

Quick Reference Guide: *Manage Delegations***Keep in mind**

- An employee is able to delegate their tasks to another worker who holds the same or similar role.
- You can specify the time period for which you would like the delegation to be effective.

**Information Needed**

- Begin and End Date
- Name of person the delegated tasks are going to
- Business processes to be delegated (optional)

**Steps:**

Setting up a delegation allows another employee to complete inbox tasks and/or initiate business processes on your behalf. Delegations apply to all tasks/business processes covered by the delegation for a specified period, while reassigning a task only moves that one specific task.



Your role should only be delegated to someone who holds the same or similar role to you (i.e. Budget Partners can delegate their role to an HR Partner in the same org). If there is another individual in your organization(s) that holds your role, you do not need to set up a delegation since all of the same tasks will appear in their inbox. You can establish a timeframe for the delegation, as well as the specific business processes you want performed on your behalf.

1. From the **Search** field, enter *My Delegations* and click on the result. You can also go to the Inbox, select the down arrow next to the Viewing: and Sort By: fields and select *My Delegations* from there.
2. View the **Current Delegations** tab to view existing delegations.
3. Click the **Manage Delegations** button to add a new delegation or update an existing delegation.




Current Delegations    Current Task Delegations    Delegation History    Delegated Tasks    Business Processes allowed for Delegation

0 items Turn on the new tables view

Begin Date	End Date	Delegate	Retain Access to Delegated Tasks in Inbox
No Data			


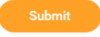

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4. Enter a **Begin Date** and **End Date** for the delegation.
5. Use the **Prompt**  icon within the **Delegate** field to select one or more delegates.
6. Use the **Prompt**  icon within the **Start on My Behalf** section to select one or more delegates that can initiate a task on your behalf. (This field is optional; you do not have to allow your delegate the ability to initiate business processes as you.)
7. In the **Do Inbox Tasks On My Behalf** section, select one of the following choices:
  - a. **For all Business Processes**
  - b. **For Business Processes** – In this case, use the **Prompt icon**  to select one or more delegates.
  - c. **None of the above** – Leave this as the default if you wish to have no one act on tasks that come to your Workday Inbox.



For Inbox actions, HR Partners can elect to delegate all business processes, only some, or none. This is very different than initiating business processes and should be treated as such.

8. Add additional rows by clicking the **Plus**  icon for as many unique delegations you wish to add.
9. Click on the **Submit Icon**  to submit this task.
10. You can see who is **Up Next** in the process. Please note that all delegation requests require approval from the Workday team. If your delegate does not have a confidentiality agreement on file, they will need to complete one.
11. Click the **Done Icon**  to complete this task.