

# Workday – Delegation

In Workday, you have the ability to delegate tasks when you plan to be out of the office. You can delegate to your peers, manager or to those reporting to you.

#### **Delegate Tasks**

- 1) In Workday, on your Home Screen, click on the **Inbox icon**.
- 2) Click on Manage Delegations in the My Tasks menu.



= '		Ś
Ē	My Tasks	←
1	All Items	
Ċ	Saved Searches	~
	Filters	~
1	Archive	
5	Bulk Approve	
2,	Manage Delegations	

Delegations				1
takhi Ihiga				
ent Delegations Current Task Delegation	ns Delegation History Delegate	d Tasks Business Processes allowed for Delegation		
ns				≣ ≣ ╤ ╦ 。º 🏾 🖽
gin Date	End Date	Delegate	Retain Access to Delegated Tasks within My Tasks	*
		No items available.		

- 4) Enter the following details:
  - a. **Begin Date**: Date you want tasks to be delegated to the individual.
  - b. **End Date**: Date you want the delegation to end, if applicable. Leaders with Executive Assistants may choose not to have an end date.
  - c. Delegate: Click on Peers, Superiors or Subordinates by Supervisory Organization to see a list of names and select the name.

Search	:=
Desa	
reers	· · · ·
Superiors	>



- d. Start On My Behalf: Click on
  - i. **By Business Process Type** and select the specific process OR
  - ii. All and select **Ctrl A** on your keyboard to select all.
- e. Do My Tasks On My Behalf: Select
  - i. For all Business Processes for all tasks OR

start On My Behalf	
Search	:=
By Business Process Type	>
All	>

ii. For Business Process then select the appropriate business processes from the menu.

**Note**: Make sure to check **Retain Access to Delegated Tasks within My Tasks**. This allows you to retain access to the tasks and you can also work on these. This is especially important for long term delegation.

Delegatio	n 1 item		С		= =
	*Begin Date	End Date	*Delegate	Start On My Behalf	Do My Tasks On My Behalf
0	A	В	Do My Tasks On	My Behalf	For all Business Processes     For Business Processe     For Business Process     For Business Process     For Business Process     For Business Process     For Business Processe     For Business Processes     For Businesses     For Busine
_			For all E	Business Processes	Delegation Rule >
			For Bus	iness Process	:=
			None of	f the above	

5) Select files to upload if applicable.

	Drop files here	
	or	
	Select files	



- 6) Click Submit.
- 7) Your manager will receive a task in Workday to approve the delegation.

### You have submitted

Up Next: Christine Homer | Approval by Manager | Due Date 06/15/2024

View Details

## **Delegation Approval**

The manager will receive the task to Approve or Deny.

Overall Process D Overall Status Ir	all Process     Delegation for Rakhi Ihiga on 07/01/2024       rall Status     In Progress								
ue Date 0	Date 06/15/2024								
> Business Pro	N cesses allowed for Delegation								
lew Delegation 1 iter	1			<b>≞</b> ⊡ .	, I 🖩 🖪				
*Begin Date	End Date	*Delegate	Start On My Behalf	Do My Tasks On My Behalf					
07/01/2024	07/05/2024	Jill Ostendorf	Change Emergency Contacts Change My Personal Information Correct My Absence Create Expense Report Create Idea More (12)	For all Business Processes     For Business Process Retain Access to Delegated Tasks within My Tasks					
enter your co	Deny Save fo	or Later Cancel							

### Steps to Complete Tasks as a Delegate

1) The delegate will have the task on their home screen in Workday. Once in the task, click **Switch Account** to complete the task.





<ol> <li>Click <b>OK</b> to confirm you want to switch accounts.</li> </ol>	Switch Account
OK Cancel	You are about to act as

3) Now on behalf of the individual, click on the task then click **Get Started**.

