

Overview

This document explains how to perform tasks that have been delegated to you in Workday.

- The recommended browser for accessing Workday is Google Chrome. However, Mozilla Firefox and Apple Safari may also be used.

Considerations by Institution

- None

Icons Referred to in This Document



Home



Prompt



Related Actions



Required Field



Notification



My Tasks



Worker Profile

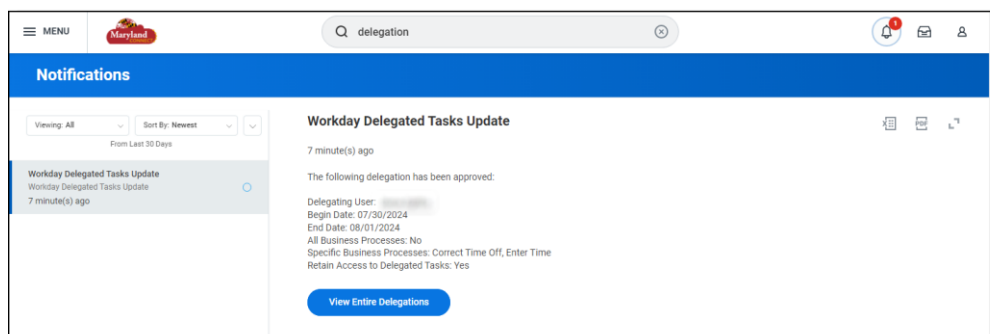


Switch Account

About Delegated Tasks

Notes:

- When a user delegates a task, Workday generates a notification in the system that indicates the delegating user; the tasks and actions being delegated; and the beginning and end dates for delegations.
- Any tasks that would otherwise require you to review and self-approve your own Workday transactions will instead route automatically to an Alternate Delegate for completion.
- Once a delegated task requires your action, Workday automatically generates email and push notifications to indicate that you have a delegated task waiting on your action.
- At the conclusion of the delegation period, any incomplete tasks revert to the delegating user.
- To review delegated tasks, select **Notifications**, choose the **Workday Delegated Tasks Update Item**, then select **View Entire Delegations**.



- In addition, you can find a full list of tasks delegated to you by accessing the **View My Delegation Assignments** report.

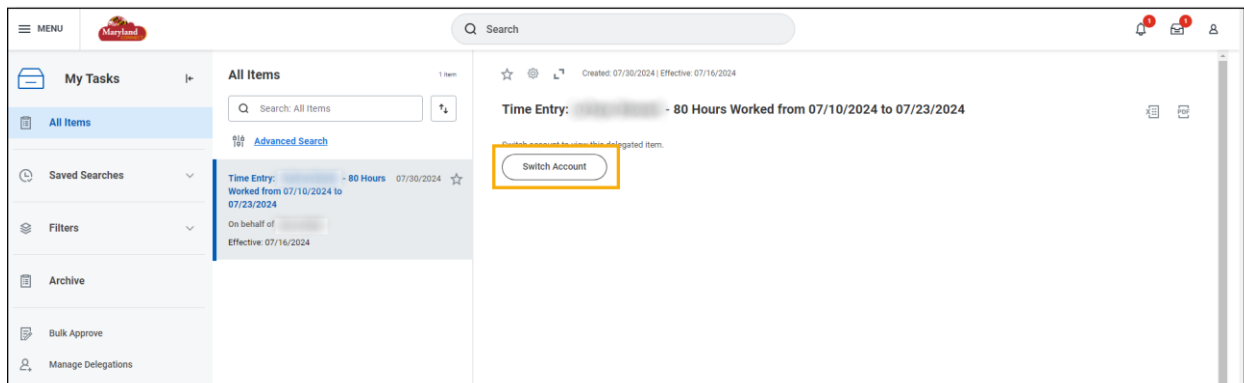
Accessing Delegated Tasks

Notes:

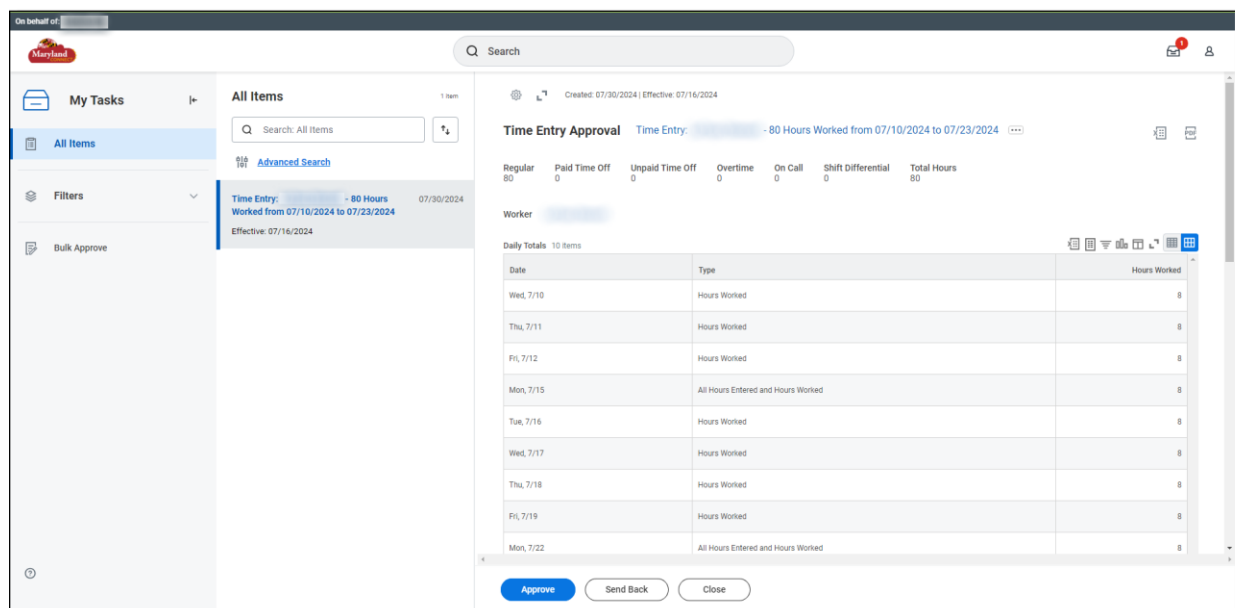
- Workday automatically generates a task in the **All Items** section of your **My Tasks** folder when a task is delegated to you.
- Delegates receive access to the tasks that the delegating user assigns to them for completion via the Delegation Dashboard.
- To view all tasks currently delegated to you, use the **All Delegated Tasks** report.

1. Open your **My Tasks** folder and select **All Items**.
2. The All Items folder displays.
3. Locate the delegated task requiring completion.

Note: Delegated tasks include the phrase ***“On behalf of”*** and the delegating user’s name below the task title, and a **Switch Account** button in the body of the task.

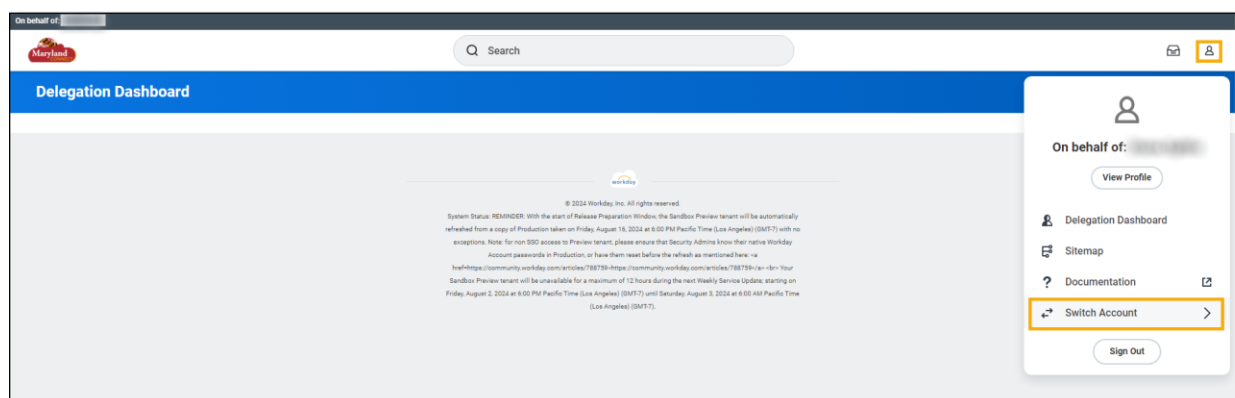


4. Select **Switch Account**, then select **OK** on the confirmation pop up window.
5. The Delegation Dashboard displays.
6. Select the **My Tasks** icon.
7. The My Tasks inbox displays.
8. Locate the delegated item and complete the task.



Notes:

- The process history for the task updates to indicate that the task has been completed on behalf of the delegating worker.
 - Once completed, the item disappears from your All Items folder.
9. To return to your Workday account, select the **Worker Profile** icon.
 10. Select **Switch Account**.



11. Select **Your Name (self)** to return to your homepage.

Notes:

- The completed task moves to the delegating worker's **Archive** folder.
- Once the delegation period ends, or the delegating user rescinds their delegation, you will stop receiving tasks in your My Tasks. You will also no longer be able to use **Switch Account** to access their Delegation Dashboard.