Delegation

Managers can use delegation to allow additional users to act upon their behalf for the approval of time worked and time off.

Create a delegation to Approve Inbox tasks on your behalf:

1) Select the Related Actions icon next to your name
2) In the Available Actions menu on the Worker Preview pane, select Business Process > My Delegations.
3) On the My Delegations page, click the Manage Delegations button to access the Manage Delegation page.
4) Enter a Begin Date – it cannot be prior to the date you are entering the delegation.
5) Enter an End Date if needed.
6) In the Delegate field enter the name of a person (or more than one person) to whom you will delegate.

7) In the Do Inbox tasks on My Behalf field choose one of the options if you want to allow your delegate(s) the ability to see and act on any tasks that appear in your Inbox.

   You can allow your delegate(s) to see all business processes that come to your inbox or a specific set of BPs.

8) We recommend, checking the Retain Access to Delegated Tasks in Inbox box to retain the ability to complete your tasks.
9) Click Submit.

   Note: The delegation request will route to the manager's manager for approval.
Cancel or modify the delegation:

Once you submit the delegation you can cancel or modify it. The way you proceed depends on whether your manager has already approved your delegation or not.

If the delegation is Approved:

For approved delegations, you can modify the dates, tasks, and other information, and you can add new delegates or remove delegates.

1) Select the Related Actions icon next to your name
2) In the Available Actions menu highlight Business Process>My Delegations.
3) On the My Delegations page, click the Manage Delegations button.
4) Modify the delegation as you like.
5) Click Submit.

If the delegation is Not Approved:

1) To modify the delegation request, click the Related Actions icon near your name.
2) Highlight Business Process, and click My Delegations.
3) Click the Delegation History tab, and you will see the delegation that you started, it will still be in progress.
4) To cancel a delegation request: Click the Related Actions icon off the Delegation Action that is “In Progress”.
5) Highlight the Business Process option and click Cancel.
6) Enter a Comment.
7) Click Submit.

Note: You can also access this via the Archive tab of your Inbox by clicking on the Delegation event, select the Related Actions icon to the right of the delegation request, highlight the Business Process option, and click Cancel.

Delegation: Acting on Behalf of Another User:

Workday makes it easy for you to manage and perform delegated tasks. The action of Switch Account is taken to act on behalf of another user. If you currently have delegations assigned to you, Workday displays the Switch Account icon next to your name.
1) To switch to the account for which delegations have been assigned to you, click Switch Account.

2) Click on the account of the user for who you have been delegated to act on behalf of.

   Note: Switching Accounts brings up a new **Delegation Dashboard** and another worklet called **Delegated Actions**. From this dashboard, you can initiate business processes that have been delegated to you by the user on whose behalf you are acting.

3) User can initiate new tasks by clicking on the hyperlink within **Reports and Tasks**.

4) To switch back to your personal Workday account, click the **Switch Account** icon again and click your own name.

**Delegation: To View Entire Delegation Inbox:**

In order to **View Entire Delegation Inbox**, users can do the following steps:

1) From your Profile Menu, click on **Notifications**.

2) Click on the notification called **“Workday Delegated Tasks Update.”**

3) Click on **View Entire Delegation Inbox** and proceed to any of the following tabs:

   - **Tasks** – displays the business process awaiting your action as well as who delegated, the Subject, Due Date and Date Received, Skip or Reassign (if possible).
   - **Process Status** – displays the business process status of the events in which you have acted upon.
   - **Notifications** – displays notifications as well as allows you to view and maintain notifications.
   - **Delegation Settings** – displays the current delegations and corresponding information.