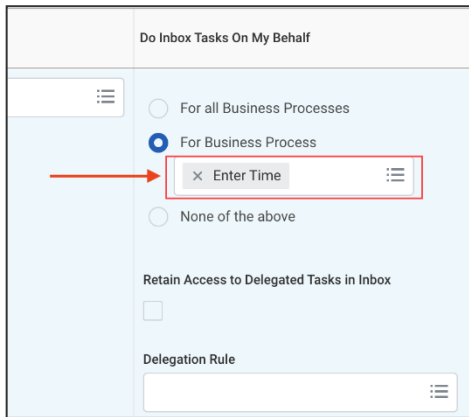
- To delegate **Inbox** tasks, such as approvals, choose the specific **Business Processes** the **Delegate** can act on directly from your **Workday Inbox**, or select **For All Business Processes**.

**\*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.

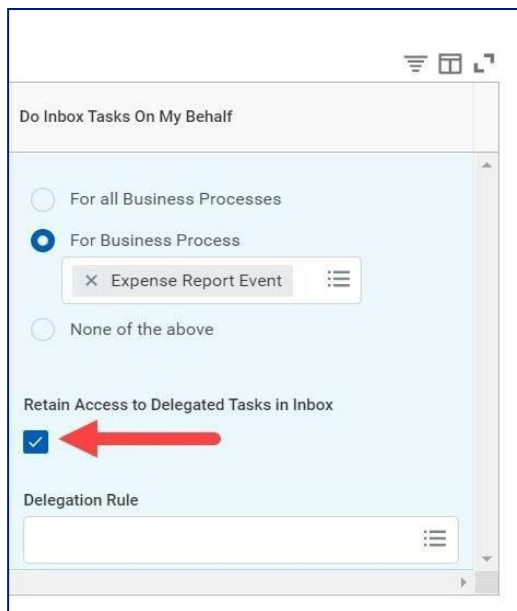
To select a specific **Business Process**, use the menu option and select from the resulting list (Module or All), or type the name of the process in the field and select from the results- for example, **Absence Calendar**.



**\*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)



9. 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**.

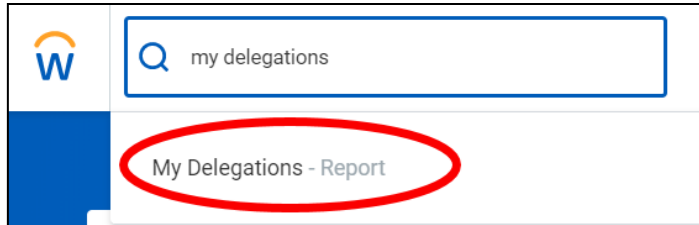


10. Click **Submit**.

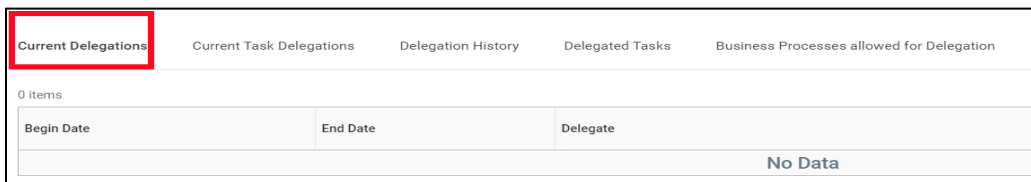
**\*NOTE:** The **Delegation** request requires approval by your immediate supervisor or manager

## VIEW DELEGATIONS

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



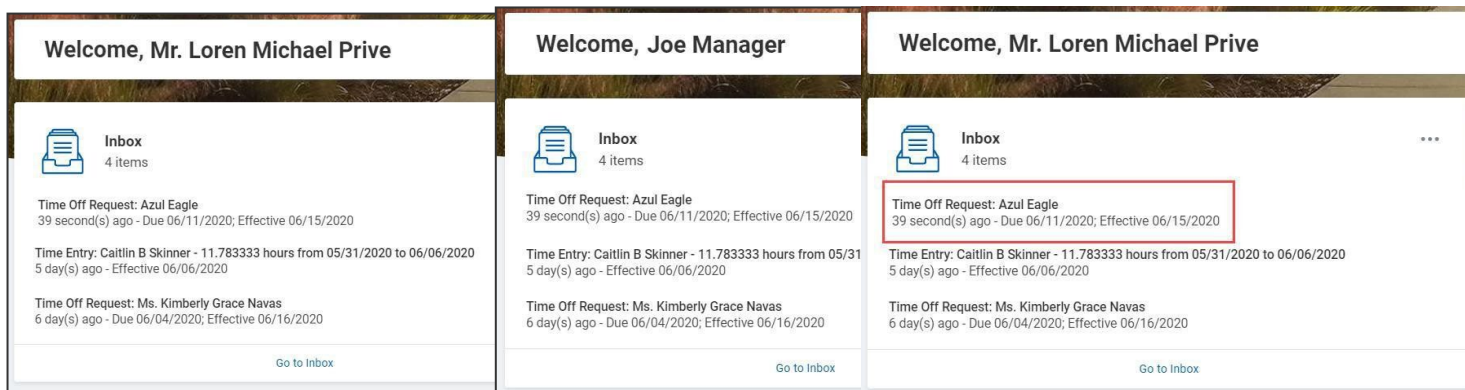
2. Select **Current Delegations** tab.



