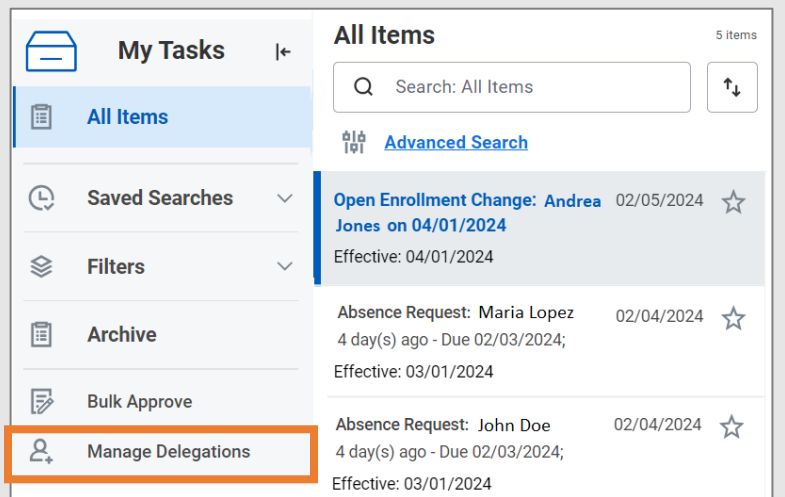**Introduction:** Actions and tasks are routed to you through a business process and appear in your My Tasks inbox for review and approval. Sometimes these tasks are better completed by someone else, or you may be out of office for a period of time, and that's where delegations come in.

Delegation temporarily reassigns your tasks to another user, enabling that user to perform individual actions on your behalf. The delegate you select is restricted to the tasks you delegate to them. The delegate can only take actions within the limits of your own access privileges.
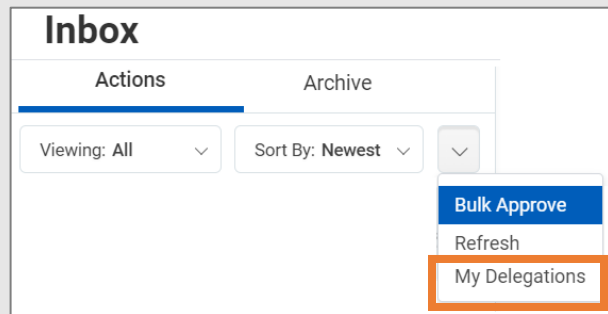
You can allow your delegate to initiate an action on your behalf. Or you can allow your delegate to approve inbox items on your behalf. Or both.

Create a Delegation

1. To start, go into your Workday My Tasks inbox. Select the last menu choice, **Manage Delegations**.
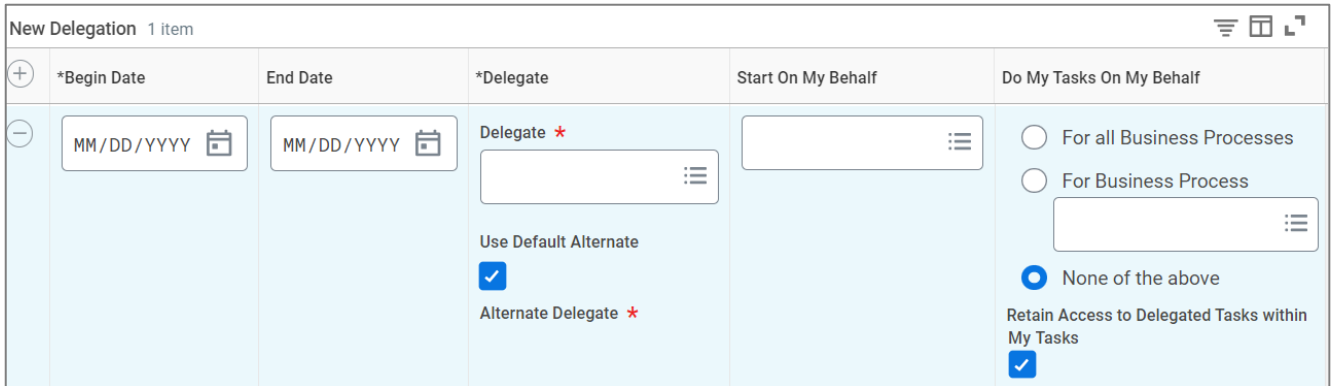
   (**Note:** *Until March, the Workday Inbox will still be in effect. Access delegations in February by going to your Workday Inbox, clicking on the down arrow to the right of the Actions and Archive menus, and selecting My Delegations. The process will be the same from this point forward.*)

2. Below is a guide to each tab on the resulting screen.

Current Delegations	Current Task Delegations	Delegation History	Delegated Tasks	Business Processes allowed for Delegation
Any active delegations and delegates will be listed here	A list of all delegated tasks that have not yet been completed	This is a log of delegations, both active and inactive, for your profile	Displays all tasks that a delegate has completed on your behalf	An exhaustive list of all business processes that may be delegated

| 3. | To create a delegation, click the ⬭ Manage Delegations button at the bottom of My Delegations tab. |

| 4. | |

New Delegation 1 item					☰ ⊞ ⌐
	*Begin Date	End Date	*Delegate	Start On My Behalf	Do My Tasks On My Behalf
⊖	MM/DD/YYYY 📅	MM/DD/YYYY 📅	Delegate * ☰ Use Default Alternate ☑ Alternate Delegate *	☰	○ For all Business Processes ○ For Business Process ☰ 🔵 None of the above Retain Access to Delegated Tasks within My Tasks ☑

Fill out the resulting delegation form, including:

- The **date range** in which it should take place (it can also be left open-ended for ongoing delegations).

