Schedule Delegations

Overview
Delegation is a way for Managers and HR Partners to allow another employee to perform tasks that are sent to their inbox when they are away from the office. This will help the process to continue in their absence with minimal disruption.

Who Does This: Managers and HR Business Partner (HRBP)

Things to Know:
- The employee who delegates the task must carefully choose who to delegate tasks to. **The person you delegate to will have visibility to all delegated tasks for selected Business Processes current and past.**
- Best practice is to delegate to a peer or manager not a subordinate.
- You can delegate to be able to start a task or to complete inbox tasks.
- You can delegate the same task to multiple employees.
- You can delegate multiple tasks.
- You will be able to see the history of your tasks completed on your behalf in the archive section of your inbox.

∞ 🔍 delegation	**Step 1** Start typing "**delegation**" into the **Search box.**
Search Results 2 items Tasks and Reports My Delegations View Current Delegations with a button to request de... Tasks, and Business Processes allowed for Delegatic...	**Step 2** Select **My Delegations**.
My Delegations For Current Delegations · Current Task Delegations · Delegation History · Delegated Tasks · Business Processes allowed for Delegation Business Processes allowed for Delegation 108 items Business Processes allowed for Delegation · More ⌄ Business Processes allowed for Delegation 108 items 	Business Process Type	Inbox Actions	Start Business Processes
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Absence Calendar	Yes	
Amend Form I-9	Yes	
Assess Potential	Yes	
Assign Roles	Yes	
Assign Superior	Yes	
Calibrate Team	Yes	
Cascade Goals	Yes			**Step 3** Select the **Business Processes Allowed for Delegation** tab to see a full list. Review to determine which tasks you can delegate. Note: Delegating Inbox Actions allows the delegate to complete your Inbox tasks on your behalf. Delegating Start Business Process allows the delegate to initiate an action on your behalf.

My Delegations

For

Current Delegations Current Task Delegations Delegation History

0 items

Begin Date

Manage Delegations

Step 4
From the **Current Delegations** tab, select **Manage Delegations**.

⊕	*Begin Date 5	End Date 6
⊖	MM / DD /YYYY 📅	MM / DD /YYYY 📅

Step 5
Enter the **Begin Date** (the date you want delegations to start).

Step 6
Enter the **End Date** (the date you want delegations to start).

Note: Use the plus icon ⊕ add rows to if you need to delegate separate Business Processes to different delegates (i.e. Delegate A may Start on your Behalf but Delegate B may not; Delegate A receives Inbox tasks for all Business Processes and Delegate B receives Inbox tasks related to the Job Requisition process alone).
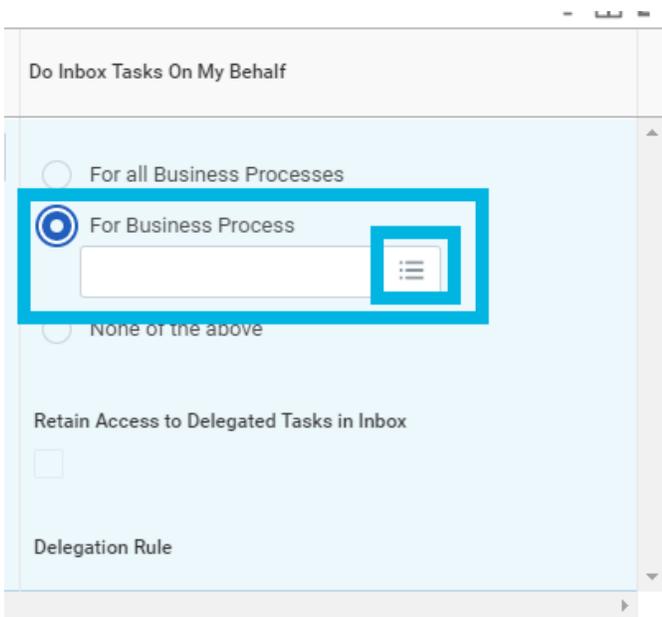
*Delegate