Complete Mana	ger Evaluation		X II PDF
Manager Evaluation	: 2023- 2024 Administrative Annual Review Template:		
Review Period 07/01/2023 - 0	6/30/2024		
• <b><u>STOP:</u></b> Review the position	n description to help with your assessment. If it's not up to date be sure to v	work with Human Resources to get it updated.	
If you will be recommendi     Form. This form provides	ng that this employee receive the highest overall rating available, you will n justification for the rating and will be reviewed by the Executive Team for th	eed to complete the <b>Employee Highest Overall Rating</b> heir approval.	
If the employee is going to Performance Improvement	preceive a <u>"Opportunity For Improvement"</u> score in more than one category t Plan is necessary.	y or as an overall rating, please contact HR to determine if	а
The performance review p Employee, Employee Ackr	rocess in Workday includes Employee Self-Assessment, Manager Review, wwledgement and Manager Acknowledgement.	Manager plus 1 review, Meeting between Manager and	
			-
Get Started		_3	
Get Started		2	0
Get Started	pleted the delegated tasks, click on		
Get Started nce you have com e profile on the top	pleted the delegated tasks, click on o right of the Home screen. Then click		
Get Started nce you have com e profile on the top witch Account.	pleted the delegated tasks, click on o right of the Home screen. Then click	On behalf of:	
Get Started nce you have com te profile on the top witch Account. a. Select your a	pleted the delegated tasks, click on o right of the Home screen. Then click account ending with <b>self</b> .	On behalf of:	
Get Started nce you have com e profile on the top witch Account. a. Select your a	pleted the delegated tasks, click on o right of the Home screen. Then click account ending with <b>self</b> .	On behalf of: View Profile	
Get Started nce you have com e profile on the top witch Account. a. Select your a	pleted the delegated tasks, click on o right of the Home screen. Then click account ending with <b>self</b> .	On behalf of: View Profile & Delegation Dashboard ? Documentation	
Get started nce you have com e profile on the top witch Account. a. Select your a	pleted the delegated tasks, click on o right of the Home screen. Then click account ending with <b>self</b> . <b>Switch Account</b>	Con behalf of: View Profile Lelegation Dashboard ? Documentation ↓ Switch Account	
Get Started nce you have com e profile on the top witch Account. a. Select your a	pleted the delegated tasks, click on o right of the Home screen. Then click account ending with <b>self</b> . <b>Switch Account</b> Rakhi Ihiga (self)	Con behalf of: View Profile A Delegation Dashboard ? Documentation C Switch Account	
Get started nce you have com the profile on the top witch Account. a. Select your a	pleted the delegated tasks, click on o right of the Home screen. Then click account ending with <b>self</b> . <b>Switch Account</b> Rakhi Ihiga (self)	Con behalf of: View Profile Delegation Dashboard Commentation Commentation Commentation Commentation Commentation Commentation Commentation Commentation Commentation	



					CELONADD SCHOOL OF	
1) In Wo	orkday, on your Home	= MENU				
2) Click	on <b>Manage Delegati</b>	ions in the My Tasks mer	u.	M	y Tasks	←
				🖺 🛛 All Ite	ms	
				🕒 Saved	I Searches	~
				℅ Filters	3	~
				Archiv	ve	
3) Click	on <b>Manage Delegati</b>	ons to update/cancel dele	gations.	E Archiv	<b>ve</b> pprove	
3) Click	on <b>Manage Delegati</b>	ons to update/cancel dele	gations.	Archiv       Bulk A       Anage	<b>ve</b> pprove je Delegations	
3) Click	on <b>Manage Delegati</b>	ons to update/cancel dele	egations. Business Processes allowed for Delega	I Archin	<b>ve</b> pprove je Delegations	
3) Click	on <b>Manage Delegati</b>	ons to update/cancel dele	egations. Business Processes allowed for Delega	Archin     Archin     Bulk A     A     A     A	ye pprove te Delegations x⊞ ⊞ ╤ [	a .r 🎟 🖽
3) Click Current Delegation Titem Begin Date	on Manage Delegati	Delegation History Delegated Tasks	Business Processes allowed for Delega	Image: Constraint of the second se	ye pprove te Delegations (김) (王) (국 문 ain Access to Del ks within My Tasi	∃ L" Ⅲ Ⅲ

- 4) Update or cancel the delegation by following the below steps:
  - a. To update, edit the **Begin Date**, **End Date**, **Delegate**, **Start On My Behalf** and **Do My Tasks On My Behalf** as needed.
  - b. To cancel the delegation, click on the minus (-).

+	*Begin Date	End Date	*Delegate	Start On My Behalf	Do My Tasks On My Behalf
	06/28/2024	07/08/2024	× David Aragoni … ∷ ∷	:=	<ul> <li>For all Business Processes</li> <li>For Business Process</li> <li>For Business Process</li> <li>Image: Second second</li></ul>

5) Click **Submit** for your manager to approve the changes.

