Delegating Tasks to Yourself

Overview
Used when a manager is out of town, but something time sensitive needs to be approved on their behalf before they return to work (example – somebody requests to take tomorrow off on PTO).

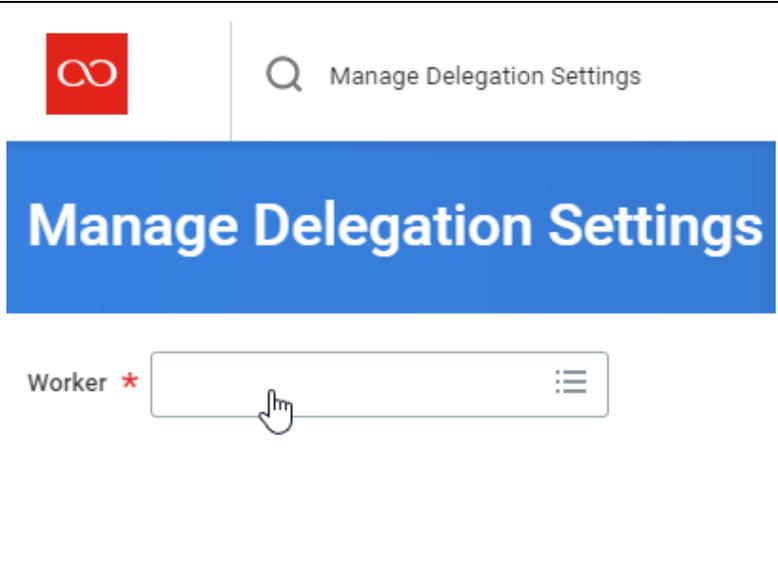**Who Does This:** HR Business Partner

Things to Know:
- Their items will only partially show up in your inbox, you have to switch back and forth.
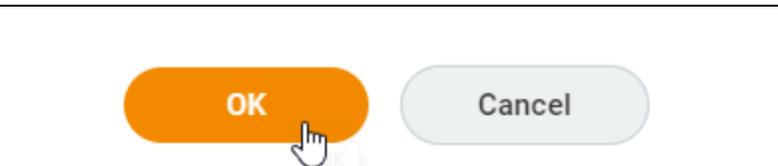- It will only give you access to the BPs you specified when creating this rule.
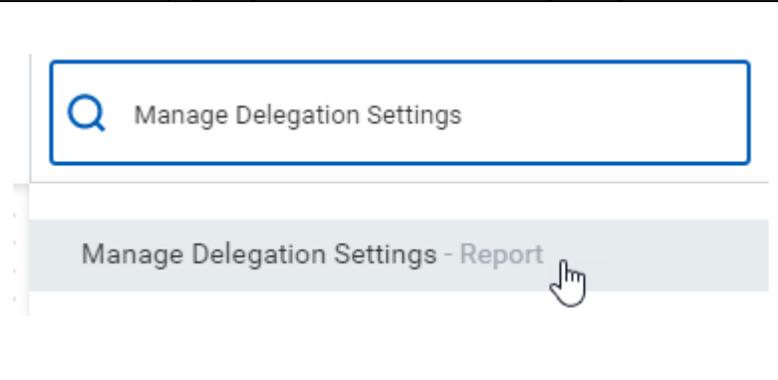
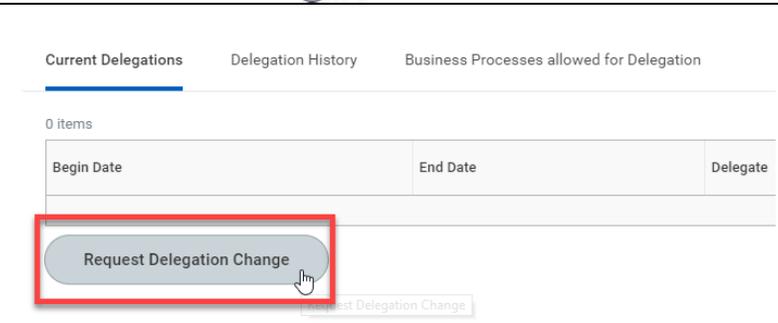|	
	Step 1 Type "Manage Delegation Settings" in the search bar and select "**Manage Delegation Settings - Report**"
	Step 2 Enter the **Manager** who's inbox you need to access (example – the manager who needs to approve the worker's PTO)
	Step 3 Click **OK**
	Step 3 Click the **Request Delegation Change** button.

Business Processes allowed for Delegation New Delegation 1 item ⊕ ***Begin Date** **End Date** ⊖ MM / DD / YYYY 📅 MM / DD / YYYY 📅	**Step 4** Enter the starting date that you need access to certain inbox items for them, and the last day you'll need access to certain inbox items for them. Note: If these dates end up changing, you can come back and edit these later on – even if it's already began or ended.
*Delegate [ ] ☰	**Step 5** Under Delegate, **enter your own name**. You are choosing the person that will receive the inbox items of the person you specified in Step 2. Leave the next column, Start On My Behalf, blank.

