

Delegations in Workday allow you to give another person in your supervisory organisation the ability to initiate business processes on your behalf or complete chosen actions for your inbox tasks.

Note: For the duration of the delegation, your delegate will receive any tasks that would be directed to you for the specified processes as well as any related process notifications. Once a task delegation is in place, the delegate cannot then delegate the tasks to another person.

1 Search *Delegation*



2 Select *My Delegations*

Tasks and Reports

My Delegations

View Current Delegations with a button to request delegation changes, Current Task Delegations, Delegation History, Delegated Tasks, and Business Processes allowed for Delegation. Enables you to monitor and manage your d...

3 Click *Manage Delegations*

Manage Delegations

The *Manage Delegations* screen will appear.

Manage Delegations Actions

> Business Processes allowed for Delegation

New Delegation 1 item

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> For all Business Processes <input type="radio"/> For Business Process <input type="text"/> <input checked="" type="radio"/> None of the above

Retain Access to Delegated Tasks in Inbox

Delegation Rule

enter your comment

Attachments

Drop files here

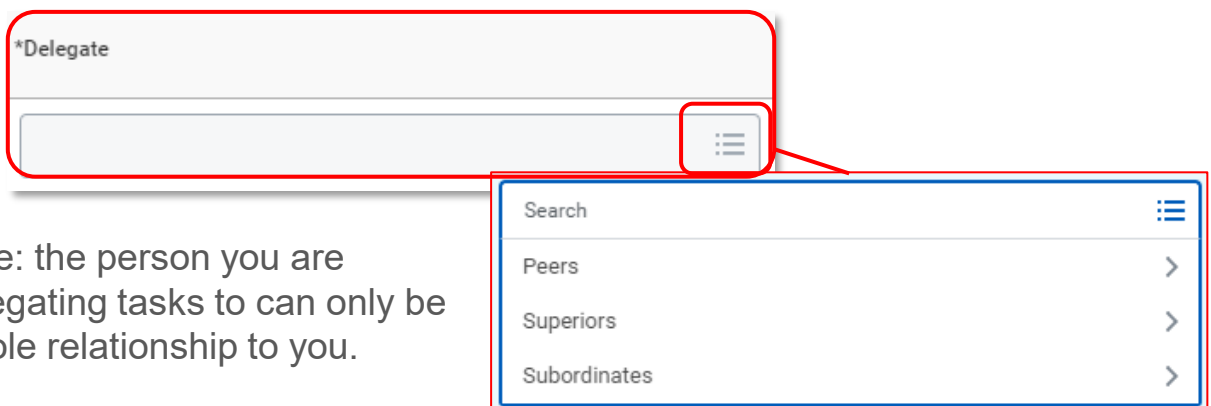
Submit Save for Later Cancel

- 4 Complete the *Begin Date*, *End Date* of the time frame the delegation is to occur.



The screenshot shows a 'New Delegation' form with a table containing two columns: '*Begin Date' and 'End Date'. Both columns have empty input boxes below them, which are highlighted with red rounded rectangles. To the left of the table are '+' and '-' icons.

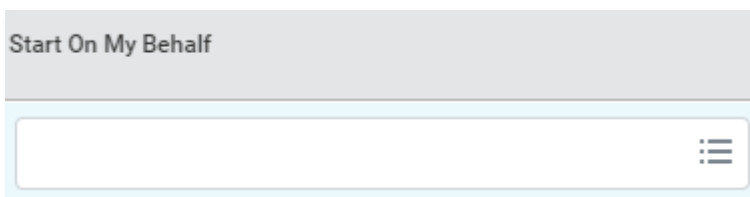
- 5 Select *Delegate* i.e. the person you are going to delegate tasks to. Either type the person's name or select from the options.



The screenshot shows a dropdown menu for the '*Delegate' field. The menu is open, showing a search bar and four options: 'Search', 'Peers', 'Superiors', and 'Subordinates'. Each option has a right-pointing arrow. A red box highlights the dropdown menu, and a blue box highlights the search bar and options list.

Note: the person you are delegating tasks to can only be in role relationship to you.

- 6 Select *Start On My Behalf* information. This gives your delegate the ability to initiate one or more business process/s or complete actions on your inbox tasks. **Note:** *Change Emergency Contacts*, *Change My Personal Information* and *Personal Information* if selected allows your delegate to initiate a change to your emergency contact and personal information – see ★.



The screenshot shows a dropdown menu for the 'Start On My Behalf' field. The menu is open, showing a search bar and a right-pointing arrow icon.

