



Delegations

Audience: Manager

Overview:

This Job Aid covers the delegation process. This is a useful action when you are not able to complete a workday inbox task due to time off or a leave of absence.

It's important to note that you may only select a peer or your manager to act as your delegate for Inbox Tasks.

This Job Aid covers:

- [Set Up Delegations](#)
- [Act as Delegate](#)

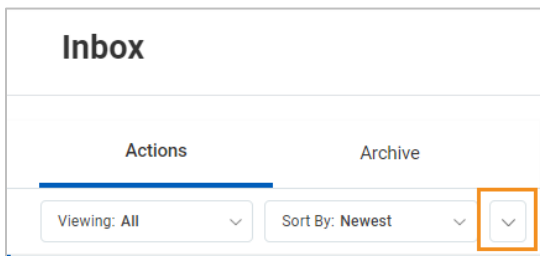
Set Up Delegations

To set up your delegation so that someone else may act on your behalf.

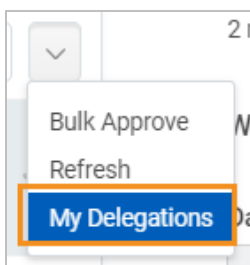
1. From the Workday homepage, click the **Inbox** icon.



2. Click the **dropdown arrow**.



3. Select **My Delegations**.



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4. Click the **Manage Delegations** button.

The screenshot shows the "My Delegations" interface for a user named "Molli Manager". It includes tabs for "Current Delegations", "Current Task Delegations", "Delegation History", "Delegated Tasks", and "Business Processes allowed for Delegation". The "Current Delegations" tab is active, showing a table with columns "Begin Date", "End Date", "Delegate", and "Retain Access to Delegated Tasks in Inbox". The table is currently empty, displaying "No items available." A "Manage Delegations" button is highlighted with an orange box at the bottom left.

5. To add a new delegation, click the **plus sign** in the upper left corner.
- a. Enter the **Begin and End Date** that you want the delegate to be able to act on your behalf. If no end date is input the delegate will continue to be able to act on your behalf.
 - b. In the **Delegate** field, enter the name of the person you are delegating to.

The screenshot shows the "Manage Delegations" page for "Molli Manager". It features a section titled "Business Processes allowed for Delegation" and a "New Delegation" section with "1 item". A table is shown with columns for "*Begin Date", "End Date", and "*Delegate". A plus sign icon in a square box is highlighted in orange in the top left corner of the table, indicating where to click to add a new delegation.



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6. In the *Start On My Behalf* field, **select** the processes you want to allow the delegate to initiate for you.

The left screenshot shows the 'Start On My Behalf' configuration screen. It features a search bar and a dropdown menu for 'By Business Process Type' with 'All' selected. The right screenshot shows the expanded dropdown menu with the following options:

- Assign Work Schedule
- Change Background Check Status
- Change Emergency Contacts
- Change Job
- Change My Personal Information
- Change Organization Assignments
- Close Evergreen Requisition
- Correct Absence

7. In the *Do Inbox Tasks on My Behalf* section, select **For All Business Processes** or **select** the specific Inbox tasks you want the delegate to do on your behalf.

The left screenshot shows the 'Do Inbox Tasks On My Behalf' configuration screen. It features three radio buttons: 'For all Business Processes' (selected), 'For Business Process', and 'None of the above'. Below the radio buttons is a checkbox for 'Retain Access to Delegated Tasks in Inbox' which is checked. The right screenshot shows the expanded dropdown menu for 'For Business Process' with the following options:

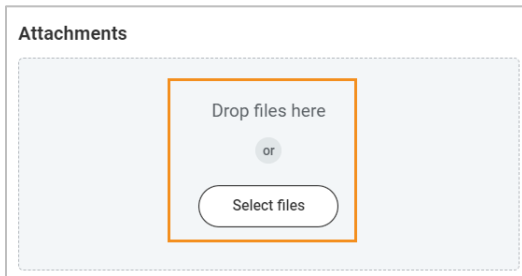
- 1099 Adjustment
- 1099 Electronic Filing Run Event
- Absence Calendar
- Absence Case Event
- Account Certification Event
- Accounting Adjustment Event
- Accounting Center Batch Initiation Event
- Accounting Center Detailed Accounting Event