## ACTING AS A DELEGATE

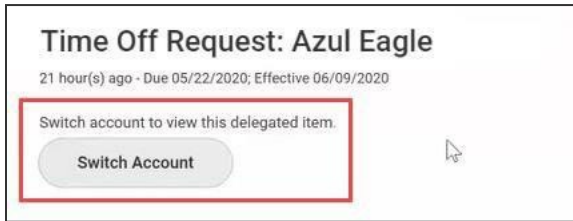
### INBOX TASKS

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**.

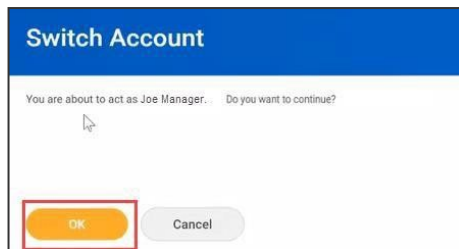


1. Select the **Inbox** item you wish to act upon (either from the **Inbox** card or your open **Inbox**),

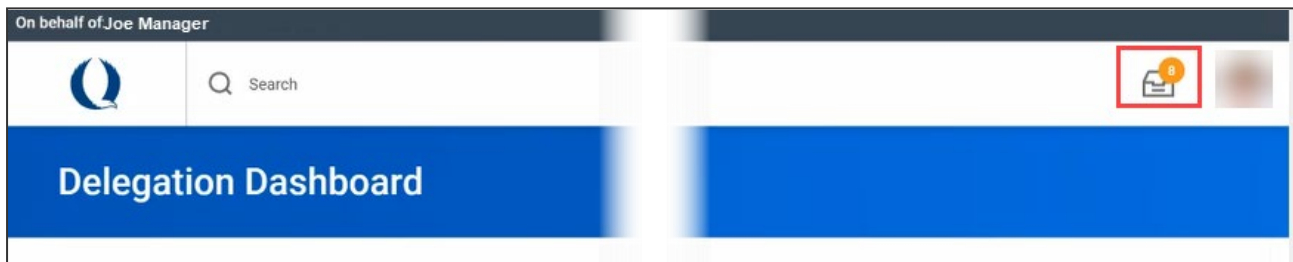
2. In the open item, click the **Switch Account** button



