

**Delegation** is the temporary assignment of another person to act on your behalf to carry out specific activities. Workday allows you to Delegate your Workday Inbox or specific tasks from your Inbox (such as approvals), or the ability to initiate actions for business processes. **A Delegation should be made on a temporary basis to allow for a manager's inbox to be handled by someone else while they are on vacation, out ill, or on a leave of absence.** All requests for Delegation will go through an approval process.



Note: **Delegations** should only be used when you will be unavailable to complete time-sensitive tasks. Inboxes contain HR- related tasks that may contain salary or other personal information. Delegating your entire Inbox should be done only when you will be unavailable for an extended period of time, and the Delegate should be a person (peer or supervisor) who already has access to the same information you do.



This job aid will guide you through:

- Setting Up Delegation
- View Delegates
- Acting as a Delegate

## SET UP DELEGATIONS

1. From the **Home Page**, enter **My Delegations** in the Search bar and select the **My Delegations Report** from the search results.
2. Select **Manage Delegations**.






### My Delegations



For [George Clooney](#)

[Current Delegations](#) [Current Task Delegations](#) [Delegation History](#) [Delegated Tasks](#) [Business Processes allowed for Delegation](#)

Turn on the new tables view ☐

0 items 

Begin Date	End Date	Delegate	Retain Access to Delegated Tasks in Inbox
No Data			

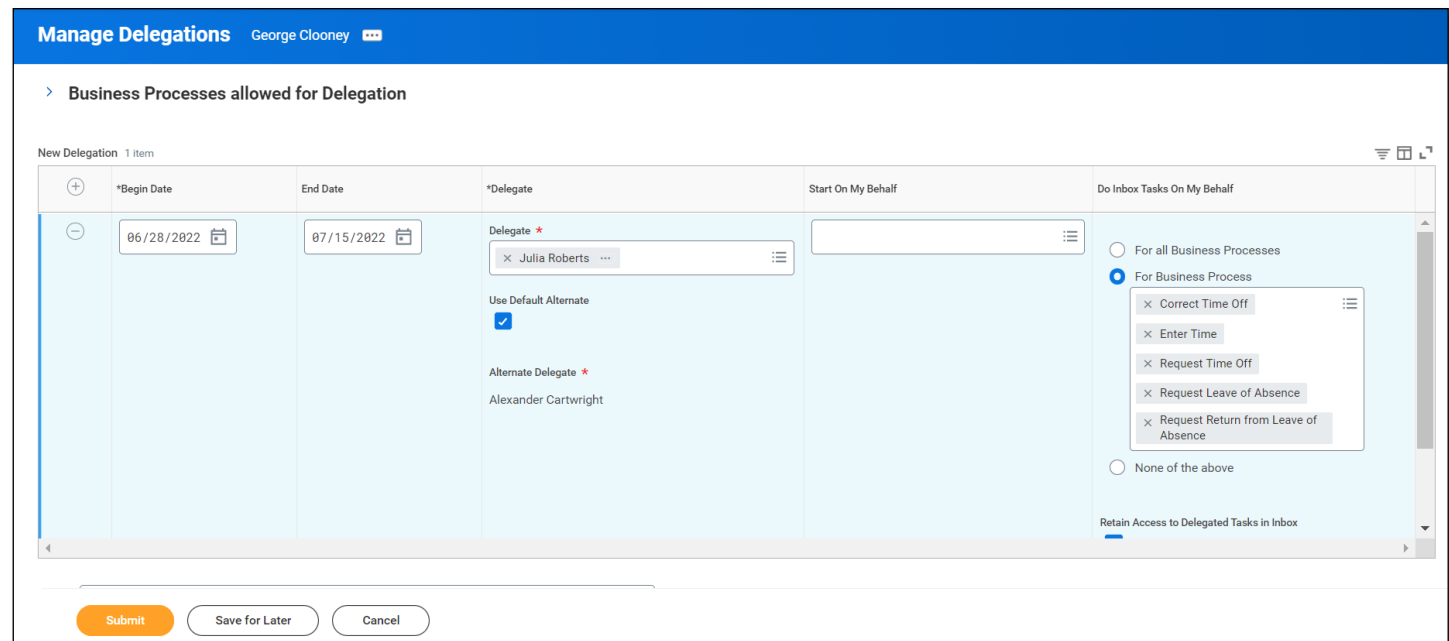
Manage Delegations

3. Enter a **Begin Date**.
4. Enter an **End Date** e.g. an anticipated/planned date range you will be out of the office.
5. Enter the name of the **Delegate** - person performing the tasks on your behalf.

