

Overview

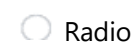
This document explains how employees can delegate tasks to other workers.

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

Considerations by Institution

- None

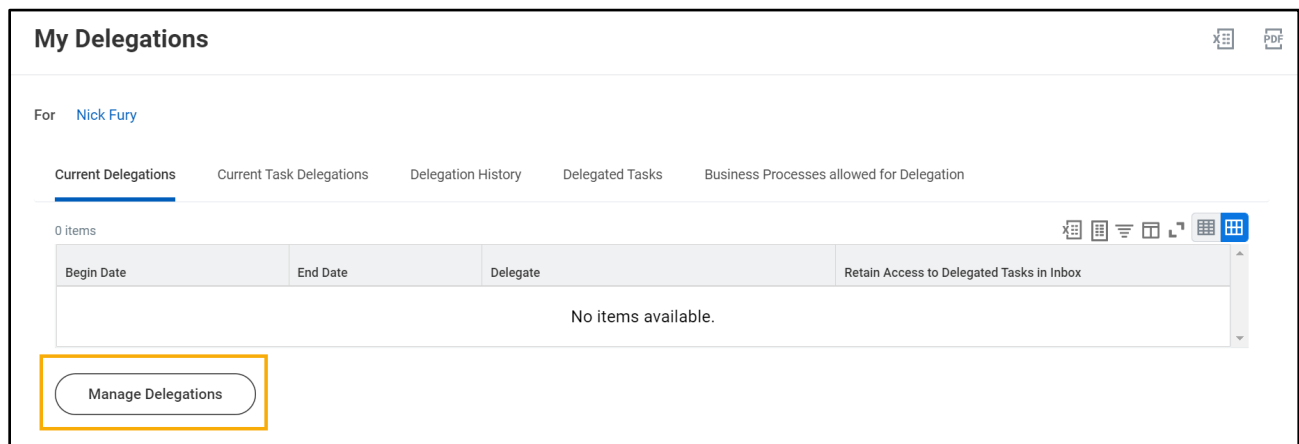
Icons Referred to in This Document



Adding a Delegate

- Enter **My Delegations** into the Search bar and select the report.
- The My Delegation report displays.
- Select **Manage Delegations**.

Note: The Manage Delegations task also allows users to edit the settings for existing delegations.



My Delegations

For Nick Fury

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

0 items

Begin Date	End Date	Delegate	Retain Access to Delegated Tasks in Inbox
No items available.			

Manage Delegations

- The Manage Delegations page displays.
- Select **Add** in the New Delegation table to add a delegate.
- Use the **Calendar** to select the **Begin Date**.
- Use the **Calendar** to select the **End Date**.
- Use the **Delegate Prompt** to choose the **employee(s)** being assigned the delegated task.
- (Optional) Use the **Alternate Delegate Prompt** to choose **alternate employee(s)** for the task.

Notes:

- Alternate Delegates only receive tasks that directly relate to the Primary Delegate, and which would otherwise require the primary to self-approve their own transactions.
- An Alternate Delegate may be automatically selected.
- Depending on the delegate, this may not be edited if there is no prompt to do so.

