

Delegations: My Delegations

PURPOSE

The purpose of this job aid is to assist staff with delegating the initiation of all or specific business processes. Example: A manager can give an administrative assistant the ability to initiate a hire on their behalf, or a staff member or manager can delegate all business processes to someone in their Workday supervisory organization, when they know they will be out of the office for an extended period of time.

Delegation does not remove responsibility (ownership) for the task from the delegator to whom it was initially assigned and, when the delegation period ends, any incomplete delegated tasks revert to the original owner.

Note: In the event that a delegated task is sent back to the delegatee to modify, the delegator may or may not see the task in his/her inbox. To check status, delegator can click on the **Archive** tab and view status of the task.

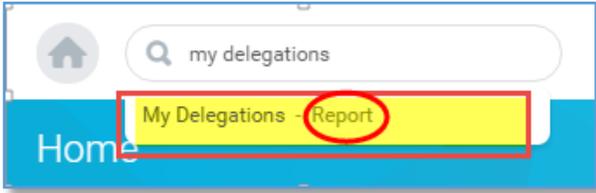
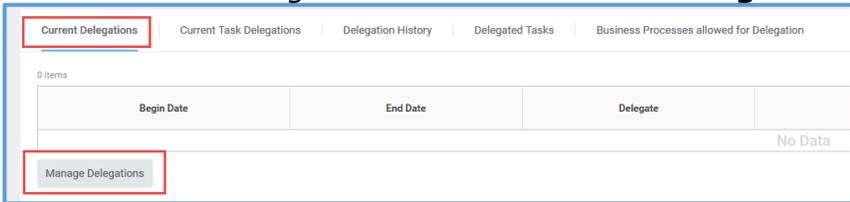
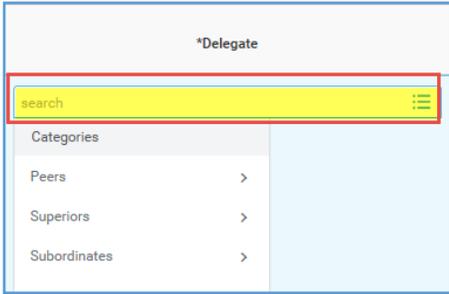
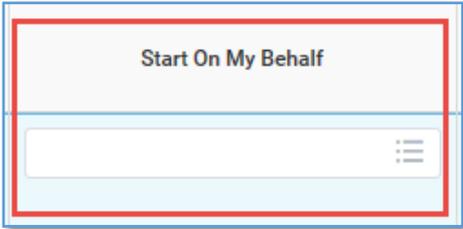
TASKS IN THIS JOB AID

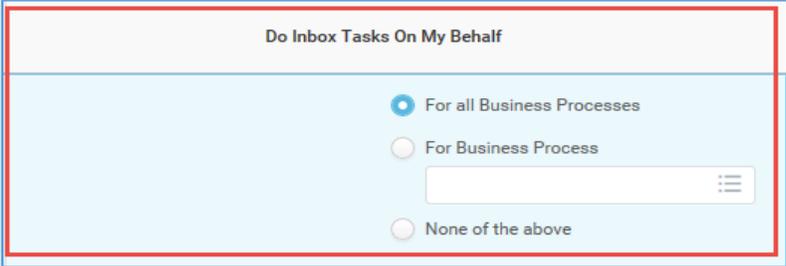
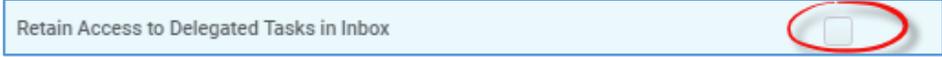
[Manage Delegations](#)

[Stop Current Delegations](#)

[Reports Available](#)

PROCEDURE

Manage Delegations	
Step 1	Login to Workday
Step 2	Type My Delegations in the search field and select My Delegations - Report 
Step 3	Select <i>Current Delegations</i> tab and click on Manage Delegations 
Note	You may need to use ⊕ icon to add new delegations
Step 4	Choose Begin Date
Step 5	Choose End Date (Note: The field End Date is required and must have a value)
Step 6	Type or choose delegate's name from categories in the Delegate field 
Note	Delegator can <u>only</u> assign tasks to his/her Peers, Superiors or Subordinates within their supervisory organization.
Step 7	In Start On My Behalf field choose the business processes (tasks) you would like your delegate to <i>start</i> on your behalf. 