*Skip the **Start on My Behalf** section. This is if you want to allow the delegate to intiate business processes on your behalf.*

To delegate Inbox tasks:

6. *Optional* - Select **For All Business Processes** to delegate all inbox tasks.
7. Select **For Business Process** to delegate select tasks.
8. Select tasks from drop down menu. *See list on the right.*

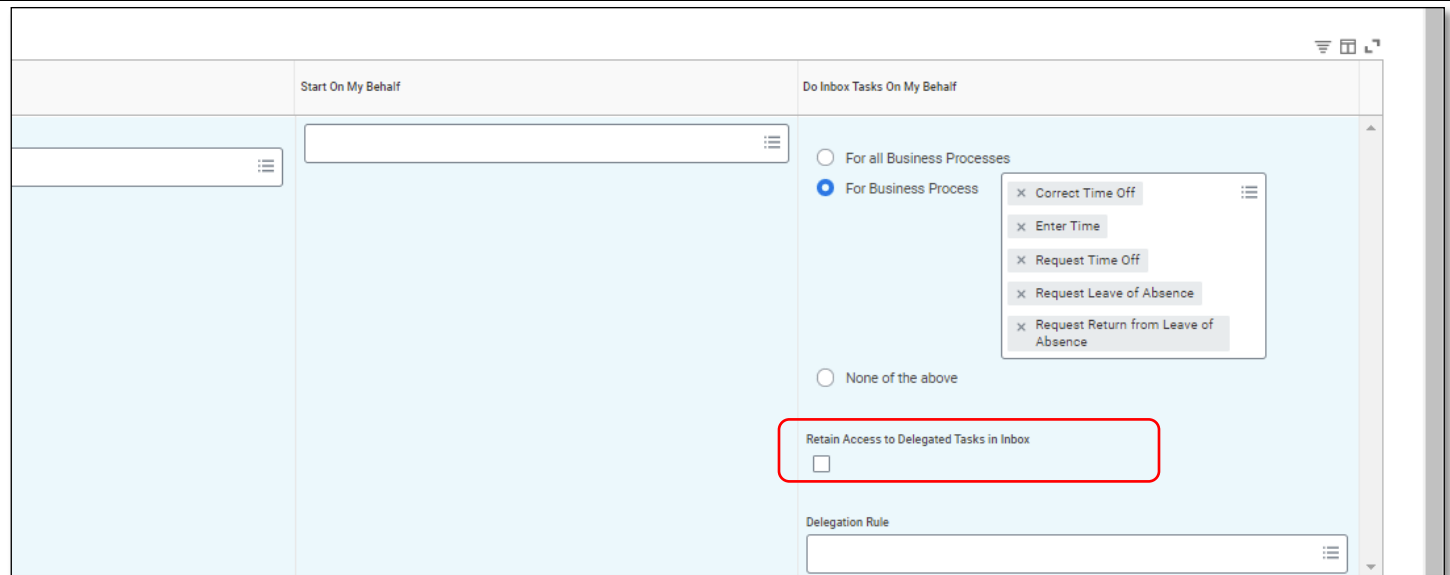


For time and absence approvals, make sure you select the business processes below you like someone to approve on your behalf, while you are away:

- **Correct time off** – any corrections to time off requests that require your approval.
- **Enter time** – timesheets that are submitted by your workers that will require an approval by the deadline for the current payperiod.
- **Request time off** – any time off requests submitted by your workers that require your approval.
- **Request leave of absence** – in the event one of your workers will require to be away on a leave of absence and requires your approval
- **Request return from leave of absence** – in the event you have a worker that is on leave of absence and is returning while you are away

9. Check the **Retain Access to Delegated Tasks in Inbox** to allow you to manage Inbox items during the delegation period, should you choose to. Items will appear in your Inbox as well as that of the Delegate. If the Delegate completes the task, it will move from the Actions tab to Archive tab in both inboxes.

