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*

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Q   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
⊖					○ For all Business Processes
					○ For Business Process
					● None of the above
					Retain Access to Delegated Tasks in Inbox
					☐
					Delegation Rule

enter your comment

Attachments

Drop files here
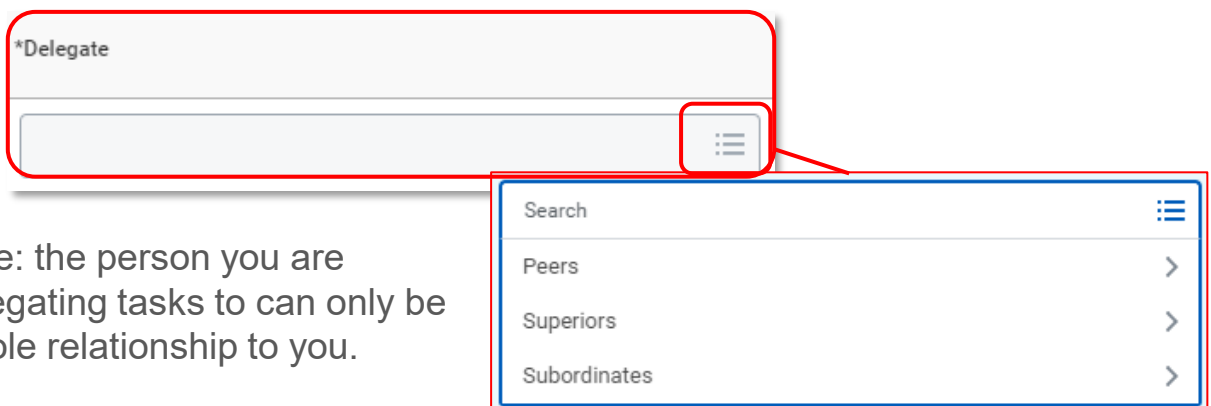
Submit   Save for Later   Cancel

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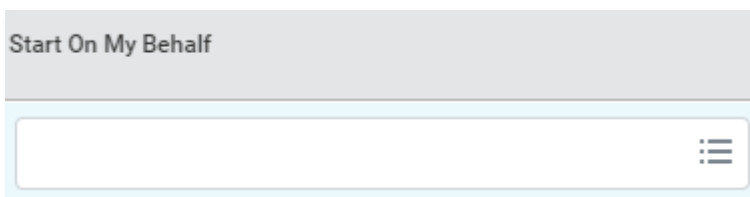

5   Select *Delegate* i.e. the person you are going to delegate tasks to. Either type the person's name or select from the options.

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 ★.

6   Cont…

Example below shows multiple business processes.

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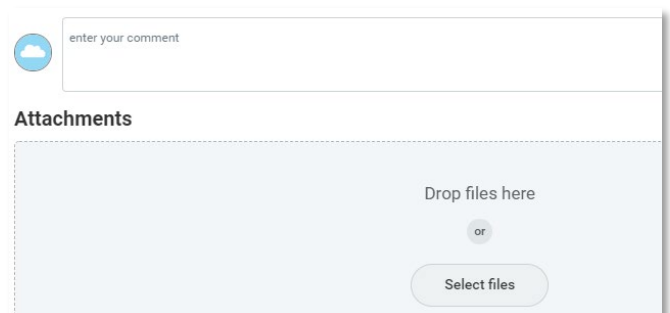
Tick '*Retain Access to Delegated Tasks in Inbox* If you want to retain access to your inbox tasks whilst delegating it to a Delegate, tick 'Retain Access to Delegated Tasks in Inbox' box. By doing so both you and the delegate can act on tasks coming to your inbox**.**

