DELEGATION

CREATE A DELEGATION TO ALLOW A CO-WORKER TO ACT ON YOUR BEHALF

1. In your Workday Inbox, click the More button and select My Delegations.

2. On the My Delegations page, click the Manage Delegations to open the Manage Delegation page.

3. Enter a Begin Date – it cannot be prior to the current date.

4. Enter an End Date – it can be years out (only recommended for “on-going” timesheet approvers).

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

6. In the Do Inbox Tasks On My Behalf section:
   6a. Select the For Business Processes radio button and click on the Search Box and Enter Request Time Off and Enter Time

This will allow your delegate(s) the ability to see and act on approving time for both Salary and Hourly employees.

Keep in Mind:
- Managers can use delegation to allow additional users to act on their behalf for the approval of time worked and time off
- If your manager is not available to approve your timesheet you can ask the next level manager to approve as well.
- Please use this process to delegate to a peer or superior when you go on an extended vacation (when timesheets are due), leave of absence, or for a “on-going” timesheet approver.
7. We recommend that you check the Retain Access to Delegated Tasks in Inbox box to retain the ability to complete your tasks.

8. Click Submit.

9. You and the delegatee will receive a Notification indicating you have created a Delegation.

CANCEL OR MODIFY THE DELEGATION

Once you submit the delegation, you can cancel or modify it. You can modify the dates, tasks, and other information, and you can add new delegates or remove delegates.

1. In your Workday Inbox, click the More button and select My Delegations.
2. On the My Delegations page, click the Manage Delegations button.
3. Modify the delegation as you like. Click the Remove Row (minus) button to delete the delegation.
4. Click Submit.

ACTING IN BEHALF OF ANOTHER USER – HOW DO I GET TO THE DELEGATED INBOX?

You are assigned to be a delegate by a co-worker to perform approval tasks on their behalf. Follow the instructions below to act on their behalf:

1. On your profile menu (Cloud on upper right corner), click Switch Account to switch to the delegated account.
2. Click the user for whom you are a delegate.
3. Switching accounts brings up the delegation dashboard with delegated actions. From here, you can approve time off entries that have been delegated to you by your peer or superior.

The delegation dashboard will disappear after you select it the first time.
TO VIEW DELEGATED INBOX:

After switching to the delegated Inbox, click the Inbox icon and you can see your co-worker’s delegated Inbox

HOW DO I SWITCH BACK TO MY ACCOUNT?

1. To switch to your personal Workday account, click the Switch Account and click your own name.