Delegation

1. You may wish to delegate various business processes to others such as an Office Manager, or other responsible individual. You may opt to retain access to new processes in your Workday inbox along with the inbox of your Delegate. This choice is detailed in Step 12.

2. To begin, first go to your Workday Inbox by clicking on your picture and selecting Inbox.

3. From your Inbox click on the outer-most down arrow.
Delegation

4. And then Click My Delegations

5. This will bring up the Delegations Page

6. Click on Manage Delegations
Delegation

7. Workday will prompt you for the Begin and End Date for the Delegate’s service. The Begin date will typically be today’s date and the End Date may be any realistic date in the future, such as one year from today. Both dates are **required** and you may cancel the delegation at any time.
8. Enter the Delegate’s first and last name and press Enter.

9. In the field labeled ‘Start on My Behalf’, type the name of the process you would like to delegate and then press enter. If you are not sure of the name you can click on the prompt and search for it.
Delegation

10. Workday will display an orange alert with information about the delegation process.

11. In the panel labeled ‘Do Inbox Tasks On My behalf’ you can choose either “For all Business Processes” or “For Business Process”. The second one allows you to search for and delegate a specific business process rather than delegating all business processes to someone else.
Now you have a choice to make. If you would like to retain access to your business processes when they post to the Inbox, click the check box. This option will allow either you or your Delegate to, in this example, create the expense report. The charge will appear in your Inbox as well as the Inbox of your Delegate, until one person acts upon it.
13. Click the green Submit button on the bottom left. Workday will send the delegation request to your Supervisor for approval.
Delegation