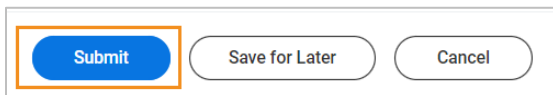
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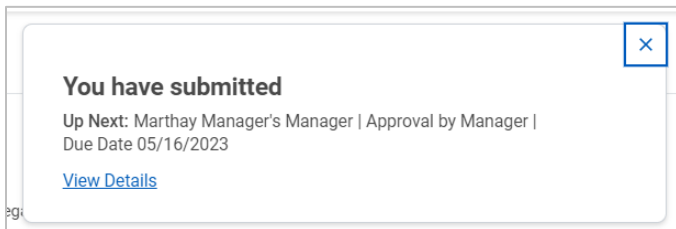
8. In the *Attachments* section, **select** and download any attachments relevant to the delegation, if applicable.



9. Click Submit.



10. The delegation will be routed to your manager for approval.



Act as Delegate

Once you have been made a delegate you will be able to access tasks delegated to you by switching your account. There are two ways to access a delegated account, from your Inbox and from your Profile.

1. From the Workday homepage, click the **Inbox** icon.

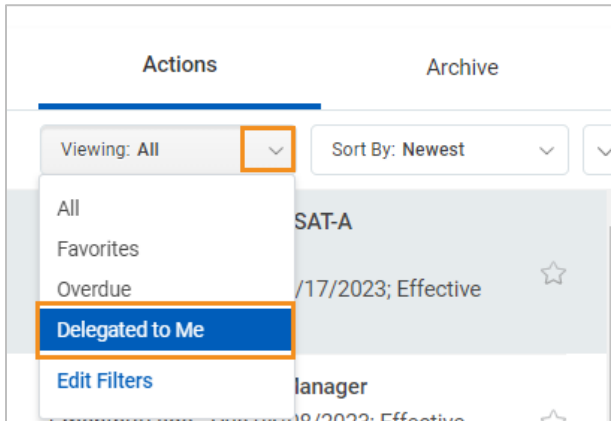




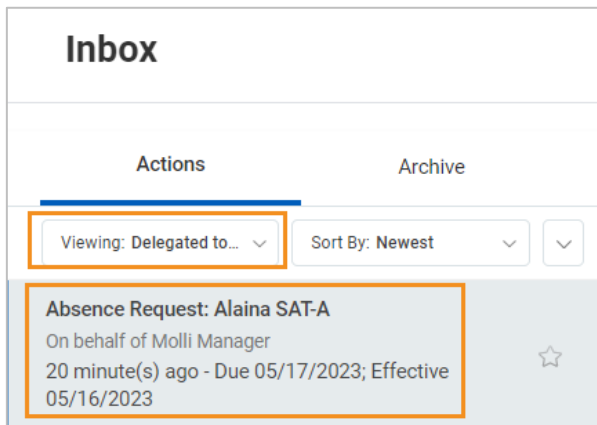
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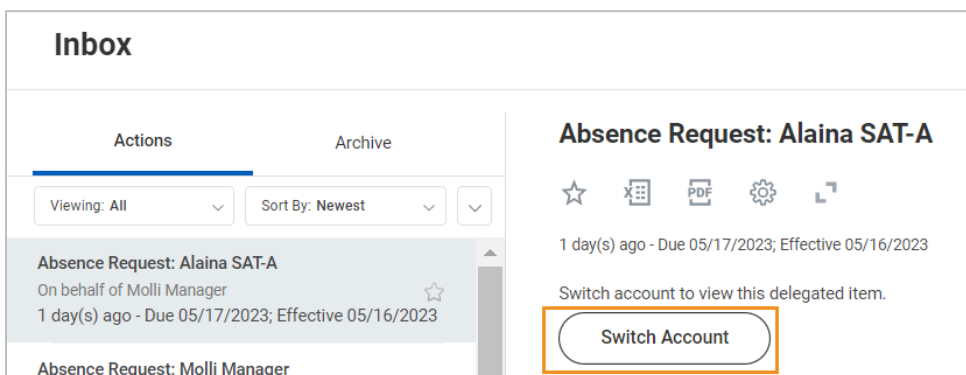
2. In the Actions tab, click **Viewing: All** and select **Delegated to Me**.



