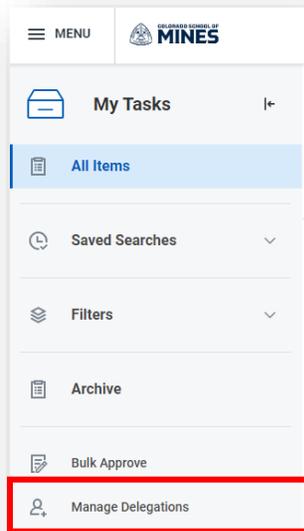
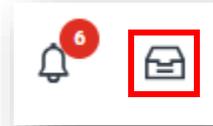


## Workday – Delegation

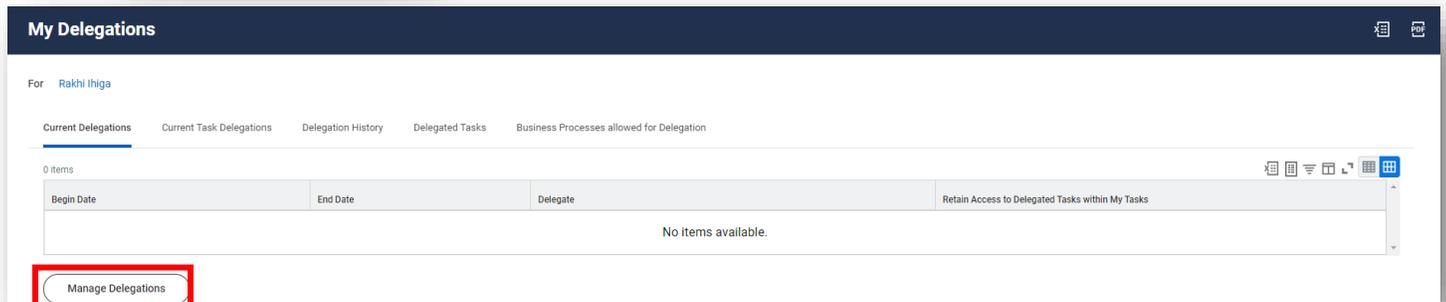
In Workday, you have the ability to delegate tasks when you plan to be out of the office. You can delegate to your peers, manager or to those reporting to you.

### Delegate Tasks

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

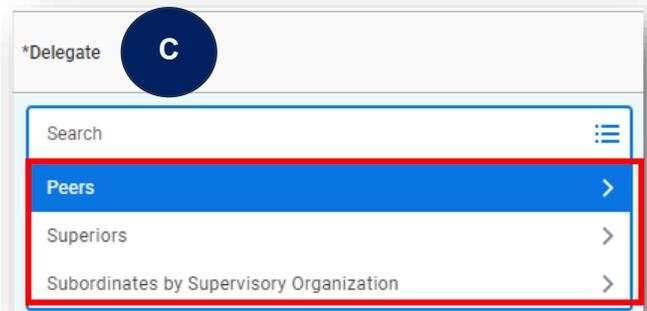


- 3) Click on **Manage Delegations** to schedule delegations.

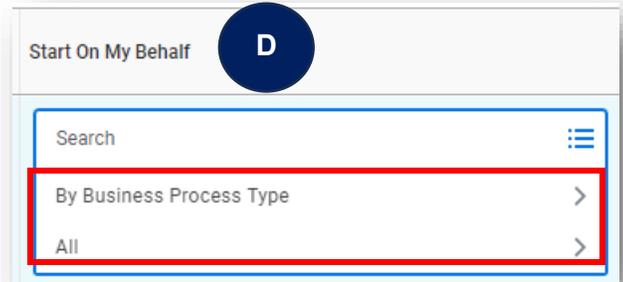


- 4) Enter the following details:

