



# ***Delegating Tasks With Workday***

*User Guide*

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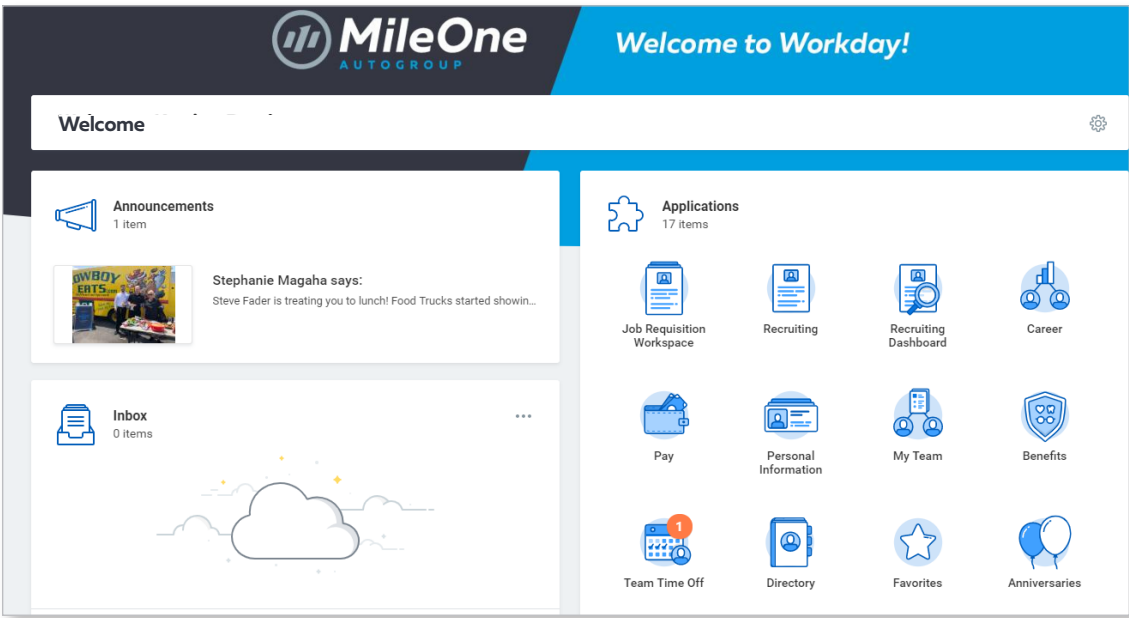
# Delegating Tasks

## With Workday

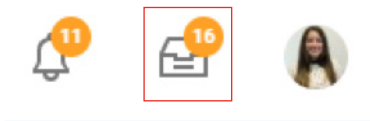
Workday allows you to delegate inbox tasks (e.g., approving timecards or time off requests) to your superior or to a peer when you are going to be out of the office. Delegating temporarily reassigns your inbox task to another user. You are still ultimately responsible for any action taken.

You should use Delegation for any tasks that would need to be addressed while you are out of the office.

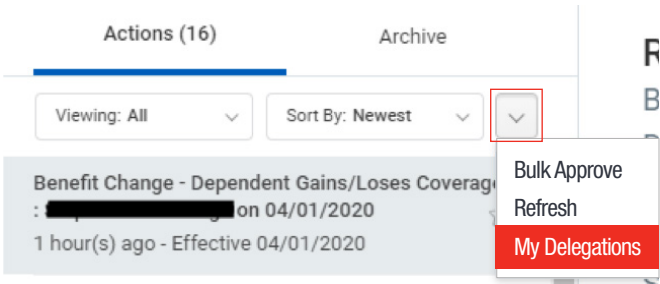
**NOTE:** Everyone you assign delegation rights to can see previously created items.



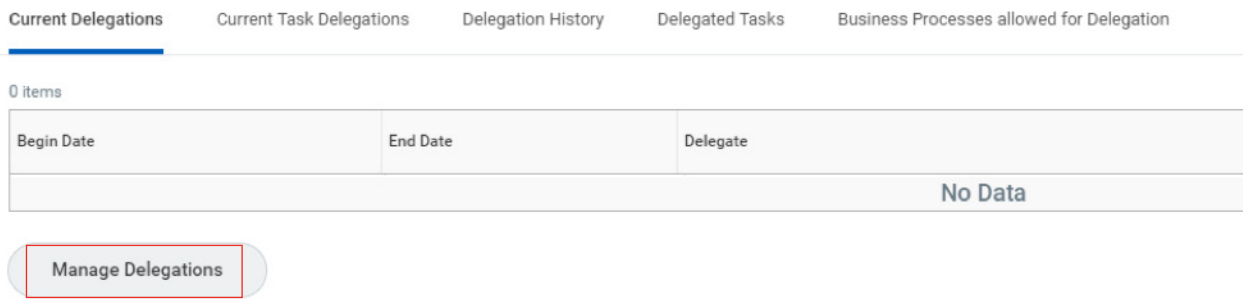
1. Access your inbox from the inbox image in the top right-hand side of your home screen.