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

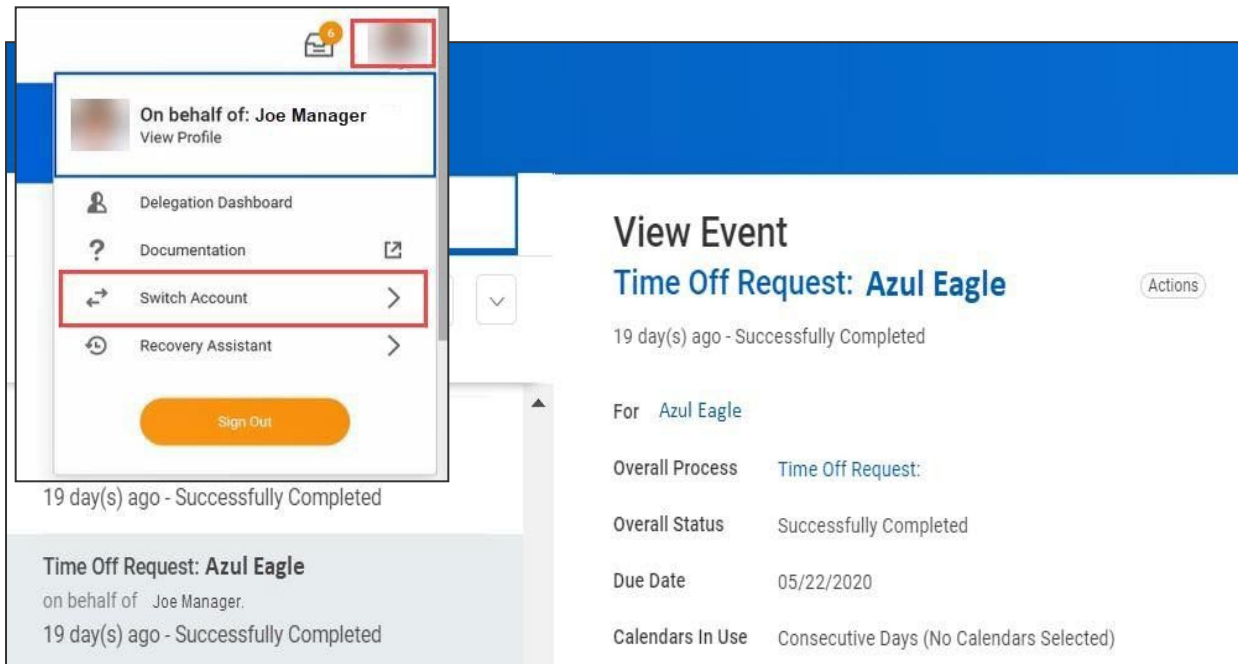


4. The **Delegation Dashboard** appears; from here you may access the **Delegator's Inbox** (acting on behalf of the **Delegator**)



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**



The screenshot shows a Workday interface. On the left, a dropdown menu is open, showing options: 'On behalf of: Joe Manager', 'Delegation Dashboard', 'Documentation', 'Switch Account' (highlighted with a red box), and 'Recovery Assistant'. Below the menu is a 'Sign Out' button. The main content area shows a 'View Event' page for 'Time Off Request: Azul Eagle', which is 'Successfully Completed' 19 days ago. The event details include: 'Overall Process: Time Off Request', 'Overall Status: Successfully Completed', 'Due Date: 05/22/2020', and 'Calendars In Use: Consecutive Days (No Calendars Selected)'.

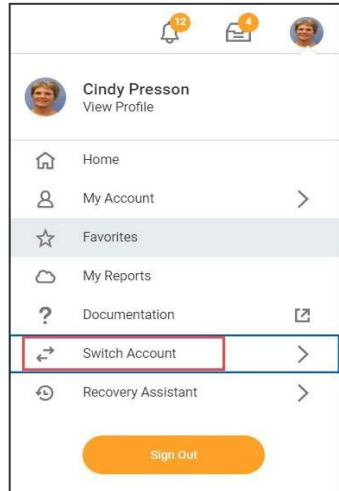
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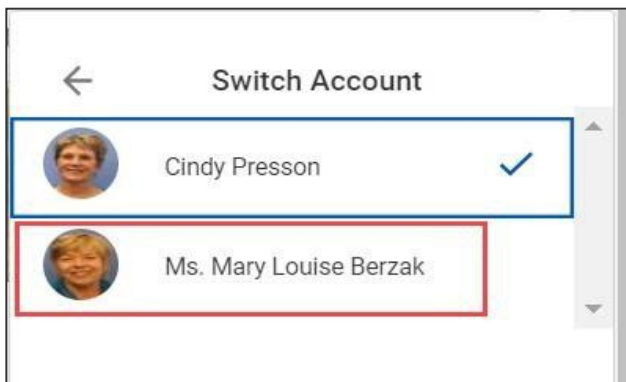
### INITIATING A BUSINESS PROCESS AS A DELEGATE (“START ON MY BEHALF”)

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**



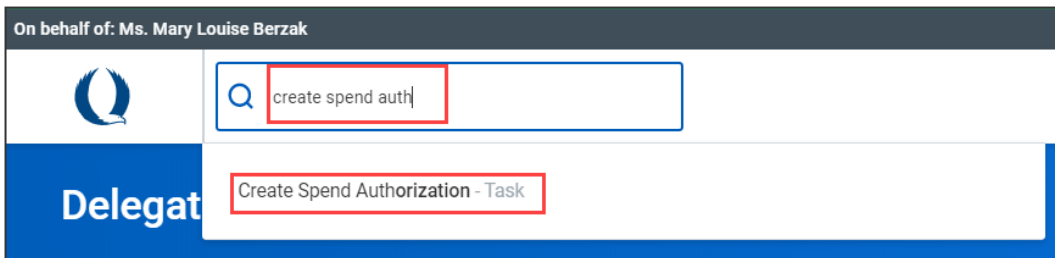
2. From the options displayed, select the person you wish to act **On Behalf Of**



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 **BusinessProcess**



**\*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.