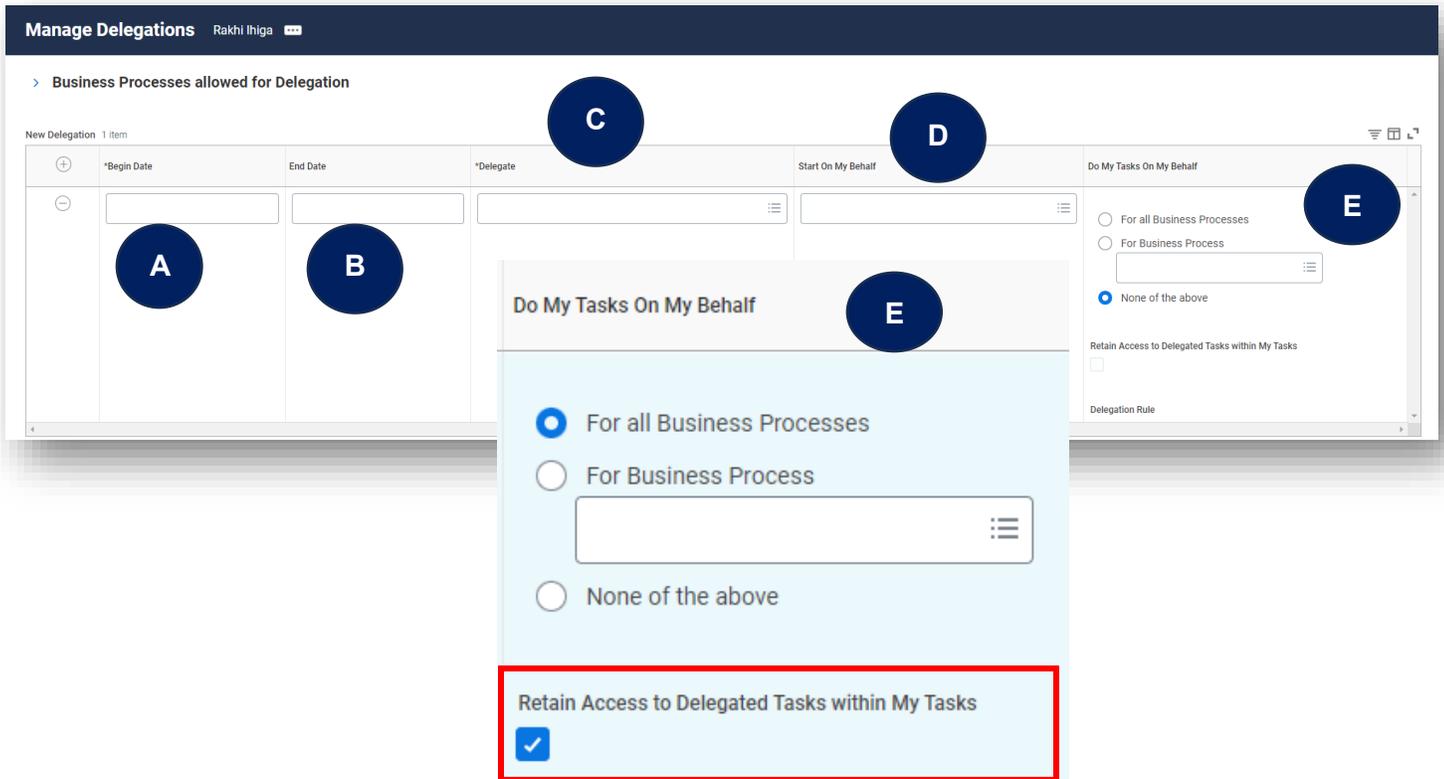
- a. **Begin Date:** Date you want tasks to be delegated to the individual.
- b. **End Date:** Date you want the delegation to end, if applicable. Leaders with Executive Assistants may choose not to have an end date.
- c. **Delegate:** Click on **Peers**, **Superiors** or **Subordinates by Supervisory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



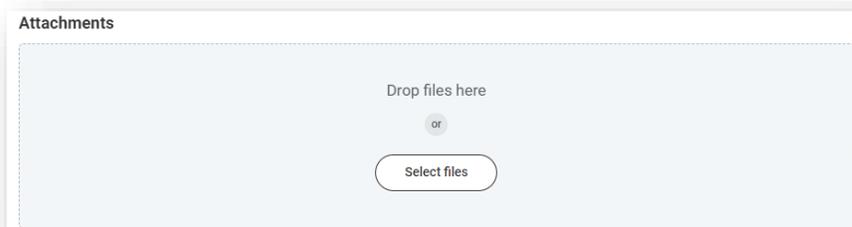
- d. **Start On My Behalf:** Click on
  - i. **By Business Process Type** and select the specific process OR
  - ii. **All** and select **Ctrl A** on your keyboard to select all.
- e. **Do My Tasks On My Behalf:** Select
  - i. **For all Business Processes** for all tasks OR
  - ii. **For Business Process**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



5) Select files to upload if applicable.