- **Delegate** - Type in the name of the person you are delegating to and press "enter" to select them from the drop-down menu. Note: The Default Alternate delegate is the manager of the delegate you have selected, which you may override by unchecking the Use Default Alternate box and putting a different name in the Alternate Delegate field.

- **Start on My Behalf** - If you would like the delegate to be able to initiate business processes on your behalf, like creating a job requisition (for a recruitment), you will select them from the drop-down menu that displays after clicking in the field. This may not always apply and this field can be skipped.

- **Do My Tasks On My Behalf** – The most commonly used area for delegations, this allows you to delegate tasks and action items assigned to you so that someone else may complete them on your behalf. Examples would include approving time clock entry and approving absences. You may choose to delegate all business processes or select specific business processes from a list that displays when clicking in the For Business Process field.

- **Retain Access to Delegated Tasks** – Checking this box will allow both the delegate and you will have the ability to view and complete any action items or tasks assigned to you. If you do not check this box, you will not have access to your My Task items during the specified date range.

| 5. | Once the form is completed, click the **Submit** button and the delegation request will be routed to your direct supervisor for approval. You will receive a notification once the delegation has been approved. |

End a Delegation

1. You may end the delegation at any time, even before the date range specified. Go to your My Tasks inbox and select the last menu choice, **Manage Delegations**.

   Click the minus button to the left of the delegation and then **Submit**. The delegation will be removed.

   > **Business Processes allowed for Delegation**
   > New Delegation 1 item
   >
   > | ⊕ | *Begin Date | End Date | *Delegate |
   > |---|---|---|---|
   > | ⊖ | 02/06/2024 | 02/06/2024 | Delegate * |
   > | | | | ✕ Andrea Jones ⋯ ☰ |

Managing Delegated Tasks

1. When you have been delegated tasks by someone else, the new tasks and action items will be listed in My Tasks along with your own. The tasks delegated to you will be labeled with "On behalf of" as shown in the example to the right.

   Absence Request: **Alex Jones**   02/02/2024 ☆
   On behalf of Jane Wu
   Due: 02/04/2024 | Effective: 02/16/2024

2. Upon clicking on a delegated task, a prompt to switch accounts will appear in the task description pane. Click **Switch Account** and then **OK**.

   Absence Request: Alex Jones
   ☆ 📊 PDF ⚙ ⤢
   Created: 02/02/2024 | Due: 02/04/2024 | Effective: 02/16/2024
   Switch account to view this delegated item.
   [Switch Account]

   Switch Account
   You are about to act as Jane Wu. Do you want to continue?
   [OK]   [Cancel]

3. Click on the **My Tasks** icon in the upper right corner and complete delegated tasks. The My Tasks folder will function in the same way as your own. It will be noted within the system that any approvals made were done by you on behalf of the original assignee.
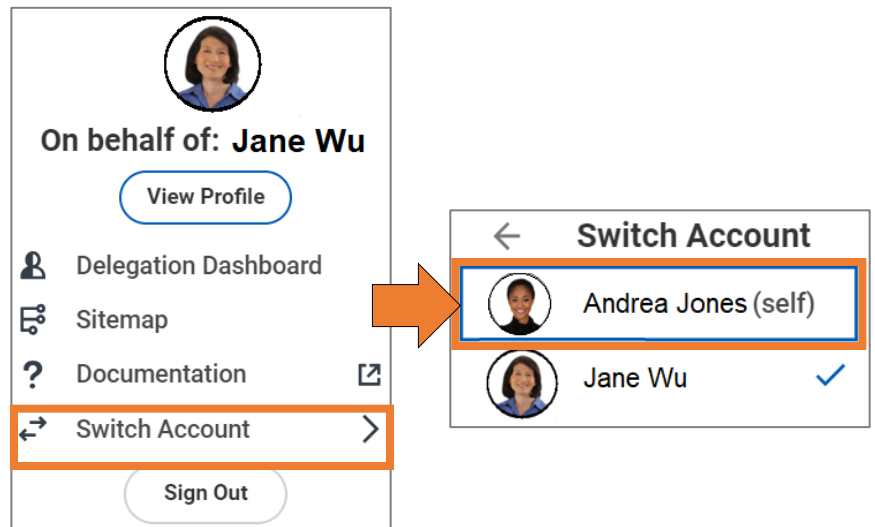
   WILLAMETTE UNIVERSITY   🔍 Search   📥³
   Delegation Dashboard
   Delegated Actions
   No data found

WILLAMETTE ⊕ UNIVERSITY

4.	To navigate back to your account, click on your profile picture in the upper right-hand corner. Click on **Switch Account** from the resulting menu and then click on your name.	

On behalf of: **Jane Wu**

[View Profile]

👤 Delegation Dashboard

🗺 Sitemap

? Documentation ↗

⇄ Switch Account 〉

[Sign Out]

← **Switch Account**

Andrea Jones (self)

Jane Wu ✓

Establishing a Back-Up for Time Approvals

If you are a supervisor, it's a good idea to have another supervisor serve as a back-up for timesheet approvals should you find yourself unexpectedly out of the office or on a pre-planned vacation. You may establish a fixed-term delegation (say, for a 2-week vacation) or an open- ended delegation so that your colleague may provide timesheet back-up at any time.

To provide all of the access needed, you'll want to establish your delegation as pictured below.

*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf

Delegate *
✕ Bruce Banner ☰
 	
Use Default Alternate
☑
 	
Alternate Delegate *
	✕ Correct Time Off ☰
	✕ Enter Time for Worker (delegation only)
	✕ Enter Time Off
		○ For all Business Processes
		◉ For Business Process
		  ✕ Correct Time Off ☰
		  ✕ Enter Time
		  ✕ Request Time Off