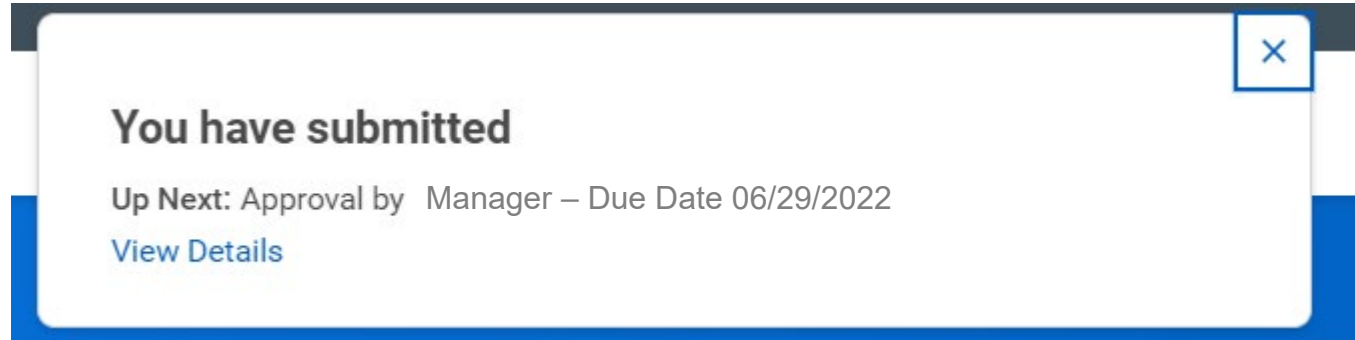
10. Click **Submit**.




**Note:** The request to delegate requires approval by your immediate supervisor or manager

After your request is submitted, it will go to your manager for approval.

If you click view details, you will see the details of your request and who will need to approve.

