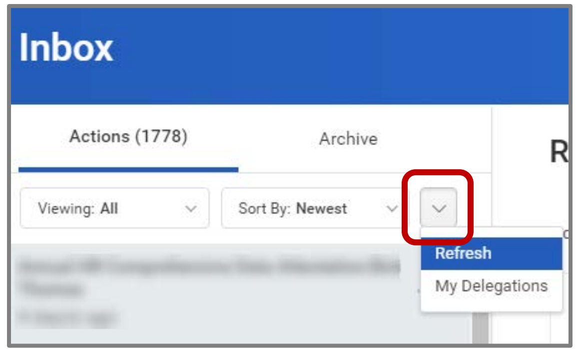
Cornell University

Delegating Approvals
Managers and Delegates
Last updated: 8/14/18

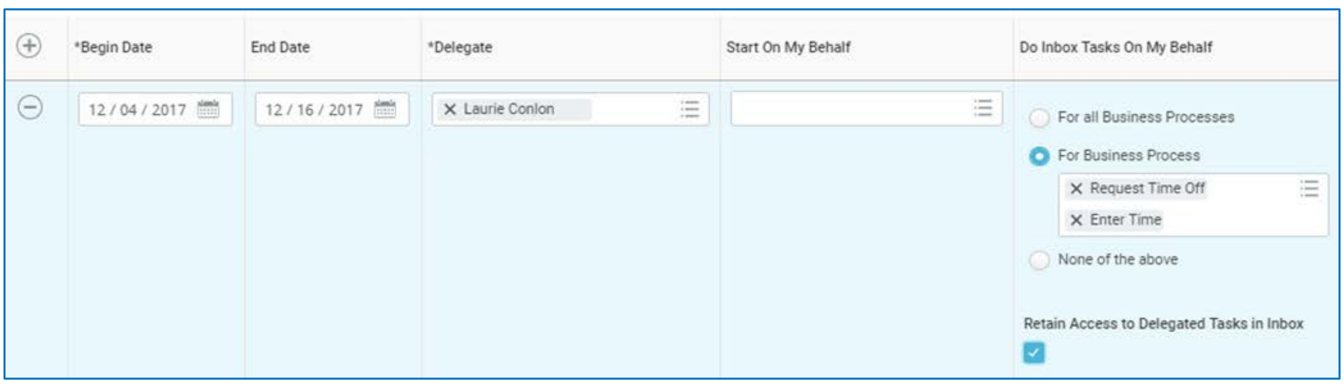
Delegation

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

Create a delegation to allow a co-worker to act on your behalf:



1) In your Workday Inbox, click the **More** button and select **My Delegations**.
2) On the **My Delegations** page, click the **Manage Delegations** to open the Manage Delegation page.
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 **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 business process.

   Important: Individuals assigned as a delegate on behalf of a manager for Time Tracking can only approve tasks of ***Enter Time***, ***Enter Time Off*** and ***Correct Time Off***.

7) We recommend that you check the **Retain Access to Delegated Tasks in Inbox** box to retain the ability to complete your tasks.
8) Click **Submit**.

   Note: The delegation request will route to your 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.

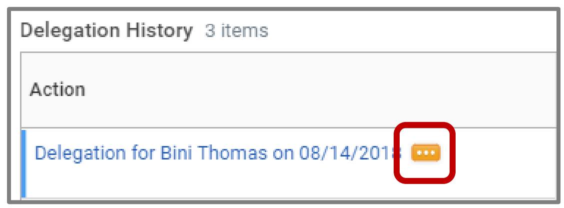
If the delegation is approved:

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

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

If the delegation is not approved:

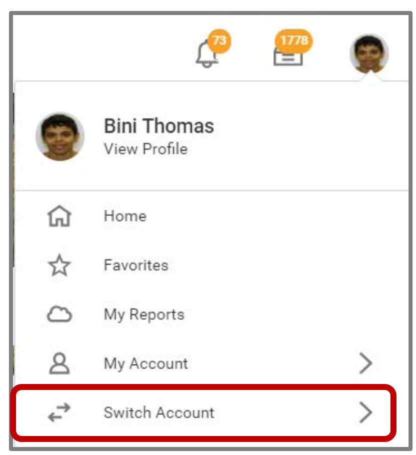
1) In your Inbox, click the **More** button and select **My Delegations**.
2) Click the **Delegation History** tab. The unapproved delegation will be in progress.
3) To cancel a delegation request, click the **Related Actions** icon off the delegation that is "In Progress".
4) Select **Business Process**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



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:

1) On your profile menu, click **Switch Account** to switch to the delegated account.
2) Click 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.

3) User can initiate tasks by clicking on actions under **Reports & Tasks**.

4) To switch to your personal Workday account, click the **Switch Account** and click 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) After switching to the delegated Inbox, click the Inbox icon and you can see your co-worker's delegated Inbox.