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

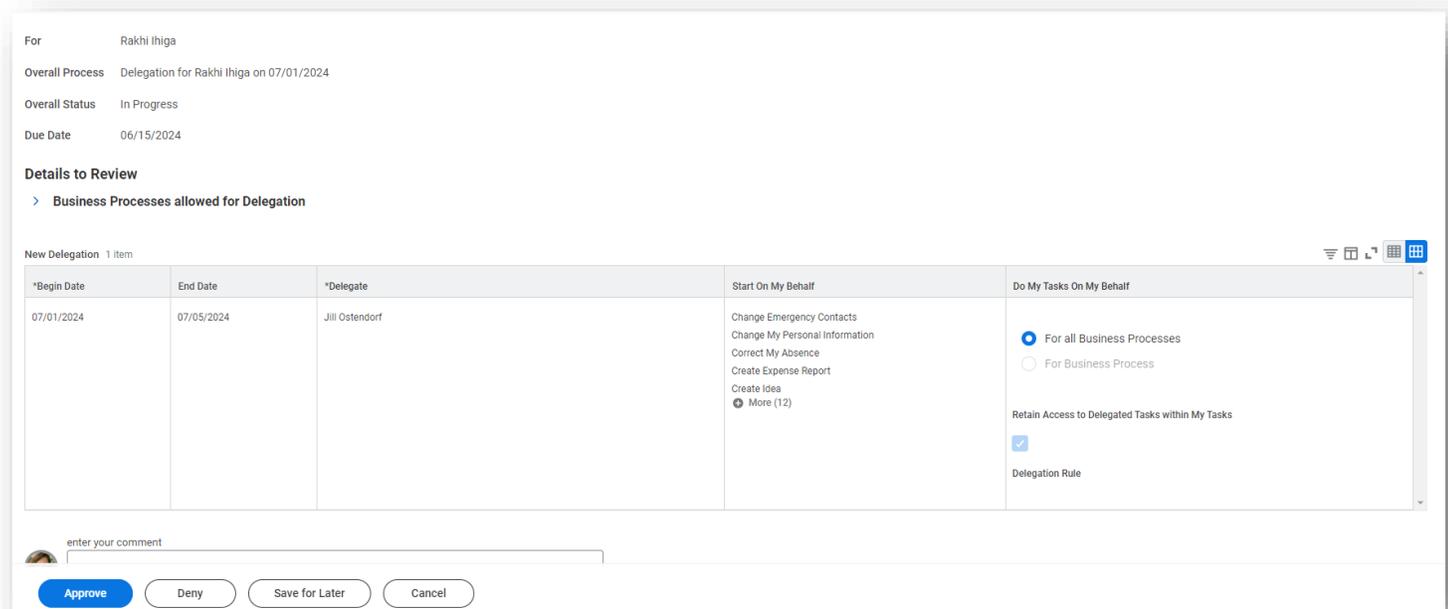
**You have submitted**

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**.



