Delegation

A person who has a Management Partner, HR Partner or Finance Partner role, or other role that initiates or approves business processes may need (or want) to have someone else initiate or approve certain business processes.

Important: Users who will act as delegate must have the same security role(s) as the user who is delegating to them.

Delegations can be done on a one-time basis, or for a specific period of time, if for example the approver is on vacation. Delegation temporarily reassigns your tasks to another user, enabling that user to perform individual actions on your behalf. Your delegate has access restricted to the tasks you have delegated.

Note: Managers can also use delegation and delegate to allow additional users the ability to act upon Request Time Off events for their staff.

If a unit has more than one person who holds some assigned roles, delegation may not be necessary as others in the unit with that role can initiate or approve as appropriate.

Options are:

Create a delegation to initiate business processes on your behalf: Enables you to delegate the initiating action of certain business processes events in order for another user(s) to act on behalf of you.

1) Select the Related Actions and Preview icon next to your name

2) In the Available Actions menu on the Worker Preview pane, select Business Process > My Delegations.

3) On the My Delegations page, click the Manage Delegations button to access the Manage Delegation page.

4) Enter a Begin Date – it cannot be prior to the date you are entering the delegation.

5) Enter an End Date if needed.

6) In the Delegate field enter the name of a person (or more than one person) to whom you will delegate.

7) In the Start on my Behalf field, choose the business processes from the menu that the Delegate will initiate on your behalf.
Note: As with many Workday menus you are able to make more than one choice from the menu before closing it. The choices will appear in a list below the field you are searching for.

8) After populating the **Start on My Behalf** field you will receive an Alert.

9) Click **Submit**.

Create a delegation to do Inbox tasks on your behalf: Enables you to delegate your entire Inbox or specific business processes from your Inbox, for a specified period of time for other user(s) to complete tasks and temporarily act on behalf of you.

1) Select the **Related Actions and Preview** icon next to your name

2) In the Available Actions menu on the Worker Preview pane, select **Business Process > My Delegations**.

3) On the **My Delegations** page, click the **Manage Delegations** button to access the Manage Delegation page.

4) Enter a **Begin Date** – it cannot be prior to the date you are entering the delegation.

5) Enter an **End Date** if needed.

6) In the **Delegate** field enter the name of a person (or more than one person) to whom you will delegate.

7) In the **Do Inbox tasks on My Behalf** field choose one of the options if you want to allow your delegate(s) the ability to see and act on any tasks that appear in your Inbox.

You can allow your delegate(s) to see all business processes that come to your inbox or a specific set of BPs.

8) We recommend, checking the **Retain Access to Delegated Tasks in Inbox** box to retain the ability to complete your tasks.

9) Click **Submit**.
You may delegate a task: Enables a user who has a task waiting in their Inbox the ability to delegate the task to another user, allowing that user to perform individual actions on his or her behalf.

1) Find the approval in your Inbox.
2) Select the down arrow on the **Review** button.
3) From the drop-down select **Delegate Task**.
4) Enter the name of the **Proposed Delegate**.
5) In the Comments section, enter the reason for the delegation.
6) Click **Submit**.

To cancel or modify the delegation:

Once you submit the delegation you can cancel or modify it. The way you proceed depends on whether your manager has already approved your delegation or not.

**If the delegation is Approved:**

For approved delegations, you can modify the dates, tasks, and other information, and you can add new delegates or remove delegates.

1) Select the **Related Actions and Preview** icon next to your name
2) In the **Available Actions** menu highlight **Business Process>My Delegations**.
3) On the **My Delegations** page, click the **Manage Delegations** button.
4) Modify the delegation as you like.
5) Click **Submit**

If you need to completely delete the delegation, submit a ticket via the Workday Helpdesk at [hrpayrollsupport@cornell.edu](mailto:hrpayrollsupport@cornell.edu).

**If the delegation is Not Approved:**

1) To modify the delegation request, click the **Related Actions and Preview** icon icon near your name.
2) Highlight **Business Process**, and click **My Delegations**.
3) Click the **Delegation History** tab, and you will see the delegation that you started, it will still be in progress.
4) To cancel a delegation request: Click the Related Actions and Preview icon off the Delegation Action that is “In Progress”.

5) Highlight the Business Process option and click Cancel.

6) Enter a Comment.

7) Click Submit.

**Note:** You can also access this via the Archive tab of your Inbox by clicking on the Delegation event, select the Related Actions and Preview icon to the right of the delegation request, highlight the Business Process option, and click Cancel.

Delegation: Acting on Behalf of Another User:

Workday makes it easy for you to manage and perform delegated tasks. The action of Switch Account is taken to act on behalf of another user.

If you currently have delegations assigned to you, Workday displays the Switch Account icon next to your name:

1) To switch to the account for which delegations have been assigned to you, click Switch Account.

2) Click on the account of the user for which you have been delegated to act on behalf of.

**Note:** Switching Accounts brings up a new Delegation Dashboard and another worklet called Delegated Actions. From this dashboard, you can initiate business processes that have been delegated to you by the user on whose behalf you are acting.

3) User can initiate new tasks by clicking on the hyperlink within Reports and Tasks.

4) To switch back to your personal Workday account, click the Switch Account icon again and click your own name.
Delegation: To View Entire Delegation Inbox:

In order to View Entire Delegation Inbox, users can do the following steps:

1) From your Profile Menu, click on Notifications.

2) Click on the notification called “Workday Delegated Tasks Update.”

3) Click on View Entire Delegation Inbox and proceed to any of the following tabs:

- **Tasks** – displays the business process awaiting your action as well as who delegated, the Subject, Due Date and Date Received, Skip or Reassign (if possible).
- **Process Status** – displays the business process status of the events in which you have acted upon.
- **Notifications** – displays notifications as well as allows you to view and maintain notifications.
- **Delegation Settings** – displays the current delegations and corresponding information.