Step 7
Type the name of your delegate in the search field and press **Enter** to select.
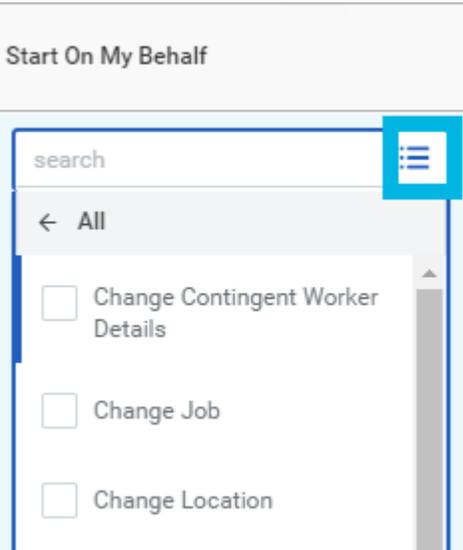
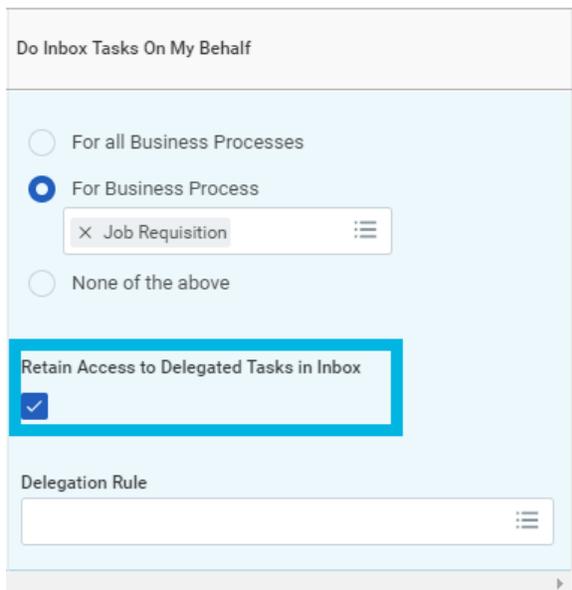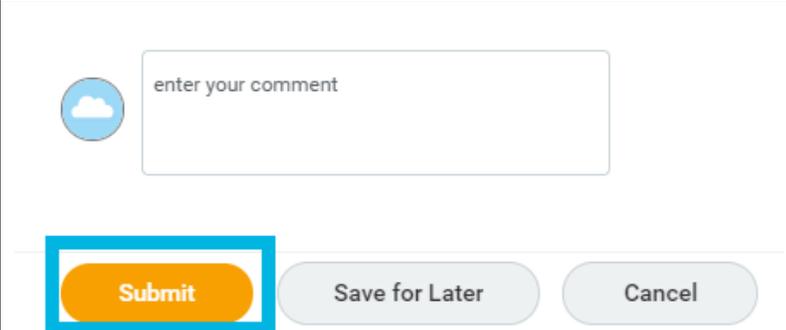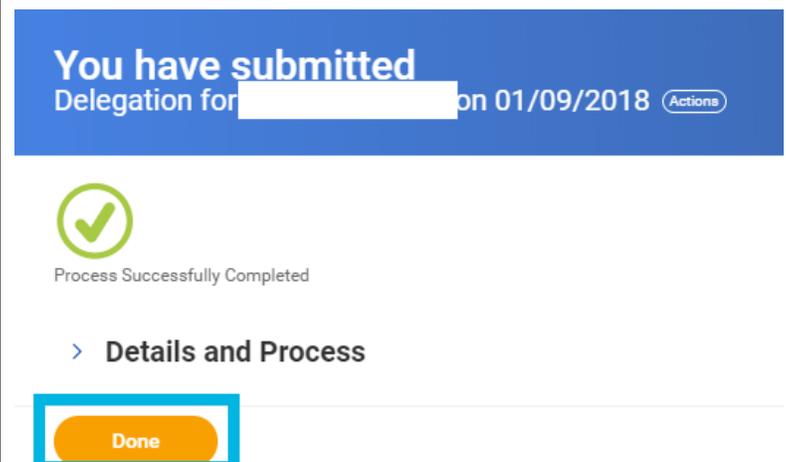|	
Start On My Behalf search ☰ ← All ☐ Change Contingent Worker Details ☐ Change Job ☐ Change Location	**Step 8** In the Start on My Behalf field, use the list icon ☰ to select tasks you would like your delegate to initiate. You may leave this section blank.
Do Inbox Tasks On My Behalf ○ For all Business Processes ◉ For Business Process [ ] ☰ ○ None of the above Retain Access to Delegated Tasks in Inbox ☐ Delegation Rule	**Step 9** In the Do Inbox Tasks On My Behalf field, you will select the Business Processes for which you would like your delegate to complete Inbox tasks on your behalf. Select **For Business Process** and use the list icon ☰ to choose the individual Business Processes (and related Inbox tasks) to delegate. **Note: Choosing processes individually as described above is recommended to avoid your delegate being unintentionally exposed to confidential data they should not see.**
Do Inbox Tasks On My Behalf ○ For all Business Processes ◉ For Business Process [✕ Job Requisition] ☰ ○ None of the above Retain Access to Delegated Tasks in Inbox ☑ Delegation Rule [ ] ☰	**Step 10** Check box to **Retain Access to Delegated Tasks in Inbox**. Selecting this option will allow you to see tasks and retain the history in your archive of completed tasks that you delegate.

enter your comment **Submit** Save for Later Cancel	**Step 11** Enter comments, if applicable, and select **Submit**.
You have submitted Delegation for ▓▓▓▓▓▓ on 01/09/2018 (Actions) ✓ Process Successfully Completed ❯ **Details and Process** **Done**	**Step 12** Select **Done**. Effective with the delegation Begin Date, your delate will be able to Start On Your Behalf and will receive Inbox tasks to complete on your behalf for designated Business Processes.

FAQ's

I started typing "del" and Delegate Task came up, is that the same thing? Delegate task is a different business process that will allow you to delegate current inbox items only. This is not the same thing. You must type in "Delegation" to get to the My Delegations business process.

How do I ensure that the task that I am delegating will be secure? Once you delegate a task using the My Delegation business process, the person you delegate the task to will be able to see all tasks related to the specific business process including your archived tasks. You must take care to ensure that the tasks you are delegating are appropriate. Best practice is to be specific in assigning delegations and carefully choose who and what you delegate.

Can I choose to delegate the task to more than one person? Yes, simply select multiple people to delegate task to in STEP 8.

Can I choose to delegate multiple tasks? Yes, simply select multiple delegation tasks in STEP 10.

What if I made a mistake and delegated to the wrong person ? To check your delegation tasks, go back to the My Delegation page to review or change delegations. Select Manage Delegations to make changes following the steps outlined in this Job Aid.

My Delegations

Will my delegate know when my delegation begins? Yes, your delegate will receive a notification when your delegation begins. However, when using delegation, communication outside of Workday is critical to ensure your delegate is prepared to act on your behalf during your absence. Ultimately, you are responsible for the completion of the delegated tasks.