Delegations in Workday

The Delegations in Workday tip sheet is for Managers and Delegates.

What is Delegation?

Delegation allows users to temporarily enable another user to perform functions on their behalf in Workday. This may be useful when a manager is out sick or on vacation and needs someone to cover any Workday-related tasks while they are away.

NOTE: Delegation and **Reassignment** are not the same. A delegated task belongs to the original owner, who would need to complete open tasks after the delegation period ends. Reassignment permanently assigns a task to another worker.

Three Types of Delegation

- **Delegate Inbox Tasks:** Delegate your entire Workday Inbox, or specific business processes from your Inbox, for a specified period.
- **Delegate the Initiation of a Business Process:** Delegate the Initiating Action of selected business processes. For example, a manager can delegate the ability to create expense reports to an administrative assistant.
- **Delegate a Single Task:** You can delegate a task directly from the Workday Inbox when a task is awaiting action and that task is one that can be delegated.

What Can I Delegate?

Many different business processes and tasks are enabled for delegation, and this list may update in the future. To see the current list, type "**My Delegations**" in the Workday Search bar and select the **My Delegations** report. On the next screen, select the **Business Processes Allowed for Delegation** tab. Here you will find all the processes you can delegate, including Workday Inbox tasks and initiation tasks.

Here are a few noteworthy tasks you can delegate. Many of these allow you to delegate related approvals via the delegation of the Workday Inbox.

- **Absences**: Correcting, entering, and requesting absences
- **Hire:** Hire employee
- **Time**: Enter, correct, approve time
- **Onboarding**: Onboarding setup
- **Payroll**: Request one-time payment
- **Termination**: Terminate employee

Who Can be Delegates?

You will be able to delegate to peers, superiors, and subordinates. For example, a manager can delegate to another manager or an administrative assistant.

How to Set Up a Delegate

1. Type "**My Delegations**" in the search bar and select the **My Delegations** report.
2. To set up a new delegate or edit an existing delegate, select **Manage Delegations**.
3. Select a **Begin Date**.
4. Select an **End Date**.
5. In the **Delegate** field, type and select one or more names to whom you are delegating.
6. If the delegate will initiate business processes on your behalf, select the task or tasks in the **Start on My Behalf** field.
7. If the delegate will perform tasks normally routed through you, select the appropriate options in the **Do Inbox Tasks on My Behalf** field.
    - To set up a delegate to approve absence requests, type and select the following in **For Business Process**: **Correct Time Off**, **Request Time Off**, and **Update Time Off Requests**.
    - To set up a delegate to approve time entry submissions, type and select the following in **For Business Process**: **Enter Time**, **Reported Time Batch Event**, and **Request Overtime**.
8. Select the **Retain Access to Delegated Tasks in Inbox** checkbox to view and modify the delegated task in your Inbox while it is delegated.
9. To add another delegate for a different type of transaction, select the plus **+** button in the table header.
10. Select **Submit**. Your delegation request routes to your manager for approval.

NOTE: Use the tabs to view details regarding delegating.

Delegate a Single Task

1. Navigate to your Workday Inbox.
2. Select **Task Actions** in the top-right corner of the opened Inbox task, select **Delegate Task**.
3. In the **Proposed Delegate** field, search for and select the name of the person to which you wish to delegate.
4. Select **Submit**.

Serving as a Delegate

If you are enabled as an approved delegate, you will receive a notification. Use the steps below to access the initiator's Workday Inbox on their behalf as their delegate.

1. Select your **Profile icon** at the top-right corner of the Workday page.
2. Select **Switch Account**.
3. Select the user for whom you are a delegate.
4. This will immediately take you to the Delegation Dashboard with specific delegated actions you can take on their behalf. If there aren't specific tasks listed, you may only have Inbox access. If so, select the Workday Inbox to see if anything requires approval or attention.
5. Once you've completed tasks on their behalf, select the profile icon again and select **Switch Account** to revert back to your Workday profile.