3. **Select** the item that has been delegated to you. It will show **on behalf** of the colleague who has delegated to you.



4. You will then be prompted to Switch Account. Click **Switch Account**.

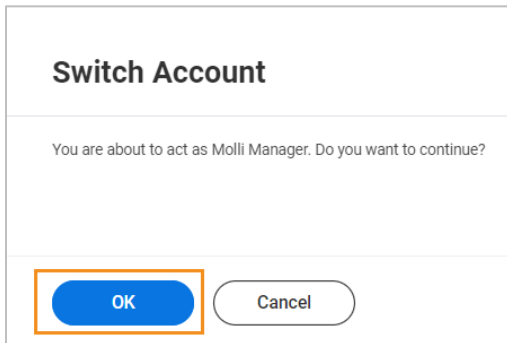


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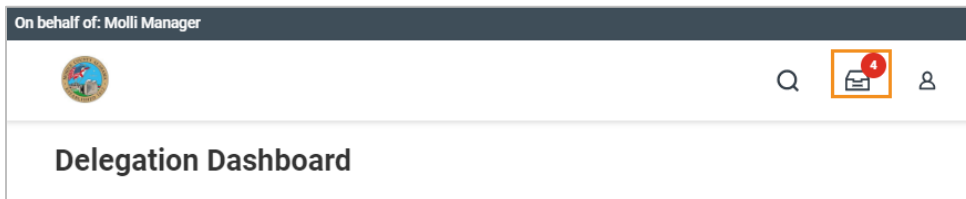
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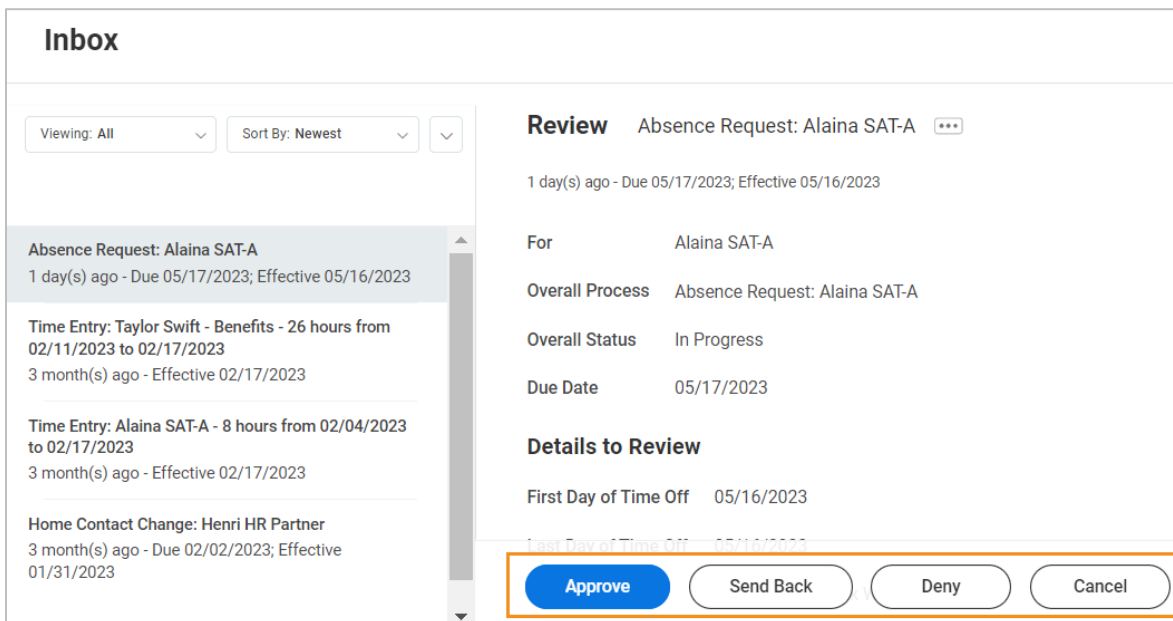
5. Click **OK**.