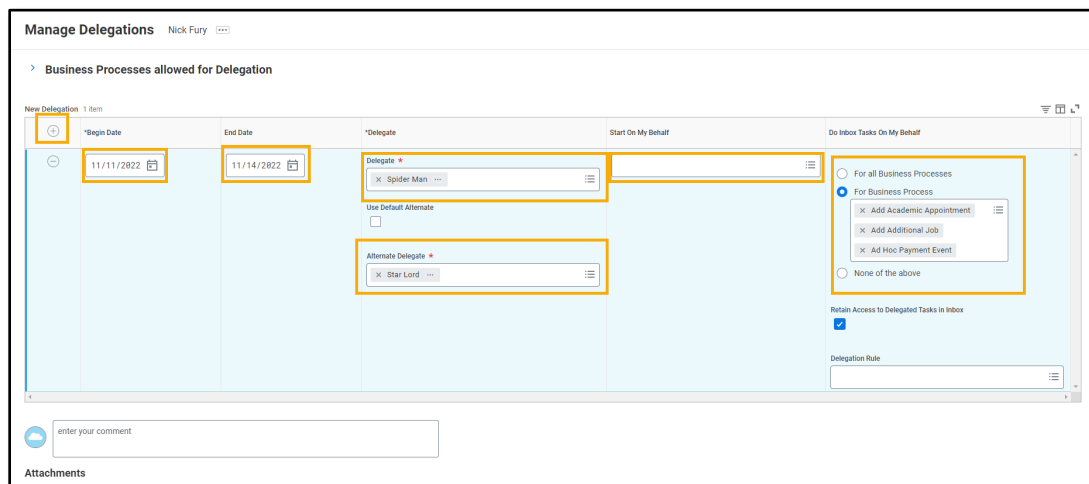
10. Use the **Start On my Behalf Prompt** to choose the **business processes or tasks requiring delegation**.

11. Select the appropriate **Do My Tasks on My Behalf Radio** for the delegated tasks.

Note: Options include: **All Business Processes**, which routes all tasks that generate an Item to My Tasks to the delegate; **For Business Process**, which allows the user to specify the routing of individual tasks to individual delegates; or **None of the Above**, which does not re-route Workday Items to delegates.

12. (Optional) Select the check box to Retain Access to Delegated Tasks within My Tasks.

Note: This may automatically be checked.



13. (Optional) Enter any **comments** regarding this delegation in the **Comments** text box.

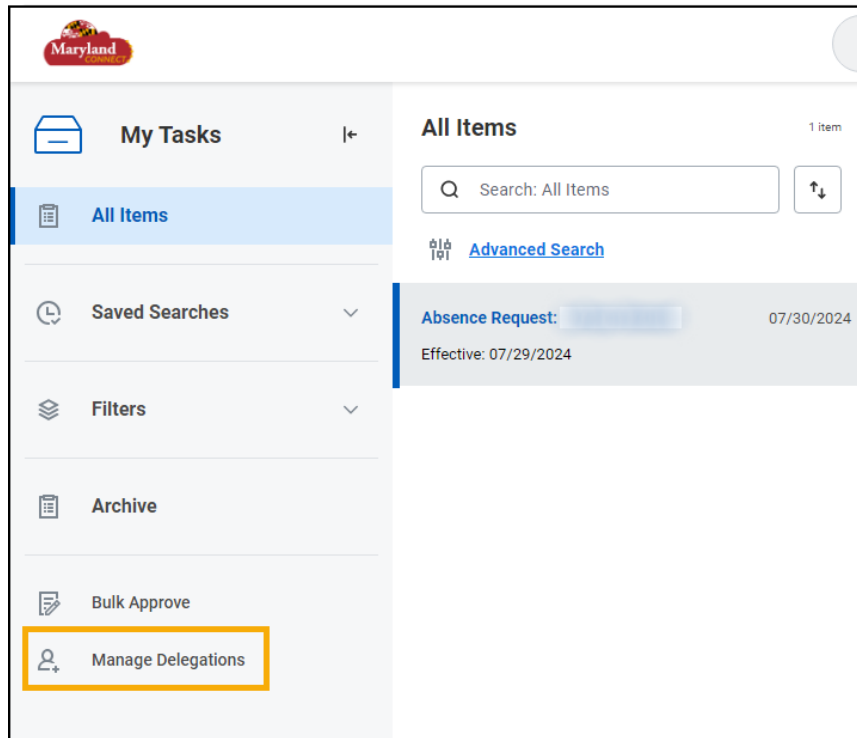
14. Select **Submit**.

