LAST UPDATED DATE: 3/11/25

Manage Delegations

Overview

Delegation *temporarily* reassigns your inbox tasks to another user. A typical example of a delegation scenario is an approver role before they leave for a vacation (such as approving timesheets).

Setting up a delegate enables that user to perform individual actions on your behalf. You can delegate to a superior, a peer, or a subordinate. Consider who has the knowledge to complete the Workday actions. When the delegation period ends, any incomplete delegated tasks revert to the original owner.

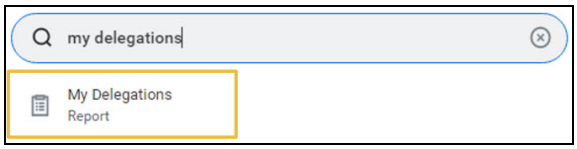
This job aid will first cover setting up a delegation. If you are assigned as a delegate and want to skip to the steps that cover how you access the worker's tasks, skip to the Switch Accounts for Delegates section on page 5.

Note: *Not all tasks are available for delegation.*

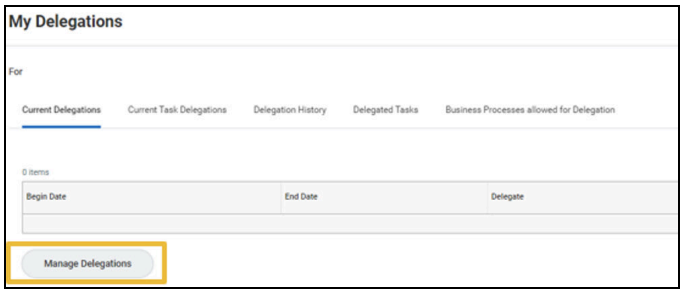
Manage Delegations

Security Role(s): HR Administrator, HR Partner, Manager, Management Chain

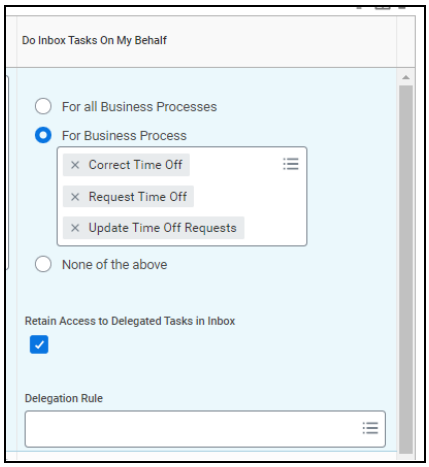
1. Enter **My Delegations** in the search bar, and select the report, **My Delegations**.



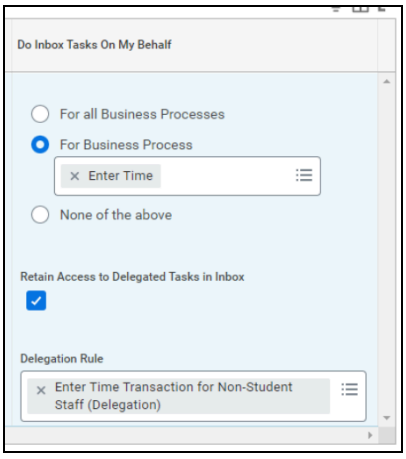
2. From the My Delegations report, select **Manage Delegations.**



3. Enter the details for the delegation. Complete the following steps for a delegation related to **time off requests** or **timecard approvals**. Skip these steps if not applicable.
    a. **Begin Date:** Select the date the delegation should go into effect. This can be future dated. A begin date is required.
    b. **End Date:** Select the date the delegation reverts to the original owner. An end date is required.
    c. **Delegate:** Select **t**he person you select to complete the tasks on your behalf.
        - This is a person, not a position as in other areas of Workday.
        - If you are unable to find the person you'd like to delegate to in the dropdown, try typing in their name.
    d. **Start On My Behalf:** In addition to review and approvals, this allows you to set a delegate to initiate a process. This is not used very often and is not a required field.
    e. **Do Inbox Tasks On My Behalf:** In this box, you can select For all Business Processes, or choose the For Business Processes option *(select specific processes associated with this delegate)*. The second option is the most common choice for individuals with multiple roles in Workday.
        - To delegate <u>time off requests</u> select **Request Time Off, Correct Time Off and Update Time off Requests** in the **For Business Process** field.



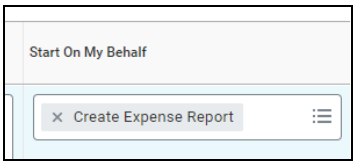
        - To delegate <u>timecard approvals</u> select **Enter Time** in the **For Business Process** field. In the **Delegation Rule** field you can select non-student or student transactions.



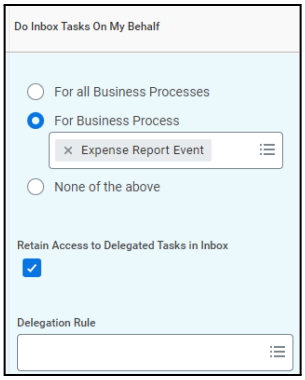
- You can also select the **Retain Access to Delegated Tasks in Inbox** checkbox. This will allow you to get notifications and access the tasks from your own inbox as usual.



