Delegation Process

How to Delegate in Workday:

1) Type 'my delegate' in search bar in Workday
2) Select 'My Delegations'
3) Click on 'Manage Delegations' button and the Business Processes allowed for Delegation box will pop up
4) Enter the 'Begin Date' and 'End Date' for the time period you want to delegate your Workday tasks.
5) Type in the name of the person in the 'Delegate' box that you want to delegate your tasks to in Workday. Their name will appear and you can select it.
6) The 'Use Default Alternate' will be checked and the 'Alternate Delegate' will autofill with your manager's name. If you want to change the Alternate Delegate, uncheck the default box and fill in the name of your alternate delegate.
7) The 'Start On My Behalf' allows you to delegate certain actions to your delegate – such as hiring. We do not recommend that you delegate ANY 'Start On My Behalf' tasks. Just leave this box blank.
8) The 'Do Inbox Tasks On My Behalf' allows you to select 'For all Business Processes" or you can scroll through the 'For Business Process" box and select each business process you want to delegate. We recommend that you select 'For all Business Processes'.
9) Check the 'Retain Access to Delegated Tasks in Inbox' if you want to continue to see all items that would come into your inbox. Click 'Submit'.
10) Your delegation request will flow to your manager for approval. Once approved, your delegate will begin receiving submitted items into their inbox.

How to Manage Tasks that have been Delegated to You in Workday

1) When tasks have been delegated to you, you will begin receiving those items in your Workday inbox. When you click the item, you will see a description of the item requested and the phrase 'On behalf of' and the name of the person that has delegated their inbox to you. There will be a prompt to 'Switch Account'. Click the 'Switch Account' button and click 'OK' and 'Done'.
2) After approving all inbox items from that delegate, you can click on the cloud button and switch accounts back to your own account.

General Information about Delegation:

If delegate is requesting something for themselves (i.e PTO, Requisition), their request will flow to the Alternate Delegate for approval.

Once you set up your delegate and it is approved, any items left in you inbox will flow over to your delegate to handle.