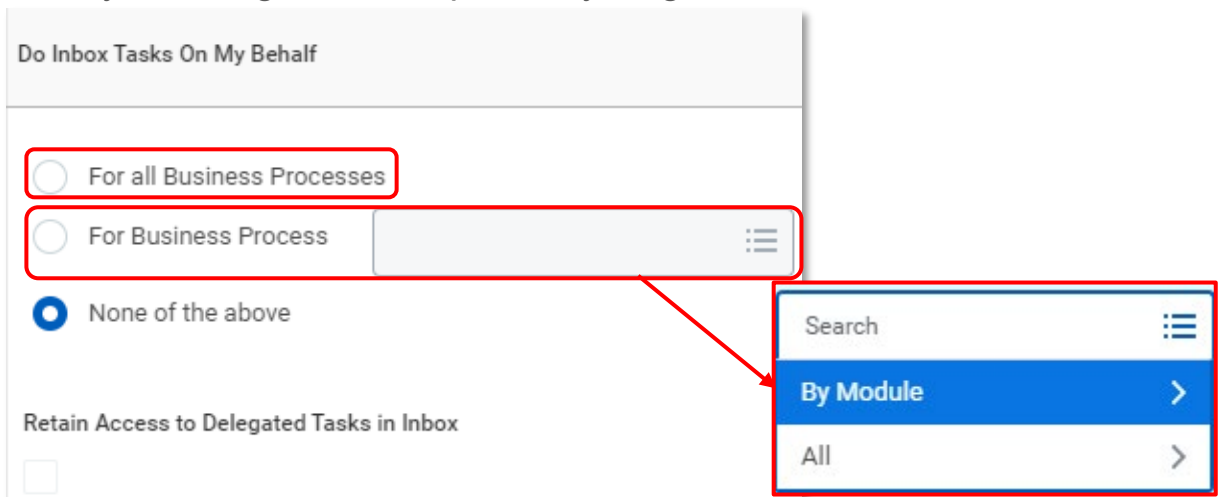
6 Cont...

The screenshot shows the 'Start On My Behalf' interface. At the top, there is a search bar. Below it, a dropdown menu is open, showing 'By Business Process Type' and 'All'. Red arrows indicate the flow from the search bar to the dropdown, and from the dropdown to the search results. The search results are split into two columns. The left column is filtered by 'By Business Process Type' and shows a list of processes, with 'Change Emergency Contacts' and 'Personal Information Change' highlighted with black boxes and stars. The right column is filtered by 'All' and shows a list of processes, with 'Change My Personal Information' highlighted with a blue box and a star.

Example below shows multiple business processes.

The screenshot shows the 'Start On My Behalf' interface with a list of business processes. The list includes: 'Add Employee Status to Academic Affiliate', 'Contract', 'Change Organization Assignments', and 'Start Job Change'. Each item has a grey 'x' icon to its left and a menu icon to its right.

- 7 Select *Do Inbox Tasks On My Behalf*. This sets the actions your delegate may complete for your inbox tasks. You may choose *For all Business Processes* which grants delegation to all inbox tasks, or, *For Business Process* where you select what inbox tasks your delegate has access to. Note: *None of the above* **does not** allow your delegate to complete anything.



Do Inbox Tasks On My Behalf

For all Business Processes

For Business Process

None of the above

Retain Access to Delegated Tasks in Inbox

Search

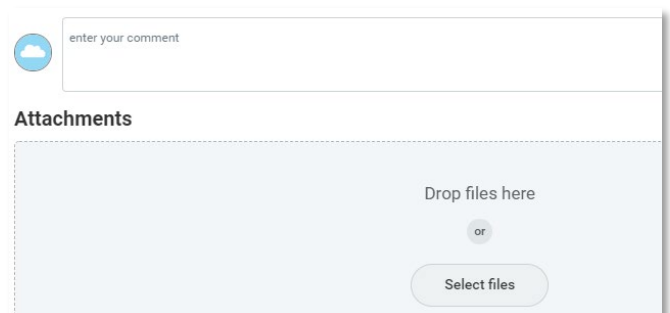
By Module

All

Tick 'Retain Access to Delegated Tasks in Inbox' if you want to retain access to your inbox tasks whilst delegating it to a Delegate, tick 'Retain Access to Delegated Tasks in Inbox' box. By doing so both you and the delegate can act on tasks coming to your inbox.

Note: You may add more than one delegate at a time if you are assigning different tasks to each. Otherwise, you can share the delegate load for different timeframes. E.g. assign 1st week of the month to one delegate and the 2nd week of the month to another etc.