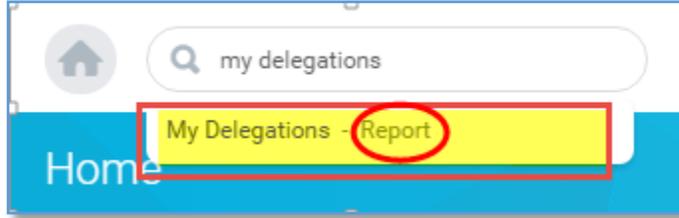
Note	Start on My Behalf gives delegate the ability to create tasks. You can choose all of the business processes, or only certain ones.								
Step 8	<p>In Do Inbox Tasks On My Behalf, choose one of the following:</p> <table border="1" data-bbox="402 226 1398 724"> <thead> <tr> <th data-bbox="402 226 899 262">If selected</th> <th data-bbox="899 226 1398 262">Result</th> </tr> </thead> <tbody> <tr> <td data-bbox="402 262 899 367">For all Business Processes</td> <td data-bbox="899 262 1398 367">To approve ALL business processes (tasks) on my behalf.</td> </tr> <tr> <td data-bbox="402 367 899 514">For Business Process</td> <td data-bbox="899 367 1398 514">To approve only specific business processes (tasks) on my behalf and then select which business processes.</td> </tr> <tr> <td data-bbox="402 514 899 724">None of the above</td> <td data-bbox="899 514 1398 724">Delegate will <i>not</i> have access to approve your Workday Inbox; they will only have access to create tasks you chose under Start On My Behalf section.</td> </tr> </tbody> </table> 	If selected	Result	For all Business Processes	To approve ALL business processes (tasks) on my behalf.	For Business Process	To approve only specific business processes (tasks) on my behalf and then select which business processes.	None of the above	Delegate will <i>not</i> have access to approve your Workday Inbox; they will only have access to create tasks you chose under Start On My Behalf section.
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Step 10	<p>Check the Retain Access to Delegated Tasks in Inbox box</p>  <p>Important Note If delegator has chosen any of the inbox tasks for their delegate to do on their behalf, it is incredibly important to <i>check</i> the Retain Access to Delegated Tasks in Inbox box. <i>If delegator does not check this box, all the tasks that need to be approved will go to delegate's inbox <u>only</u> and if the delegate leaves the college then delegator would not have access to get those tasks back.</i></p>								
Step 11	Click Submit								
Next Step	Manager approval								



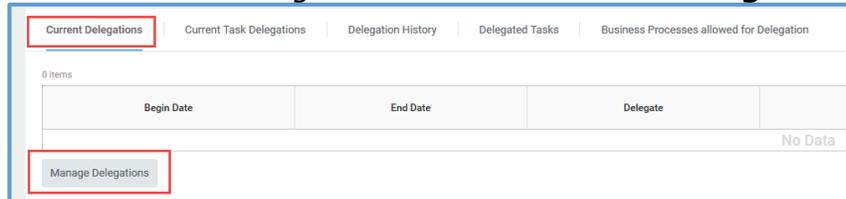
Stop Current Delegations

Your current delegations will stop on the **End Date** that you selected when you initiated the delegation process. To **Stop** delegations before the **End Date**, follow steps listed below

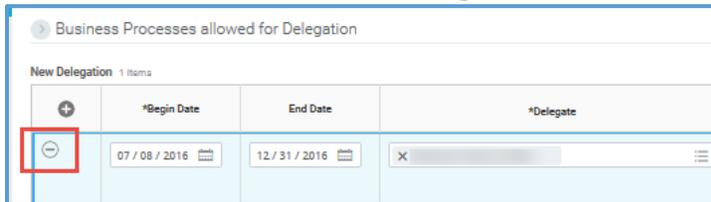
Step 1 Type **My Delegations** in the search field and select **My Delegations - Report**



Step 2 Select *Current Delegations* tab and click on **Manage Delegations**



Step 3 Click the icon to remove delegations



Step 4 Click **Submit**

Next Step Manager approval

Report

Type **My Delegations** in the search field and select **My Delegations – Report**. You may use this report to view completed tasks from the delegating user's point of view:



Item	Description
Current Delegations	Shows the business process delegations that you have defined for your Inbox tasks or that the Business Process Administrator has defined for you. Delegations are only shown as long as they are active. They are removed as soon as the End Date has passed or the delegation has explicitly been stopped.
Current Task Delegations	Shows all tasks that you have delegated using the Delegate Task task and that have not yet been completed by the delegate.
Delegation History	Shows all delegation requests that you or the Business Process Administrator initiated. This tab contains the same delegation requests as the Current Delegations tab, except that here the requests are not removed once they have expired or been stopped.
Delegated Tasks	Shows all tasks that have been completed by a delegate on your behalf.
Business Processes allowed for Delegation	Lists all the business processes that can be delegated.