6. The **Delegation Dashboard** now displays. Click **Inbox** icon to review delegated tasks.



7. The delegated tasks can now be acted upon.

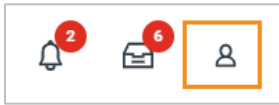




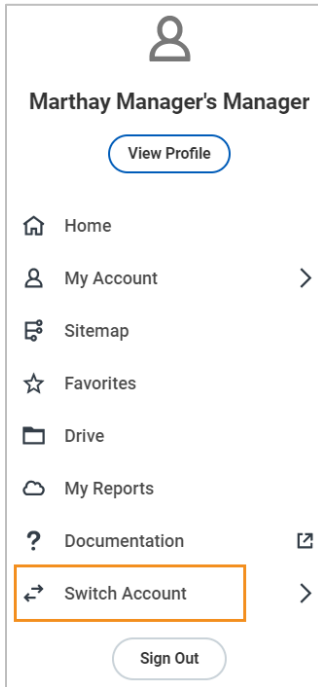
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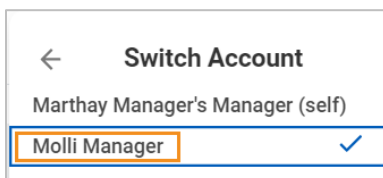
8. To access the Switch Accounts task for Delegations from your Profile, click on your **Profile** icon.



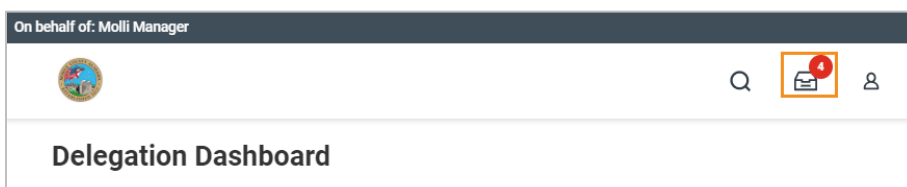
9. Click **Switch Account**.



10. **Select** the Account.



11. The **Delegation Dashboard** will now display. Click **Inbox** icon to review delegated tasks.



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12. The delegated tasks can now be acted upon.

Inbox

Viewing: All | Sort By: Newest

- Absence Request: Alaina SAT-A**
1 day(s) ago - Due 05/17/2023; Effective 05/16/2023
- Time Entry: Taylor Swift - Benefits - 26 hours from 02/11/2023 to 02/17/2023**
3 month(s) ago - Effective 02/17/2023
- Time Entry: Alaina SAT-A - 8 hours from 02/04/2023 to 02/17/2023**
3 month(s) ago - Effective 02/17/2023
- Home Contact Change: Henri HR Partner**
3 month(s) ago - Due 02/02/2023; Effective 01/31/2023

Review

Absence Request: Alaina SAT-A

1 day(s) ago - Due 05/17/2023; Effective 05/16/2023

For Alaina SAT-A

Overall Process Absence Request: Alaina SAT-A

Overall Status In Progress

Due Date 05/17/2023

Details to Review

First Day of Time Off 05/16/2023

Last Day of Time Off 05/16/2023

Approve **Send Back** **Deny** **Cancel**