- 8 Once the manage delegation screen has been completed, enter any relevant comments and attachments you wish. Note: this is not mandatory



enter your comment

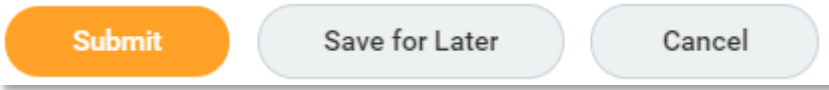
Attachments

Drop files here

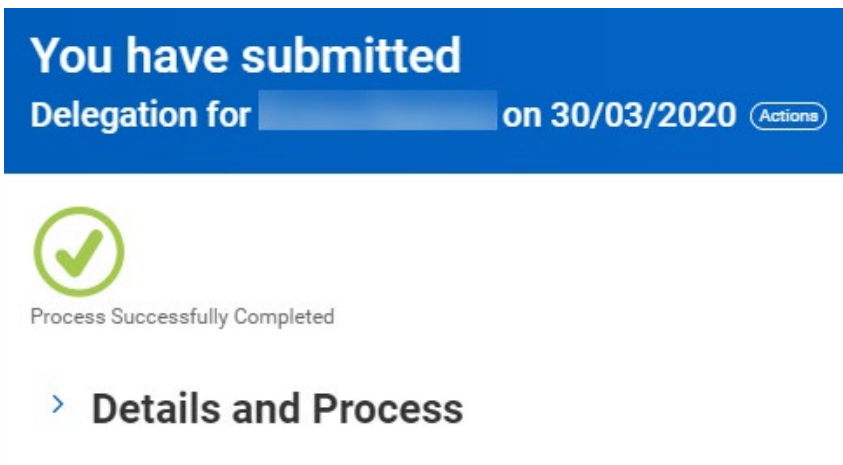
or

Select files

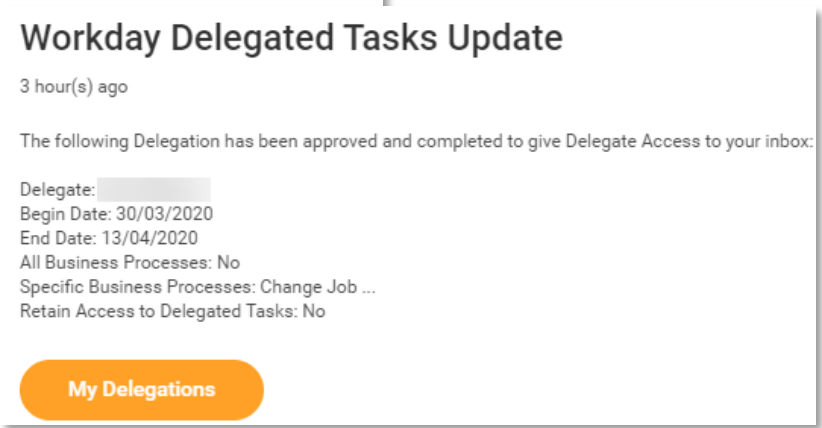
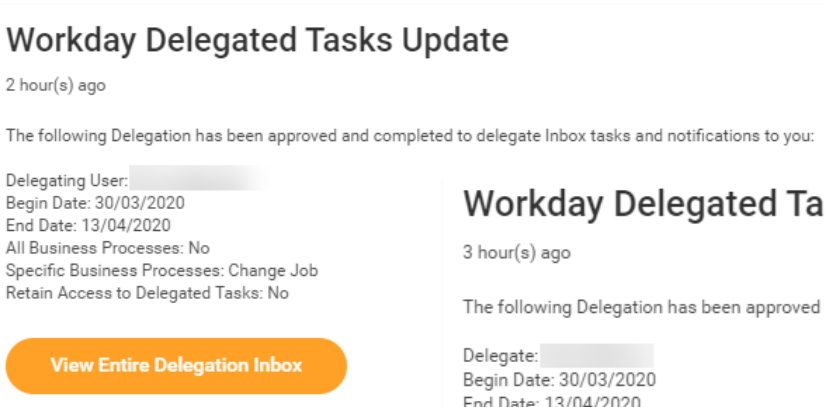
9 Click *Submit*.



Once submitted, the *You have submitted* screen will appear stating *Process Successfully Completed*. Your delegates will have access to the assigned processes/tasks as per data completed.



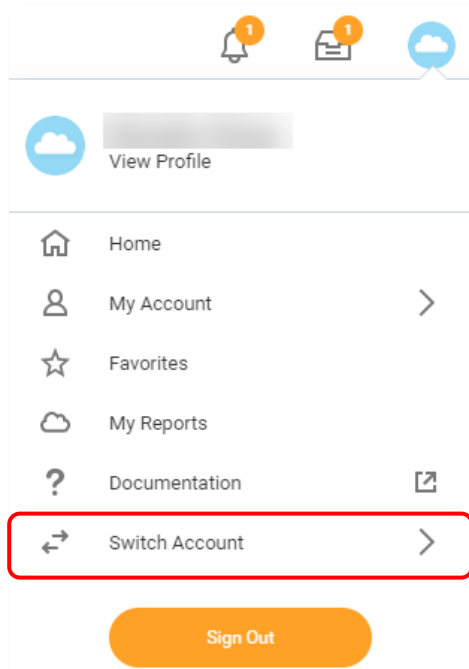
Both you and your delegate will receive a notification in Workday advising the delegation.