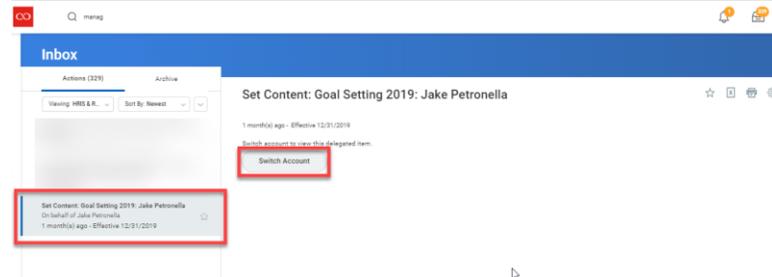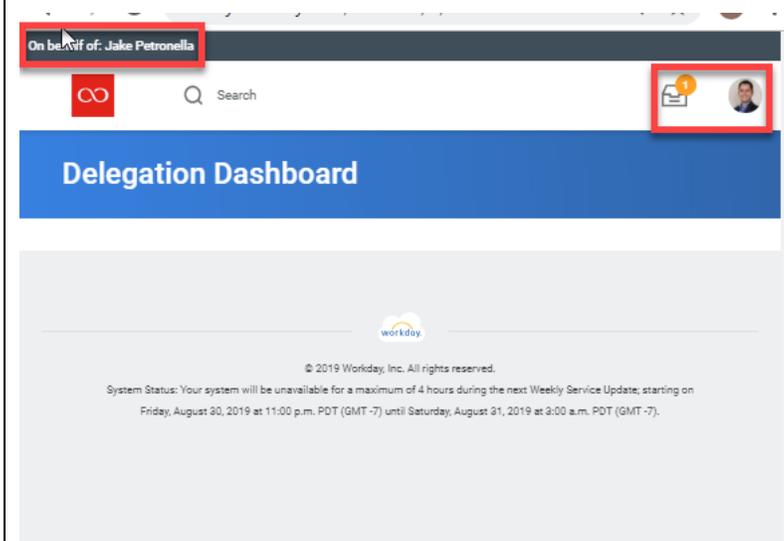|	
Do Inbox Tasks On My Behalf ○ For all Business Processes **6** ● For Business Process × Request Time Off ☰ ○ None of the above **7** Retain Access to Delegated Tasks in Inbox ☑ Delegation Rule	**Step 6** Move the selection from None of the above to **For Business Process**. In the selection field, choose the task that you will need access to Example – by selecting "Request Time Off", all Request time off tasks (approvals and all) during the specified time period for this manager you will have access to. **Step 7** Check the box for **Retain Access to Delegated Tasks in Inbox** This will allow the manager to still have access to their own inbox items, in case they login during the specified time period.
Submit Save for Later Close	**Step 8** Click **Submit**
✓ Process Successfully Completed	**Step 9** All Done! … More below on how to handle the new inbox items
Inbox Actions (329) Archive Viewing: HRIS & R... Sort By: Newest Set Content: Goal Setting 2019: Jake Petronella 1 month(s) ago - Effective 12/31/2019 Switch account to view this delegated item. Switch Account Set Content: Goal Setting 2019: Jake Petronella On behalf of Jake Petronella 1 month(s) ago - Effective 12/31/2019	**Step 10** Find the new inbox items you want to take care of. Once you click on the inbox item, click **Switch Account**

Switch Account You are about to act as Jake Petronella. Do you want to continue? OK Cancel	**Step 11** Click **OK**
On behalf of: Jake Petronella Search **Delegation Dashboard** workday. © 2019 Workday, Inc. All rights reserved. System Status: Your system will be unavailable for a maximum of 4 hours during the next Weekly Service Update; starting on Friday, August 30, 2019 at 11:00 p.m. PDT (GMT -7) until Saturday, August 31, 2019 at 3:00 a.m. PDT (GMT -7).	**Step 12** Click the **inbox icon** on the top right to see that person's inbox. You should see their profile picture in the top right, and their name in a bar across the top of the webpage.

Step 13
You should now see only their inbox items and be able act on them as if you were that person. When you are done, click their profile picture in the top right, and there should be an option to switch accounts back to your regular account.

FAQ's

It didn't do what I wanted? If something didn't work correctly, you can go back to this task, enter the same manager's name again, and edit the delegation by clicking "request delegation change" again. Go through the guide again and make sure you entered in the appropriate fields correctly.

The Manager extended his time off, I need access to their inbox longer. You can go back to this task and edit the time that you access this task from their inbox.

The request for PTO came in the day before the Manager went on PTO, they just didn't approve it in time. What do you I do? You cannot start the delegation process on a day earlier than today's current date. However, this task will pull all the tasks matching the BPs you choose from their inbox regardless of the day they were put in their inbox. The date range the you choose during this process is just the dates that you'll have access to those inbox items. So, the item you're looking for based on the bolded question should be in your inbox.