

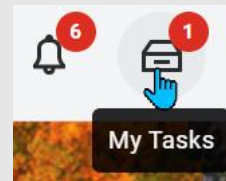
Introduction: Actions and tasks are routed to you through a business process and appear in your My Tasks inbox for review and approval. Sometimes these tasks are better completed by someone else, or you may be out of office for a period of time, and that’s where delegations come in. **If you are a supervisor of hourly workers, delegations are particularly important to put into place to ensure timesheets can be approved in your absence.**

Delegation temporarily reassigns your tasks to another user, enabling that user to perform individual actions on your behalf. The delegate you select is restricted to the tasks you delegate to them. The delegate can only take actions within the limits of your own access privileges.

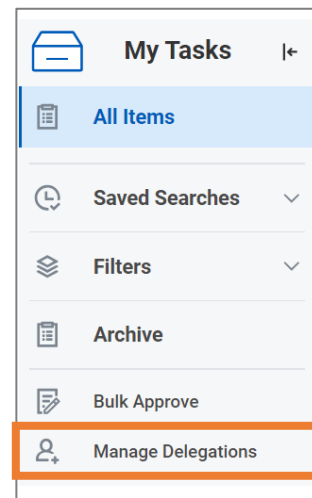
You can allow your delegate to initiate an action on your behalf. Or you can allow your delegate to approve inbox items on your behalf. Or both.

Create a Delegation

1. To start, click on your Tasks inbox in the upper right hand of the Workday home page.



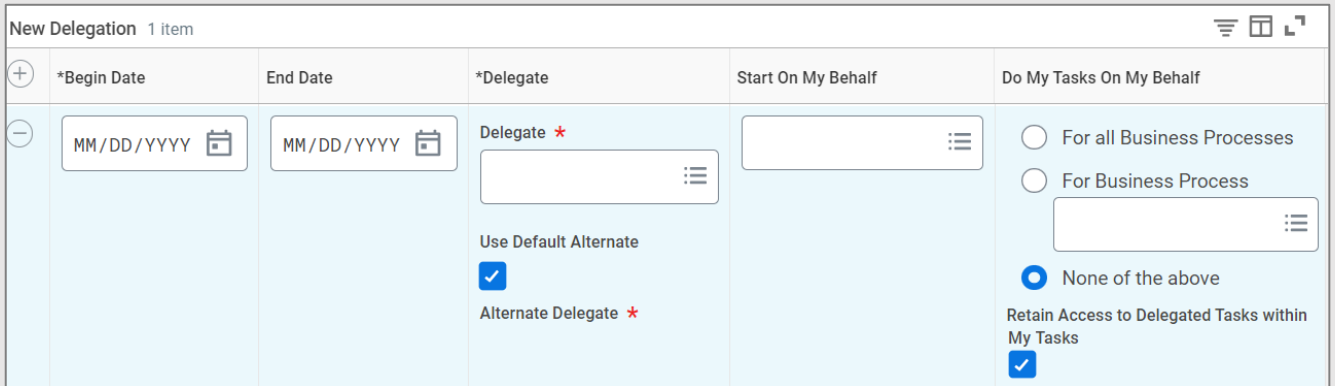
2. In the left-hand navigation on the resulting page, click **Manage Delegations**.



3. Below is a guide to each tab on the resulting screen.

Current Delegations	Current Task Delegations	Delegation History	Delegated Tasks	Business Processes allowed for Delegation
↑	↑	↑	↑	↑
Any active delegations and delegates will be listed here	A list of all delegated tasks that have not yet been completed	This is a log of delegations, both active and inactive, for your profile	Displays all tasks that a delegate has completed on your behalf	An exhaustive list of all business processes that may be delegated

3. To create a delegation, click the Manage Delegations button at the bottom of the Current Delegations tab.

4. 