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

9   Click *Submit.*
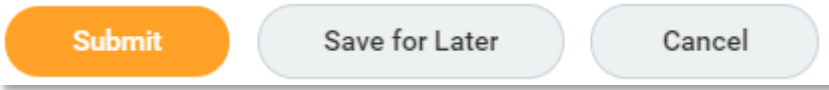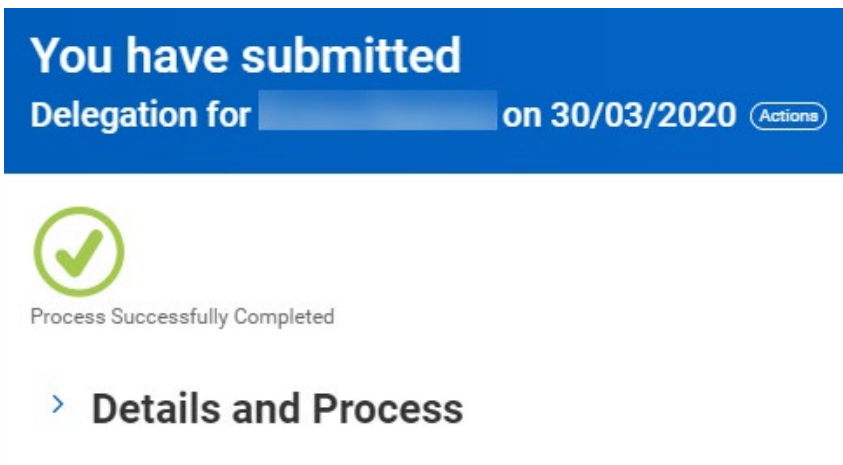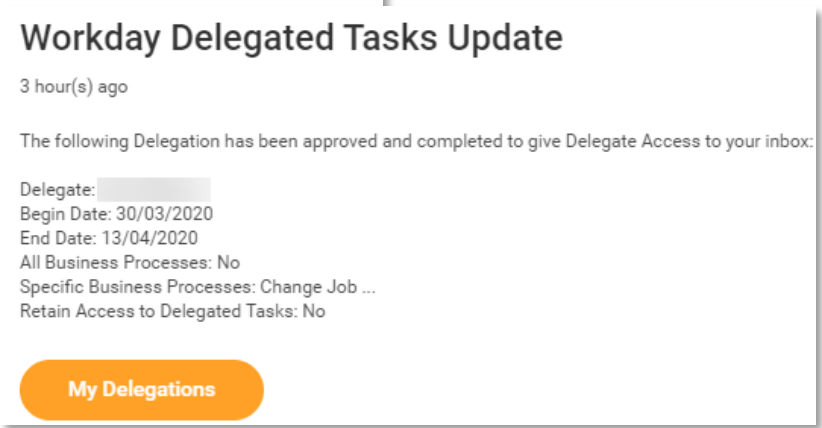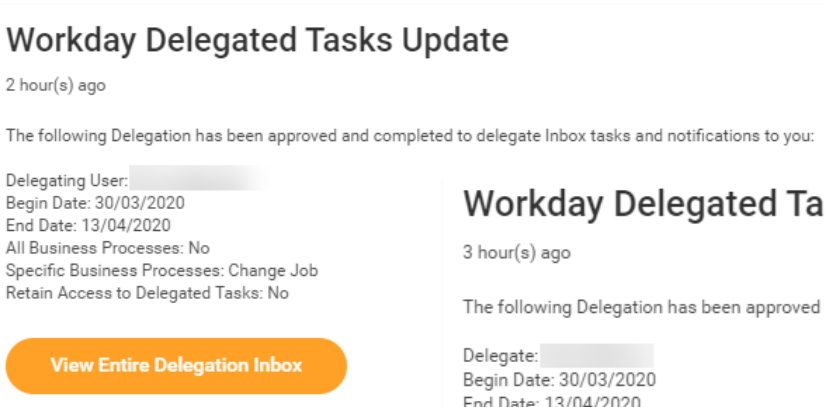

Once submitted, the *You have submitted* screen will appear stating *Process Successfully Completed.* Your delegates will have access to the assigned processes/tasks as per data completed.
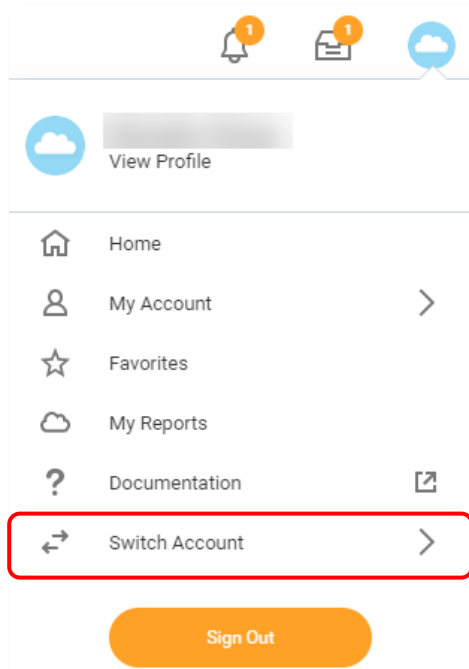

Both you and your delegate will receive a notification in Workday advising the delegation.
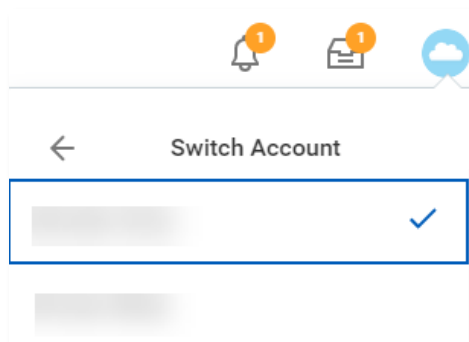
Completing delegated tasks

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).
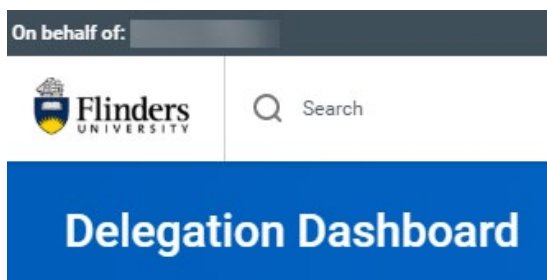
workday.

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.

workday.

View current delegations

1   Search *Delegation*

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Q   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

| 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		Add Employee Status to Academic Affiliate Change Organization Assignments Contract Start Job Change	Change Job	No

Manage Delegations

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Edit / Remove current delegations

To edit or remove a current delegation, complete the steps 1-3 to view current delegations.
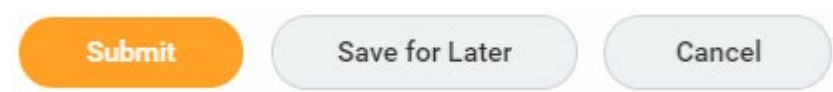
4   Click *Manage Delegations*

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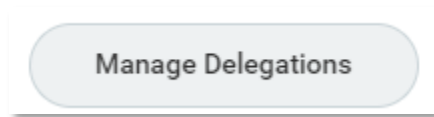
5   To edit - Amend the date requiring edit and click *Submit.*
     To remove – click ⊖ on the delegation you wish to remove.

New Delegation 1 item

⊕	*Begin Date	End Date
⊖	30 / 03 / 2020 📅	13 / 04 / 2020 📅

7   Click *Submit.*

> Submit   Save for Later   Cancel

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

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