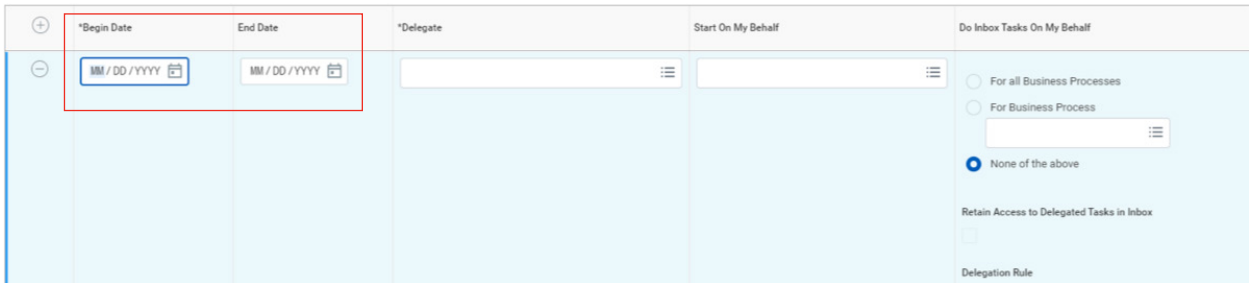
2. Click the down arrow below the Archive tab, then select My Delegations



3. Click Manage Delegations



4. Enter the Begin and End Date for the delegation. At the end of the delegation period, your delegate will lose the ability to review your items.



5. Click the box under \*Delegate and either select or type the name of the person you wish to delegate your tasks to while you are out of the office.

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
	<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text"/>	<input type="text"/>	<div><div><input type="radio"/> For all Business Processes</div><div><input type="radio"/> For Business Process</div><div><input type="radio"/> None of the above</div><div><input type="checkbox"/> Retain Access to Delegated Tasks in Inbox</div><div><input type="text" value="Delegation Rule"/></div></div>

8. Because you are still ultimately responsible for any action taken by your delegate, it is recommended that you choose the option to “Retain Access to Delegated Tasks in Inbox.” Checking this feature will ensure that any task which is not addressed by your delegate remains in your inbox for you to handle.

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
	<input type="text" value="03/11/2020"/>	<input type="text" value="03/13/2020"/>	<input type="text" value="X 'G' Mossanen"/>	<input type="text"/>	<div><div><input checked="" type="radio"/> For all Business Processes</div><div><input type="radio"/> For Business Process</div><div><input type="radio"/> None of the above</div><div><input checked="" type="checkbox"/> Retain Access to Delegated Tasks in Inbox</div><div><input type="text" value="Delegation Rule"/></div></div>

6. If you want your delegate to be able to complete any item that you are responsible for while you are out of the office, select “For all Business Processes.”

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
	<input type="text" value="03/11/2020"/>	<input type="text" value="03/13/2020"/>	<input type="text" value="X 'G' Mossanen"/>	<input type="text"/>	<div><div><input checked="" type="radio"/> For all Business Processes</div><div><input type="radio"/> For Business Process</div><div><input type="radio"/> None of the above</div><div><input type="checkbox"/> Retain Access to Delegated Tasks in Inbox</div><div><input type="text" value="Delegation Rule"/></div></div>

9. Once you have made all of the appropriate selections, click Submit.

New Delegation 1 item

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<div><div><input type="radio"/> For all Business Processes</div><div><input type="radio"/> For Business Process</div><div><input checked="" type="radio"/> None of the above</div><div><input type="checkbox"/> Retain Access to Delegated Tasks in Inbox</div><div><input type="text" value="Delegation Rule"/></div></div>