For: Rakhi Ihiga

Overall Process: Delegation for Rakhi Ihiga on 07/01/2024

Overall Status: In Progress

Due Date: 06/15/2024

**Details to Review**

> Business Processes allowed for Delegation

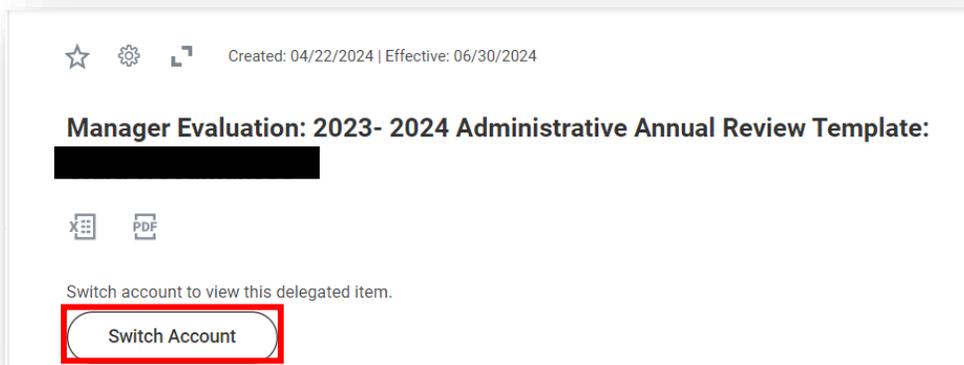
New Delegation: 1 item

*Begin Date	End Date	*Delegate	Start On My Behalf	Do My Tasks On My Behalf
07/01/2024	07/05/2024	Jill Ostendorf	<ul style="list-style-type: none"> <li>Change Emergency Contacts</li> <li>Change My Personal Information</li> <li>Correct My Absence</li> <li>Create Expense Report</li> <li>Create Idea</li> <li>More (12)</li> </ul>	<ul style="list-style-type: none"> <li><input checked="" type="radio"/> For all Business Processes</li> <li><input type="radio"/> For Business Process</li> </ul> <p>Retain Access to Delegated Tasks within My Tasks</p> <input checked="" type="checkbox"/> <p>Delegation Rule</p>

enter your comment

## 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.



☆ ⚙️ 📄 Created: 04/22/2024 | Effective: 06/30/2024

**Manager Evaluation: 2023- 2024 Administrative Annual Review Template:**

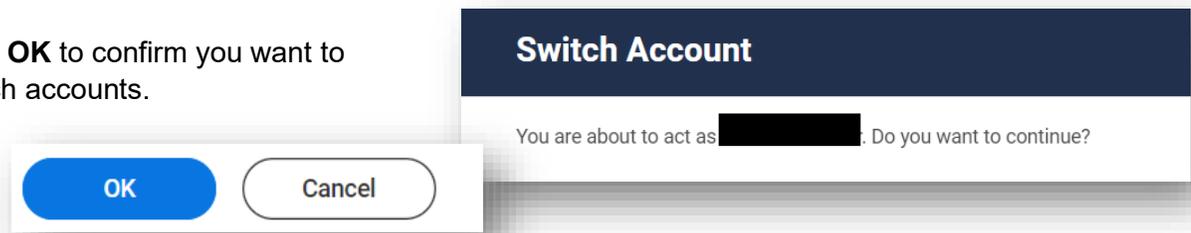
📄 PDF

Switch account to view this delegated item.

