Manage Delegation

This How-to Guide covers how to **delegate tasks** to another employee, as well as see any items that have been delegated to you.

Note: Delegations are temporary and require a start and end date. Please do not delegate tasks for more than one year.

Start Here

1. Open **Google Chrome.**
2. Navigate to **Workday.**
3. If prompted, login with your **College email** and **password.**
4. Using the **global search bar**, search for and choose "My Delegations."
5. On the **My Delegations** page, you can manage your current business process delegations and review the tasks that have been assigned, approved, reviewed, and so on.
6. At the top of the My Delegations screen, select the **Business Processes allowed for Delegation** tab to see a list of all business processes that can be delegated.
7. To create a new delegation, from the Current Delegations tab select **Manage Delegations.** On the Business Processes allowed for Delegation screen, fill in the requested information in a blank line or use the plus sign to add a new delegation. Note that any field with an asterisk is required.
8. The key fields are as follows:
    - **Begin Date** and **End Date**: The date range during which you want this delegation to apply.
    - **Delegate**: The employee(s) to whom you are delegating your tasks. Search by first or last name and hit enter.
    - **Use Default Alternate**: When checked, the manager of any listed delegate functions as a backup for your delegate. If unchecked, manually choose an Alternate Delegate.
    - **Start on My Behalf:** allow someone else to submit a request on your behalf. For example: Create Expense Report, Create Spend Authorization, Enter My Time, Review Time

- **Do My Tasks On My Behalf:** have someone take action or approve on your behalf. For example: Expense Report Event (allows your delegate to approve expense reports on your behalf)
    - **For All Business Processes:** your delegate will be able to complete all My Tasks items. If using, leave the box for **Retain Access** checked.
    - **For Business Process**: your delegate will be able to complete My Tasks items for only the business processes you specify in this field.
    - **None of the above**: leave checked if only using **Start on My Behalf**

9. Use the Plus icon in the top left of the grid to add or remove Delegations.
10. When finished, enter Comments or Attachments and select **Submit**. You will see a confirmation message. Your delegations will need to be approved before they take effect.

Reviewing Delegation Requests

Managers will receive an approval item in their **My Tasks**. Select that task, review the Delegation details, and select **Approve** or Deny. If you select **Deny**, a **Reason** is required.

Acting as a Delegate

Once a Manager has approved a delegation, you will receive a notification in Workday. To perform those tasks, switch to that individual's account in Workday.

1. Select your profile picture in the top right.
2. Scroll down and select **Switch Account**. You will see the individual who delegated to you.
3. Select their account to see all the tasks delegated to you by that individual.

Have Questions? For assistance, please contact help@brynmawr.edu or 610-526-7440.