enter your comment

Submit

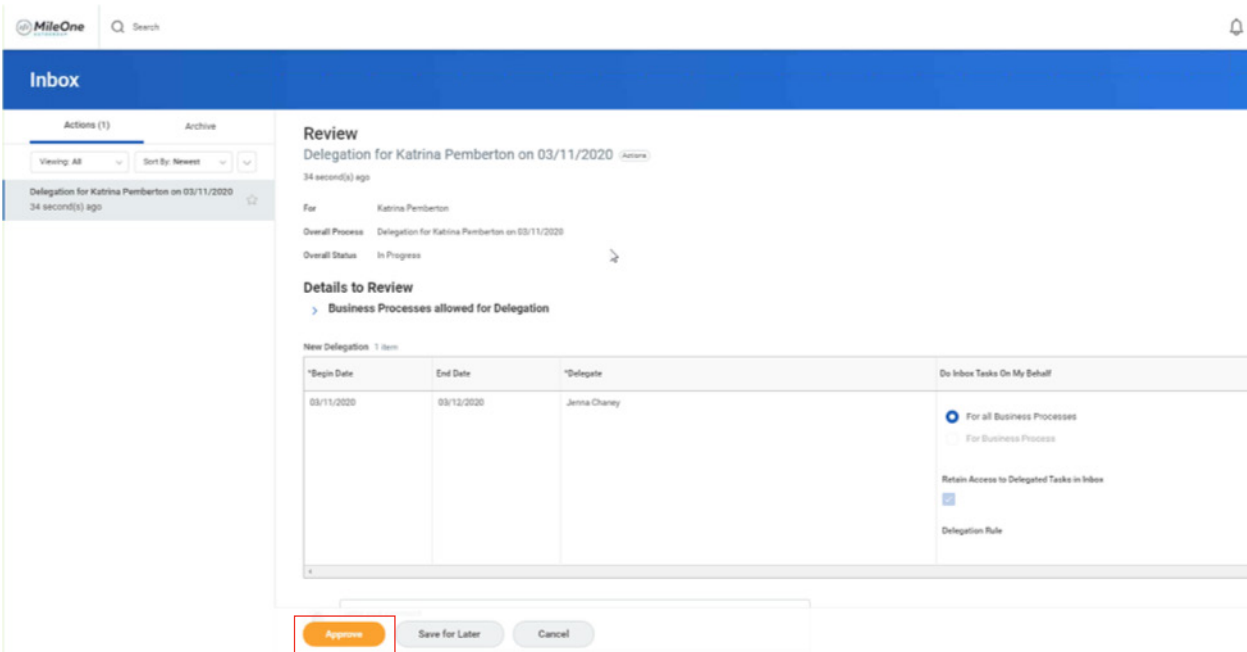
Save for Later

Cancel

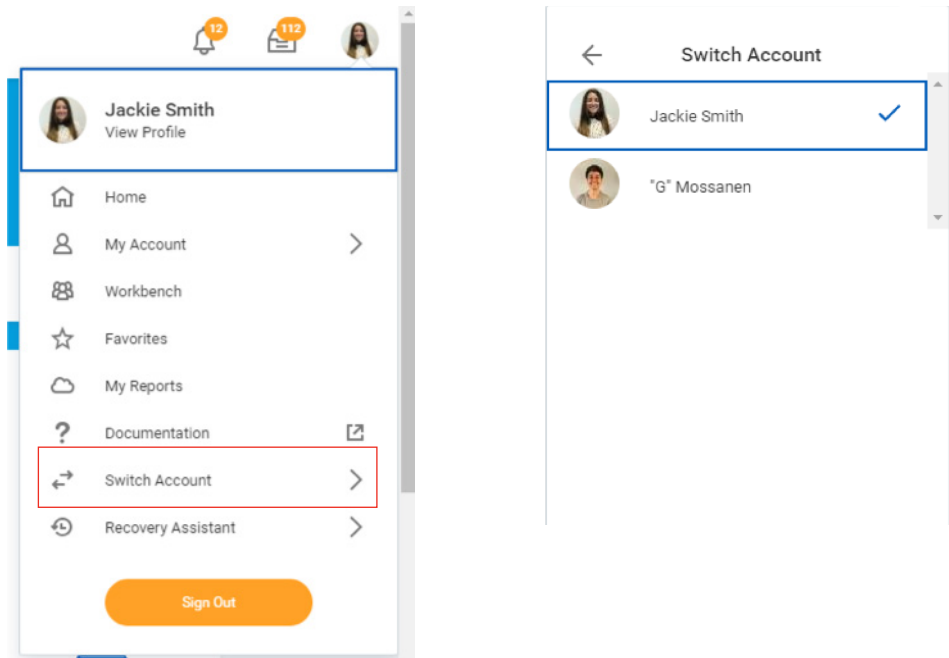
7. If you would like to assign only specific tasks to your delegate, select “For Business Process” and click the empty box below and select the specific tasks that you would like your delegate to handle on your behalf.

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
	<input type="text" value="03/11/2020"/>	<input type="text" value="03/13/2020"/>	<input type="text" value="X 'G' Mossanen"/>	<input type="text"/>	<div><div><input type="radio"/> For all Business Processes</div><div><input checked="" type="radio"/> For Business Process</div><div><div><div>Search</div><div>By Module</div><div>All</div></div></div><div><input type="checkbox"/> Retain Access to Delegated Tasks in Inbox</div><div><input type="text" value="Delegation Rule"/></div></div>

10. Once you hit submit, the delegation request will go to your manager for approval before the delegation takes effect.



When you want to re-access the delegated inbox, you can switch accounts by clicking your profile picture in the top right-hand corner and clicking 'Switch Account' and select the account you wish to switch to.



11. When there is a task that your delegate has been assigned, they will receive an inbox notification. Your delegate will be prompted to "Switch Account" to complete the task.

