Delegations

Managers: Use this job aid to delegate tasks and workflow.

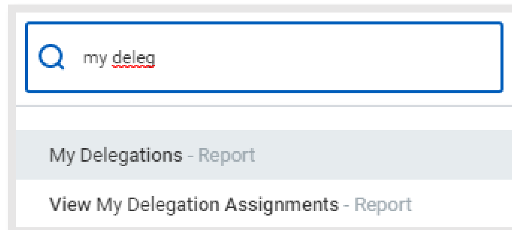
Getting started:

Delegations can be set up for a peer on your team OR a superior in your management chain. If a delegation is needed outside of that scope, contact your HR Business Partner to discuss options. There is an enterprise Delegation of Authority Policy on Workday Headquarters.

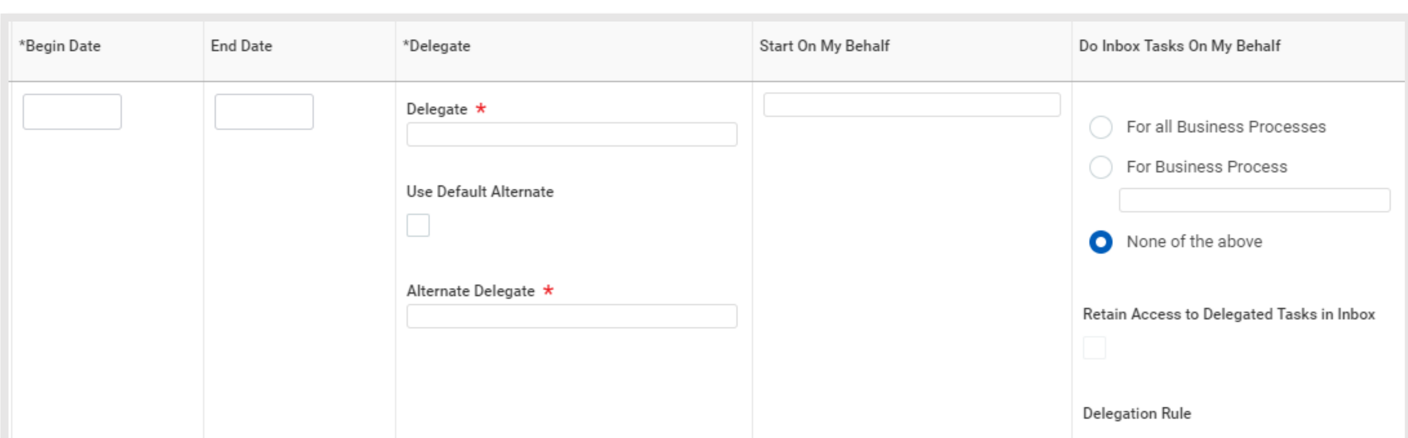
→ When you delegate the creation of an item, you give the assignee access to all of your previously created items of that type. *Please select your assignee carefully, with consideration of confidential information about your staff.* It is important to identify *who* will approve time tracking and time off requests, *who* will manage your team's performance reviews, and *who* will take care of job changes.

Enter the delegation details:

1. In the Workday search bar, start typing "my delegations". Workday's predictive text functionality will show a list of results, click on **My Delegations** (report).
2. On the next page, click on **Manage Delegations**



3. Enter a **Begin & End Date**. Delegations cannot be added retroactively. The End Date can be changed later by returning to the Manage Delegations task.
4. In the "Delegate" column, use the prompt to search for a **Peer or Superior**. Workday will prevent the delegate from approving workflow about themselves and instead routes it to the assignee's manager, known as an "Alternate Approver" in the system.
5. The **Alternate Delegate** field will auto-fill with the manager of the assignee. If it does not, check the "Use Default Alternate" box.
6. In the "Start on My Behalf" column, use the prompt to search for tasks that you want the assignee to start on your behalf.
7. In the "Do Inbox Tasks on My Behalf" column, select an option that will allow the assignee to complete your Inbox tasks.
8. **Retain Access to Delegated Tasks in Inbox:** Check this box if you want to keep a copy of the task in your inbox, otherwise, leave it unchecked if this is not needed.
9. **Delegation Rule:** Do not enter anything in this field
10. Review your entries and click on Submit to finalize the request.



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Delegation reports:

In the Workday search bar, type in **Delegation** and hit Enter. A full list of reports will show in the search results:

- **Delegation History:** Shows the history of delegations for an individual worker
- **Current Delegations:** Shows delegations that are actively in place now for an entire organization
- **View My Delegation Assignments:** Shows the details of your delegations in place now

Instructions for the delegate:

1. Tasks that require your approval will show up in your Workday inbox.
2. Click on **Switch Account** and then click on OK to confirm that you want to continue
3. On the "Delegation Dashboard", click on the Inbox tray icon at the top right to view the task details and approve as needed