Fill out the resulting delegation form, including:

- The **date range** in which it should take place (it can also be left open-ended for ongoing delegations).
- **Delegate** - Type in the name of the person you are delegating to and press “enter” to select them from the drop-down menu. Note: The Default Alternate delegate is the manager of the delegate you have selected, which you may override by unchecking the Use Default Alternate box and putting a different name in the Alternate Delegate field.
- **Start on My Behalf** - If you would like the delegate to be able to initiate business processes on your behalf, like creating a job requisition (for a recruitment), you will select them from the drop-down menu that displays after clicking in the field. This may not always apply and this field can be skipped.
- **Do My Tasks On My Behalf** – The most commonly used area for delegations, this allows you to delegate tasks and action items assigned to you so that someone else may complete them on your behalf. Examples would include approving time clock entry and approving absences. You may choose to delegate all business processes or select specific business processes from a list that displays when clicking in the For Business Process field.
- **Retain Access to Delegated Tasks** – Checking this box will allow both the delegate and you will have the ability to view and complete any action items or tasks assigned to you. If you do not check this box, you will not have access to your My Task items during the specified date range.

5. Once the form is completed, click the **Submit** button and the delegation request will be routed to your direct supervisor for approval. You will receive a notification once the delegation has been approved.

End a Delegation

1. You may end the delegation at any time, even before the date range specified. Go to your My Tasks inbox and select the last menu choice, **Manage Delegations**.

Click the minus button to the left of the delegation and then **Submit**. The delegation will be removed.

> **Business Processes allowed for Delegation**

New Delegation 1 item

	*Begin Date	End Date	*Delegate
+			
-	02/06/2024	02/06/2024	Delegate * × Andrea Jones ...

Managing Delegated Tasks

1. When you have been delegated tasks by someone else, the new tasks and action items will be listed in My Tasks along with your own. The tasks delegated to you will be labeled with “On behalf of” as shown in the example to the right.

Absence Request: **Alex Jones** 02/02/2024 ☆

On behalf of Jane Wu

Due: 02/04/2024 | Effective: 02/16/2024

2. Upon clicking on a delegated task, a prompt to switch accounts will appear in the task description pane. Click **Switch Account** and then **OK**.

Absence Request: Alex Jones

☆ 📅 PDF ⚙️ ↗️

Created: 02/02/2024 | Due: 02/04/2024 | Effective: 02/16/2024

Switch account to view this delegated item.

Switch Account

➔

Switch Account

You are about to act as **Jane Wu**. Do you want to continue?

OK

Cancel

3. Click on the **My Tasks** icon in the upper right corner and complete delegated tasks. The My Tasks folder will function in the same way as your own. It will be noted within the system that any approvals made were done by you on behalf of the original assignee.

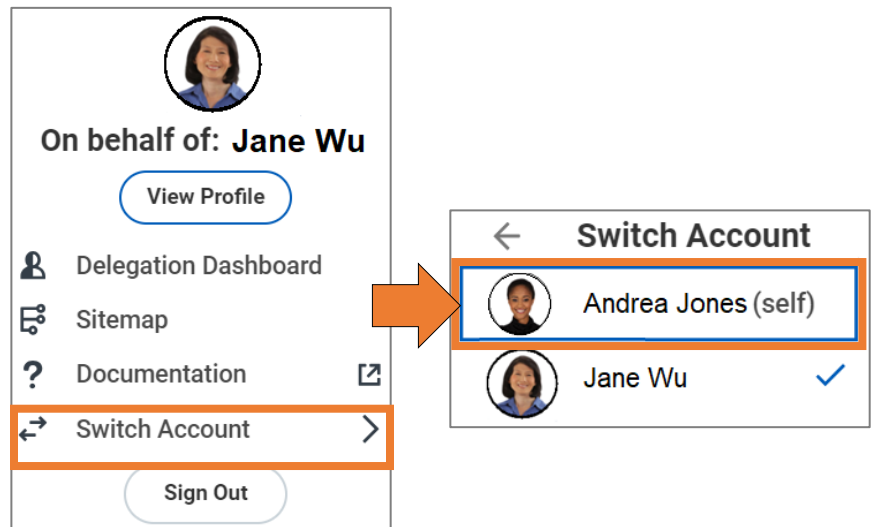
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Delegation Dashboard

Delegated Actions

No data found

4. To navigate back to your account, click on your profile picture in the upper right-hand corner. Click on **Switch Account** from the resulting menu and then click on your name.



Establishing a Back-Up for Time Approvals

If you are a supervisor, it's a good idea to have another supervisor serve as a back-up for timesheet approvals should you find yourself unexpectedly out of the office or on a pre-planned vacation. You may establish a fixed-term delegation (say, for a 2-week vacation) or an open-ended delegation so that your colleague may provide timesheet back-up at any time.

To provide all of the access needed, you'll want to establish your delegation as pictured below.