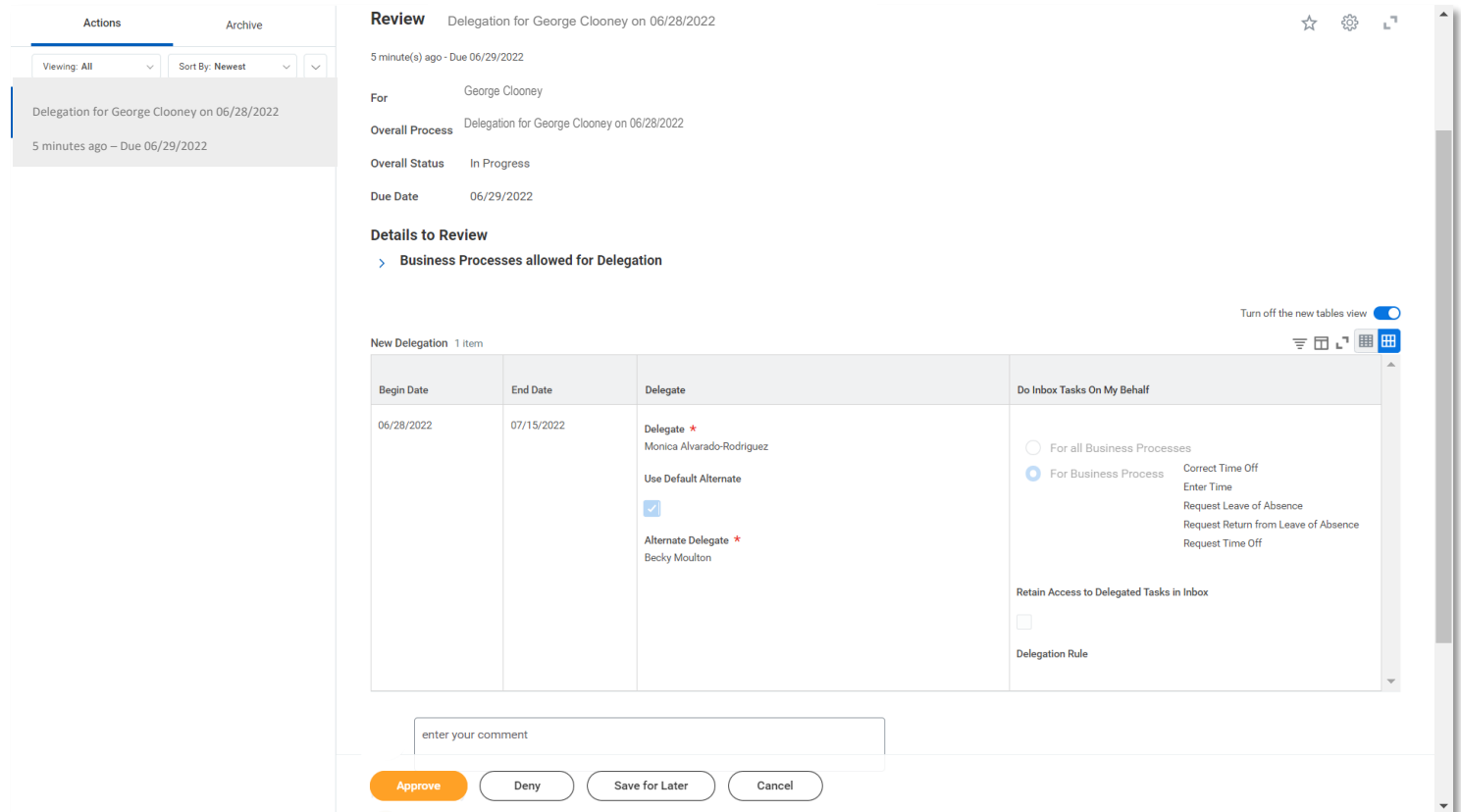


### Approving a Delegation Request:

- Your manager will get the delegation task in their Workday inbox (they will also get an email to their UCF Outlook inbox).
- They will review the request and Approve or Deny.

Please make sure you are communicating with your manager to make sure they have all the details needed from you before you start your absence.

- The request must be approved in order for the delegation to be active.



The screenshot shows the 'Review' page for a delegation request. On the left, there's a sidebar with 'Actions' and 'Archive' tabs. The main content area is titled 'Review Delegation for George Clooney on 06/28/2022'. It shows the request was made 5 minutes ago and is due on 06/29/2022. The 'For' field is 'George Clooney'. The 'Overall Process' is 'Delegation for George Clooney on 06/28/2022'. The 'Overall Status' is 'In Progress'. The 'Due Date' is '06/29/2022'. Below this, there's a section 'Details to Review' with a link to 'Business Processes allowed for Delegation'. A table shows the delegation details: 'Begin Date' (06/28/2022), 'End Date' (07/15/2022), 'Delegate' (Monica Alvarado-Rodriguez), and 'Alternate Delegate' (Becky Moulton). The 'Do Inbox Tasks On My Behalf' section has radio buttons for 'For all Business Processes' and 'For Business Process' (selected). The 'Retain Access to Delegated Tasks in Inbox' checkbox is unchecked. At the bottom, there's a comment field and buttons for 'Approve', 'Deny', 'Save for Later', and 'Cancel'.

Begin Date	End Date	Delegate	Do Inbox Tasks On My Behalf
06/28/2022	07/15/2022	<b>Delegate *</b> Monica Alvarado-Rodriguez  Use Default Alternate <input checked="" type="checkbox"/>  <b>Alternate Delegate *</b> Becky Moulton	<input type="radio"/> For all Business Processes <input checked="" type="radio"/> For Business Process

## VIEW DELEGATIONS

1. From the **Home Page**, enter **My Delegations** in the Search bar and select the **My Delegations Report** from the search results.
2. **Current Delegations** display.
3. **Business Processes Allowed for Delegation** tab: View all allowable tasks for delegation.

For [George Clooney](#)

**Current Delegations**   Current Task Delegations   Delegation History   Delegated Tasks   Business Processes allowed for Delegation