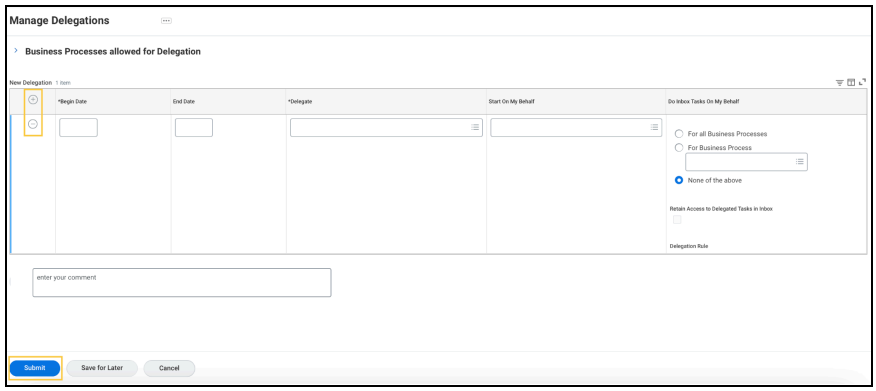
4. Enter the details for the delegation. Complete the following steps for a a delegation related to **Create Expense Report** or **Expense Report Approval:**
    a. **Begin Date:** Select the date the delegation should go into effect. This can be future dated. A begin date is required.
    b. **End Date:** Select the date the delegation reverts to the original owner. An end date is required.
    c. **Delegate:** Select the person you select to complete the tasks on your behalf.
        - This is a person, not a position as in other areas of Workday.
        - If you are unable to find the person you'd like to delegate to in the dropdown, try typing in their name.
    d. **Start On My Behalf:** If you'd like to delegate that a person create an Expense Report (for personal reimbursement or for SNC Expense Card reconciliation) on your behalf, select: **Create Expense Report**. Otherwise, leave blank.



    e. **Do Inbox Tasks On My Behalf:** If you'd like to delegate that a person approve expense reports on your behalf, then in the **For Business Process** menu, select: Expense Report Event. Otherwise, select **None of the above.**
    f. **Retain Access to the Delegated Tasks in Inbox:** Select the checkbox. This will allow you to get notifications and access the tasks from your own inbox as usual.
    g. **Delegation Rule**: Leave this field blank.



4. To add additional delegations, add a row to the delegations grid by selecting the **+ icon**, and repeat the above steps as applicable.
5. To stop a delegation or remove a delegation, remove the row associated with the delegation from the grid using the **- icon**.

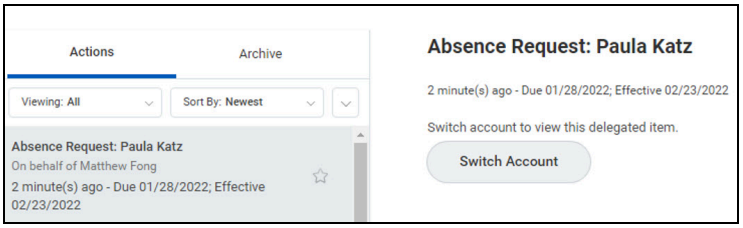


6. When you finish setting up your delegations, select **Submit**.

Switch Accounts for Delegated Tasks

Security Role(s): HR Administrator, HR Partner, Manager, Management Chain, Top Level Managers Approver

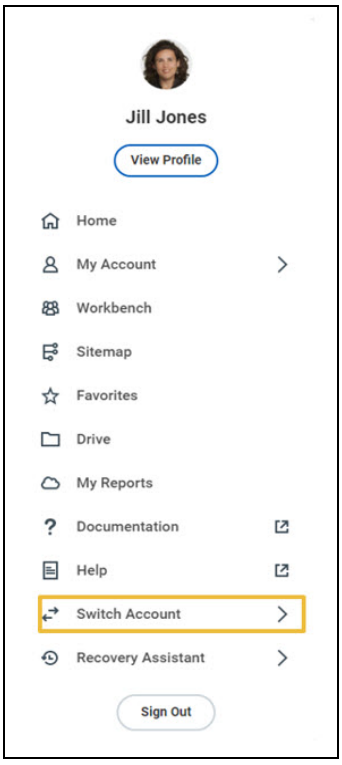
1. Delegated Inbox tasks are displayed in your Inbox (for your Workday account). The action item titles display On Behalf of, followed by the name of the delegator, to indicate that they are delegated tasks. However, you cannot view the details or complete the tasks until you switch accounts. In the Inbox item pictured below, we would select **Switch Account** to begin actioning on the task.



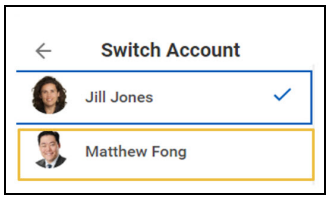
2. In addition to the button in the Inbox, Workday displays the Switch Account option in your Profile Menu. Click your **Profile Icon**.



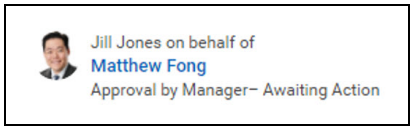
3. This will open the Profile Menu. Select **Switch Account**.



4. You are presented with a list of users who have delegated Inbox tasks or Initiating Actions to you. Select the user for whom you want to act as a delegate.



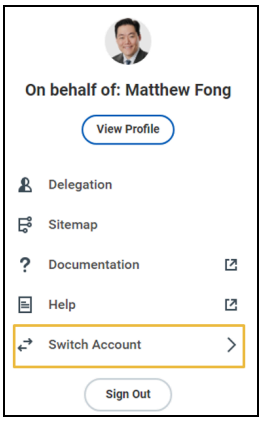
5. Once you switch accounts, Workday displays On Behalf of, followed by the name and photo of the delegator. Select the **Inbox** to see tasks delegated to you by the user on whose behalf you are acting. You can act now just as you would from your own inbox. In the process, it will show that this was acted "on behalf of."



6. To switch back to your own Workday account, select the Profile Icon.



7. **Switch Account** again.



8. Next select your own name.