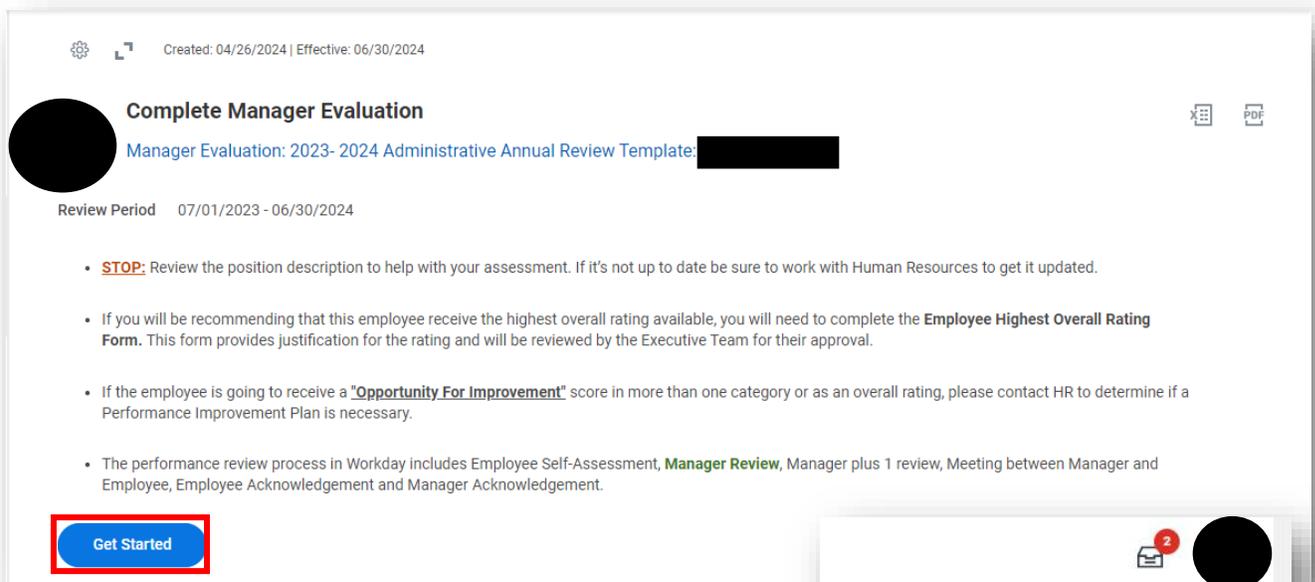
**Switch Account**



2) Click **OK** to confirm you want to switch accounts.

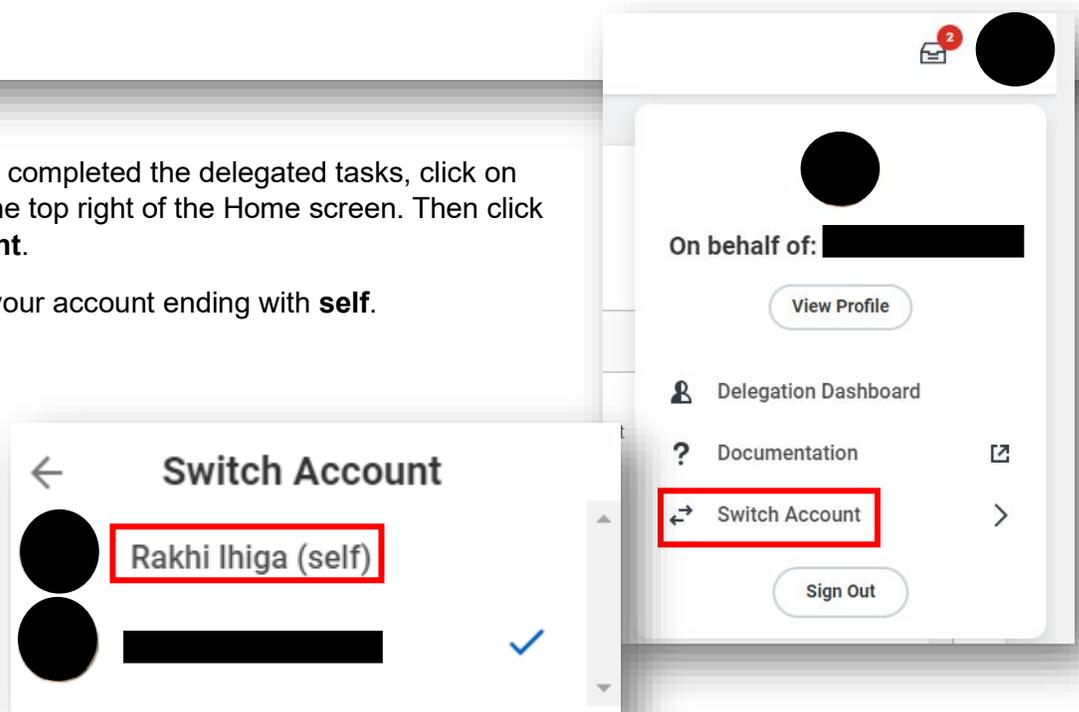


3) Now on behalf of the individual, click on the task then click **Get Started**.