Turn on the new tables view ☐

1 item

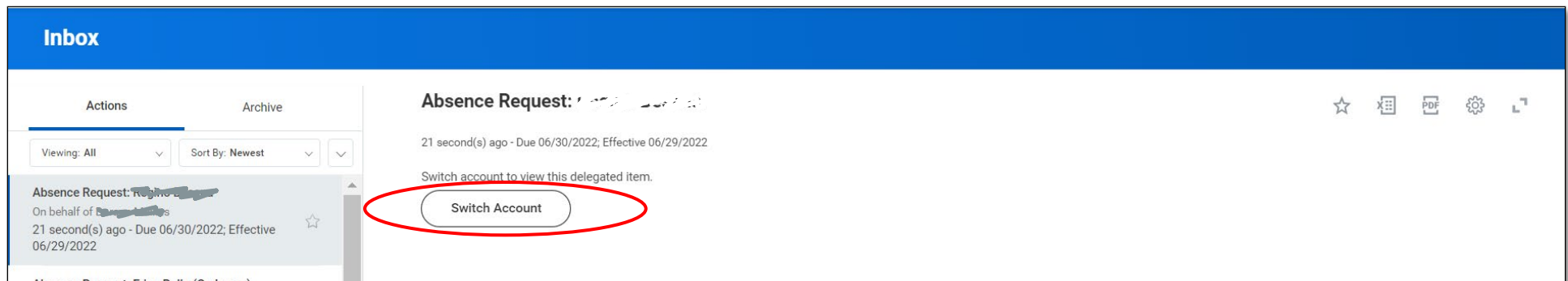
Begin Date	End Date	Delegate	Alternate Delegate	Start On My Behalf	Retain Access to Delegated Tasks in Inbox
04/01/2022	12/31/2022	<a href="#">Julia Roberts</a>	<a href="#">Alexander Cartwright</a>	Create Expense Report	No

Manage Delegations

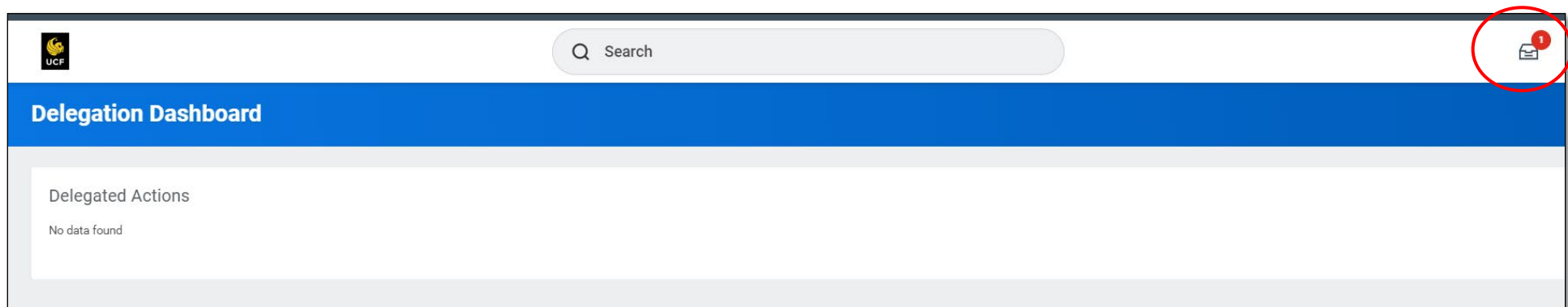
## ACTING AS A DELEGATE

When Workday tasks/processes have been delegated to you, they will appear in your **Inbox Actions** tab, just as they appear to the Delegator.

1. Select the **Inbox** item you wish to act upon.
2. In the open item, click the **Switch Account** button



3. Select **OK**.
4. The **Delegation Dashboard** appears; from here you may access the Delegator's Inbox.



5. Items in the **Inbox** may then be acted upon

**Inbox**

Viewing: All | Sort By: Newest

Absence Request: [Redacted]  
4 minute(s) ago - Due 06/30/2022; Effective 06/29/2022

**Review** Absence Request: [Redacted] \*\*\*

4 minute(s) ago - Due 06/30/2022; Effective 06/29/2022

**For** [Redacted]

**Overall Process** Absence Request: [Redacted]

**Overall Status** In Progress

**Due Date** 06/30/2022

**Details to Review**

**First Day of Time Off** 06/29/2022

**Last Day of Time Off** 07/01/2022

**Total** 24 hours - Annual

Turn off the new tables view ☒

**Request Details** 3 items

Date	Day of the Week	Type	Requested	Unit of Time
06/29/2022	Wednesday	Annual	8	Hours
06/30/2022	Thursday	Annual	8	Hours
07/01/2022	Friday	Annual	8	Hours

**Approve** **Send Back** **Deny** **Cancel**

- Once action has been taken, the item will move to the **Archive** tab in both the Delegate's and Delegator's Inbox.
- To return to your own **Workday** account, click the **Delegator's** profile picture and select **Switch Account**