Notes:

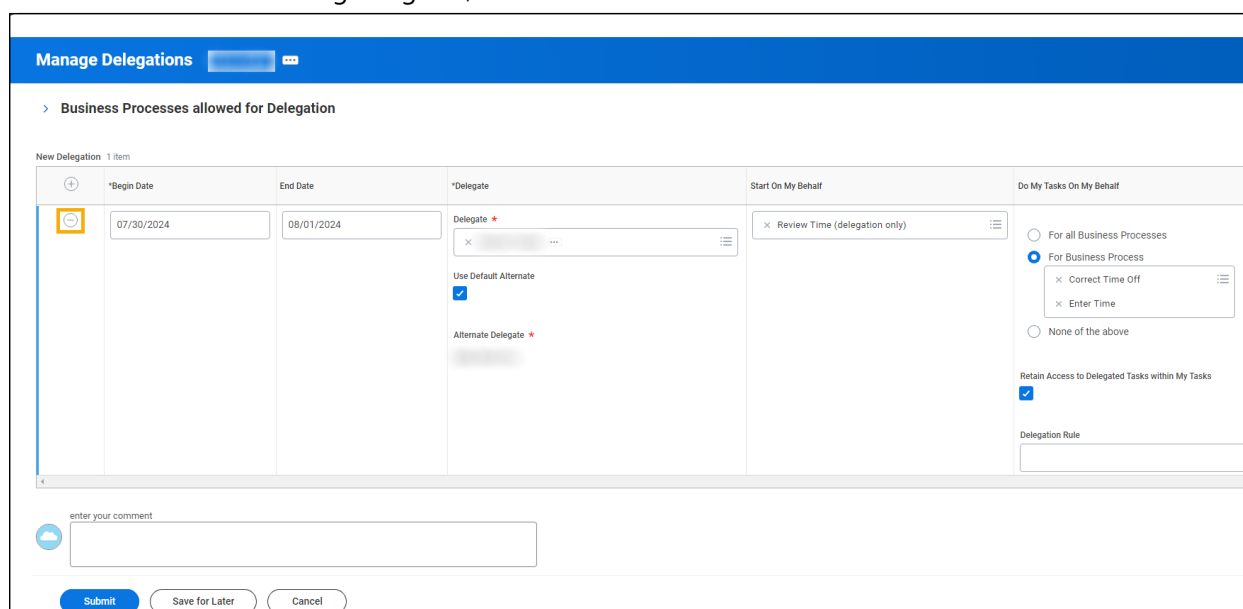
- If the delegation includes the ability to create an item, an Alert displays, indicating that this will allow the delegate access to all previously created items of the same type.
- Once submitted, the employee's manager receives an Item in My Tasks to review and approve the delegation request.
- Once approved, the initiator and the delegate(s) receive a notification outlining the tasks and timeline regarding the delegation. In addition, the delegate(s) receive email and push notifications related to the tasks and processes delegated to them.

Ending Delegations

1. Open your **My Tasks** folder and select **Manage Delegations**.



2. The Manage Delegations page displays.
3. Select **Manage Delegations**.
4. Locate the item being delegated, then select **Remove Row**.



The screenshot shows the 'Manage Delegations' page. At the top, there is a blue header with the title 'Manage Delegations'. Below the header, there is a section titled 'Business Processes allowed for Delegation'. The main area contains a table for delegating tasks. The table has columns for 'Begin Date', 'End Date', 'Delegate', 'Start On My Behalf', and 'Do My Tasks On My Behalf'. The 'Begin Date' is set to 07/30/2024 and the 'End Date' is set to 08/01/2024. The 'Delegate' column shows a dropdown menu with 'Review Time (delegation only)' selected. The 'Do My Tasks On My Behalf' column has radio buttons for 'For all Business Processes', 'For Business Process', and 'None of the above'. The 'For Business Process' option is selected, and a dropdown menu shows 'Correct Time Off' and 'Enter Time'. Below the table, there is a section for 'Retain Access to Delegated Tasks within My Tasks' with a checkbox that is checked. At the bottom, there is a 'Delegation Rule' section with a text input field. Below the form, there is a comment field with the placeholder text 'enter your comment' and three buttons: 'Submit', 'Save for Later', and 'Cancel'.



5. Select **Submit**.

Notes:

- You will then receive a Notification indicating that Delegation Access to your tasks has been revoked for the delegate.
- Once revoked, the delegate can no longer perform the actions and/or business processes that had been delegated to them.