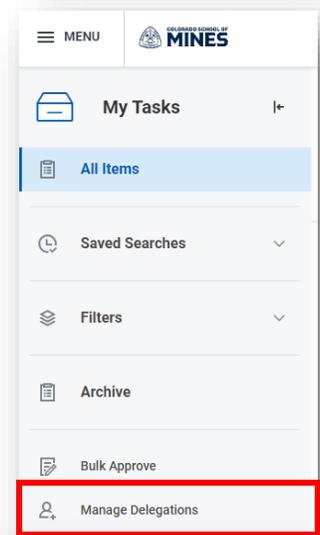
4) Once you have completed the delegated tasks, click on the profile on the top right of the Home screen. Then click **Switch Account**.

a. Select your account ending with **self**.

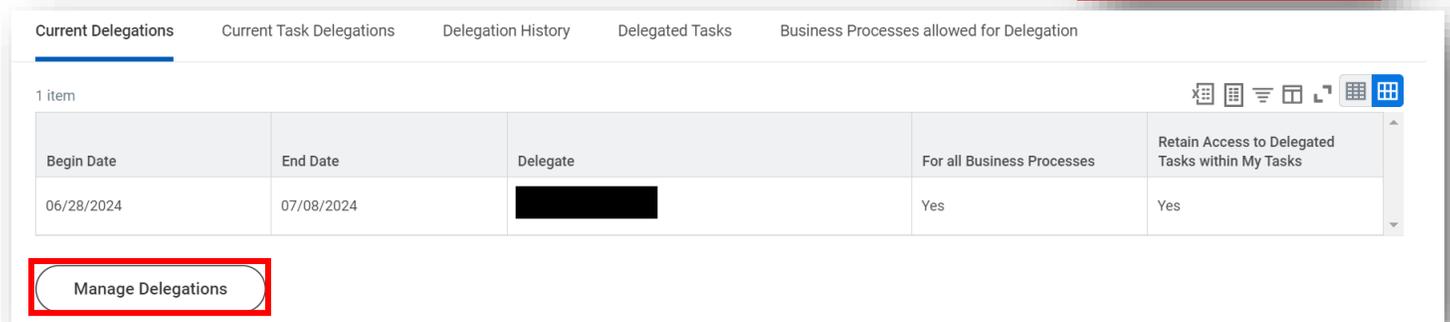


### Steps to Update/Cancel Delegation

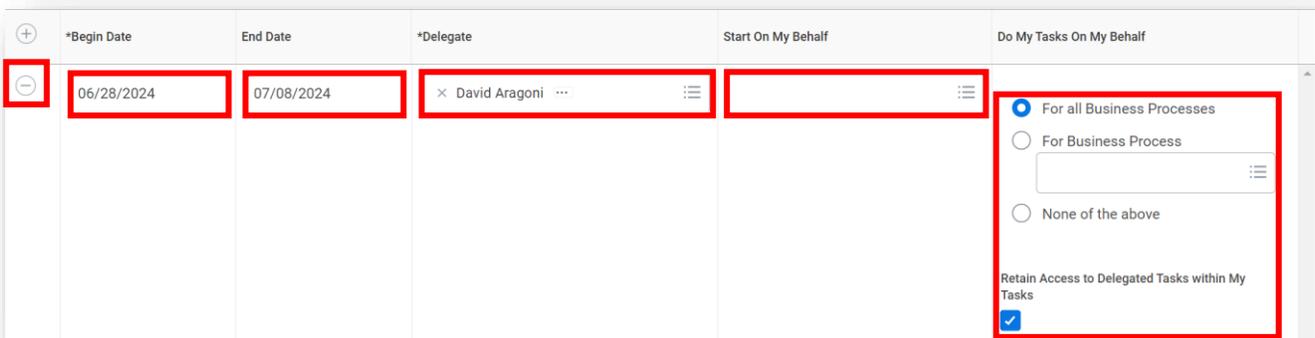
- 1) In Workday, on your Home Screen, click on the **Inbox icon**.
- 2) Click on **Manage Delegations** in the **My Tasks** menu.



- 3) Click on **Manage Delegations** to update/cancel delegations.



- 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 (-).



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