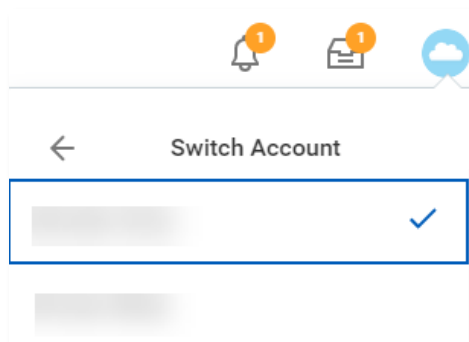
Completing delegated tasks

Once you have been assigned as a delegate, you will have the option to *Switch Account* in order to complete required tasks on behalf of the delegator.

- 1 Click on your Profile, select *Switch Account*.



- 2 Select the account you wish to use (your name will be on the top and the delegator underneath).

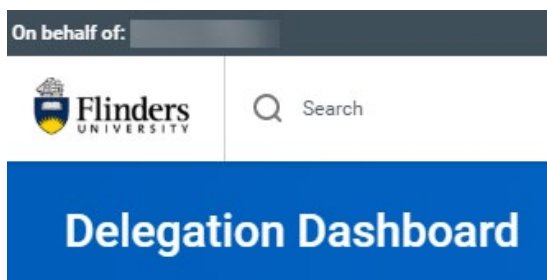


Completing delegated tasks

Once you have selected the primary employee, you will navigate to the *Delegation Dashboard*



Note the top of the screen will now show *On Behalf Of:*



Also note the top right-hand side only has an inbox and profile



- 3 Click the *Inbox* and complete the actions as required. Ensure the adherence to business process guidelines is followed.

Note: Delegated Inbox tasks are displayed in your Inbox (for your Workday account) as well. The action item titles display **On Behalf of**, followed by the name of the delegator to indicate that they are delegated tasks. However, you cannot view the details or complete the tasks until you switch accounts. In addition, you cannot view the details of or complete delegated

To switch back to your Workday account, select *Switch Account* again, and select your own name.

View current delegations

1 Search *Delegation*



2 Select *My Delegations*

Tasks and Reports

My Delegations

View Current Delegations with a button to request delegation changes, Current Task Delegations, Delegation History, Delegated Tasks, and Business Processes allowed for Delegation. Enables you to monitor and manage your d...

3 Under the *Current Delegations* tab, you will see your current delegations listed.

My Delegations

For [User]

Current Delegations | Current Task Delegations | Delegation History | Delegated Tasks | Business Processes allowed for Delegation

1 item

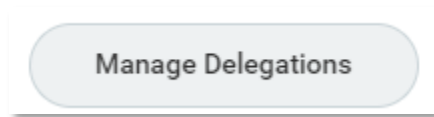
Begin Date	End Date	Delegate	Start On My Behalf	Business Processes	Retain Access to Delegated Tasks in Inbox
30/03/2020	13/04/2020	[User]	Add Employee Status to Academic Affiliate Change Organization Assignments Contract Start Job Change	Change Job	No

Manage Delegations





Edit / Remove current delegations

To edit or remove a current delegation, complete the steps 1-3 to view current delegations.

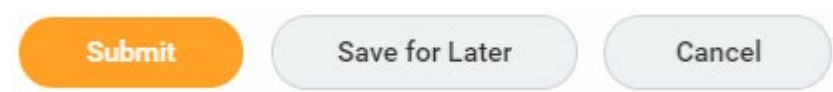
4 Click *Manage Delegations*



5 To edit - Amend the date requiring edit and click *Submit*. To remove – click on the delegation you wish to remove.


New Delegation 1 item		
	*Begin Date	End Date
	30 / 03 / 2020 	13 / 04 / 2020 

7 Click *Submit*.



If you have edited the delegation, you will receive the *You have submitted delegation for* screen.


You have submitted
Delegation for [redacted] on 25/03/2020 [Actions](#)


Process Successfully Completed

> **Details and Process**

If you have removed the delegation, you will receive the *You have submitted delegation stopped* screen.

You have submitted
Delegation stopped for [redacted] [Actions](#)


Process Successfully Completed

> **Details and Process**