Managers: Delegation

Delegation is a process in Workday that directs tasks from one individual’s Workday inbox to that of another person with the same assigned Security Role. The purpose of Delegation is to ensure that a business process is not delayed due to an Approver being out of the office.

Delegation does not remove responsibility (ownership) for the task from the user it was initially assigned to and, when the delegation period ends, any incomplete delegated tasks revert to the original owner.

The following standards should be applied when considering delegating authority:

- The delegation should be made on a temporary basis and have an end date of no longer than one year.
- The delegate and any alternate delegates should be in a position of equal or higher authority than the person delegating.

Steps

1. From the home page, select the **Inbox**, select the **More** button, then select **My Delegations**.

2. On the **My Delegations page**, click the **Manage Delegations** to open the Manage Delegation page.
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3. Enter a **Begin Date** – it cannot be prior to the current date.

4. Enter an **End Date** if needed.

5. In the **Delegate** field, enter the name of a person (or more than one person) to whom you will delegate.

6. In the **Start On My Behalf** field, choose the task you’d like the delegate to start (i.e. Create Job Requisition or Hire an Employee). Add a line for each task you want the delegate to start on your behalf.

7. In the **Do Inbox Tasks On My Behalf** field, choose one of the options to allow your delegate(s) the ability to see and act on from your Inbox.

   You can allow your delegate(s) to see all business processes that come to your inbox or a specific set of business processes.
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**Note:** It is recommended that you check the Retain Access to Delegated Tasks in Inbox box to retain the ability to complete your tasks.

8. Select the **Submit** button.

9. To review the details of the delegation, select the **Details and Process arrow**. You can also see the next approval steps under the **Process** tab. The request to delegate will route to your manager for approval prior to it going into effect.

**Note:** The delegation request will route to your manager for approval.

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**Up Next**

- **Daily Fast**
- Approval by Manager
- Due Date: 01/31/2020

**Details and Process**

- For: Kevin Hart
- Overall Process: Delegation for Kevin Hart on 01/30/2020
- Overall Status: In Progress
- Due Date: 01/31/2020

10. After your manager approves the delegation, the delegate will receive the following **notification**:
11. To review the delegation Inbox, select the View Entire Delegation Inbox button.

12. Select the Take Action button to view delegate tasks and take some action on the process.

**Cancel or Modify the Delegation**

Once you submit the delegation, you can cancel or modify it.

**If the delegation is approved:**

You can modify the dates, task, and other information, and you can add new delegates or remove delegates.

1. From your Workday Inbox, select the More button and My Delegations.
2. On the My Delegations page, select the Manage Delegations button.
3. Modify the delegation as you like. Select the Remove Row (minus) button to delete the delegation.
4. Select the Submit button.

**If the delegation is not approved:**

1. From your Inbox, select the More button and My Delegations.
2. Select the Delegation History tab. The unapproved delegation will be in progress.
3. To cancel a delegation request, select the Related Actions icon of the delegation that is “In Progress”.
4. Select the Business Process and select Cancel.
5. Enter a Comment.
6. Select the Submit button.
DELEGEE

Acting on Behalf of Another User:

You are assigned to be a delegate by a co-worker to perform approval tasks on their behalf. Follow the instructions below to act on their behalf:

From the home landing page, select the Employee Profile.

1. On your profile menu, select **Switch Account** to switch to the delegated account.

2. Select the user for whom you are a delegate.

**Note:** Switching accounts brings up the delegation dashboard with delegated actions. From here, you can initiate business processes that have been delegated to you by your co-worker.
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3. From the Delegation Dashboard, the Delegee can **initiate** tasks by clicking on actions under **Reports and Tasks**

4. To switch to your personal Workday account, select the **Switch Account** and select your own name.

**To View Delegated Inbox:**

To view the **Inbox** that is delegated to you by your co-worker, follow the steps below:

1. **Before** switching accounts, you can also view the **Delegation Inbox** by accessing your Notifications. Navigate to the notification for **Workday Delegated Tasks**; then, select the **View Entire Delegation Inbox**.

2. **After** switching to the delegated Inbox, select the **Inbox** icon and you can see your co-worker’s delegated **Inbox**.