

# General: Manage Delegations

## Overview

This job aid outlines how to manage delegations of your business processes approvals and reviews to another employee as well as act on behalf of another user. Delegation of specific business processes is typically intended for short-term usage coinciding with the end-date of a planned or unplanned absence or other circumstance that necessitates the delegation.

### Delegation of a Business Process


1. After logging into Workday, click your photo or image icon at the top right corner, as shown below, and click View Profile.
2. From the **Actions** button, click on **Business Process** and then **My Delegations**.
3. On the **My Delegations** report, you can manage your current business process delegations and review the tasks that have been assigned, approved, or reviewed.
4. To create a new delegation, click **Manage Delegations**.
5. At the top of the **Manage Delegations** screen, you can click on **Business Processes Allowed for Delegation** to see a list of all allowable business processes.
6. Fill in the available fields. Note: Fields with an asterisk is required.

The key fields are as follows:

- **Begin and End Date:** The date range in which you want this delegation to apply. A beginning date is required; if you leave the end date blank it will remain active indefinitely, best practice is to always end a delegation.
- **Delegate:** The employee(s) to whom you are delegating your tasks. Typically, you would choose just one, but you may choose several other employees.
- **Use Default Alternate:** Typically leave this checked. If checked, the manager of any listed delegate can function as an alternate for BP approvals and reviews in special situations. If unchecked, you can manually choose an **Alternate Delegate** below.
- Typically leave the **Start on My Behalf** field blank.
- In the **Do Inbox Tasks on My Behalf** column, your choices are as follows:
  - **For All Business Processes:** The employee will be able to complete all inbox tasks (e.g., Approve, Send Back, Review, etc.) for all business processes.
  - **For Business Process:** The employee will be able to complete inbox tasks for only the business processes you specify in this field.
  - **None of the above:** This is not typically used.

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- It is recommended you check the box to **Retain Access to Delegated Tasks in Inbox**. This will allow you to continue seeing inbox items as usual, even though your delegate may complete tasks for you.

7. Use the plus icon  at the top left of the grid to add as many new delegation rules as needed.

8. When finished, click **Submit**.

**Note:** Your delegation requests may route for approval as part of a business process before they take effect.

## Act on Behalf of Another User

1. After logging into Workday, click your photo or image icon at the top right corner, as shown below, and click View Profile. Select **Switch Account** from the menu below.
2. Selecting Switch Account presents you with a list of users who have delegated Inbox tasks or Initiating Actions to you. Select the user for whom you want to act as a delegate.
3. Once you switch accounts, Workday displays:
  - On Behalf of, followed by the name and photo of the delegator.
  - The Delegation Dashboard, which includes the Delegated Actions worklet, and from which you can take Initiating

Actions on any business processes that have been delegated to you by the user on whose behalf you are acting.

- The Inbox, which (when selected) contains only the Inbox tasks delegated to you by the user on whose behalf you are acting, and from which you can view the details and complete the tasks.

*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 Tasks steps, such as those found in the Onboarding business process.*

4. To initiate the action, click on the appropriate Report or Task available and follow the steps for the specific action.
5. To switch back to your Workday account, select Switch Account again.
6. Selecting your own name will return to your account.