Manage Delegation

This How-to Guide covers how to **delegate tasks** to another employee, how delegations are approved by a manager, and how to 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.**

Setting Up Delegations

1. Using the **Workday search bar**, search for and choose **My Delegations**.
2. To create a new delegation, from the **Current Delegations** tab select **Manage Delegations.**
3. To set up a new delegation, enter information in an existing blank or select the **plus (+) button** to add a new delegation line. Each delegation must include the following:
    - **Begin Date** and **End Date**: The date range during which you want this delegation to apply.
    - **Delegate**: Select the employee(s) who will act on your behalf. You can search by first or last name and press Enter.
    - **Use Default Alternate**: leave checked.
        - If you are your delegate's direct supervisor, you may get an error, particularly for delegations related to expenses. If that happens, select someone else that could approve actions on your behalf, such as a peer, in the **Alternate Delegate** box.
4. There are two types of delegations in Workday:
    - **Start on My Behalf:** allows a delegate to complete a business process.

- **Do My Tasks On My Behalf:** allows a delegate to take action or approve on your behalf.

5. There are two options under **Do My Tasks on My Behalf:**
    - **For All Business Processes**: Select this option if you want your delegate to be able to complete *all* tasks that appear in your Workday Inbox during the specified date range.
        - **Retain Access**: leave checked to ensure that you will see any tasks that were not completed during the delegation period.
    - **For Business Process:** Select if you want to limit your delegate for certain business processes. Commonly delegated business processes are explained below.
    - **None of the Above:** Leave this option selected if you are using **Start on My Behalf** only.
6. Select **Submit**. You will see a confirmation message. Your delegations will need to be approved before they take effect.

Reviewing Delegation Requests

When someone sets up a delegation, the delegation request will route to their direct supervisor for approval. Managers can review requests in their **My Tasks**. Select the task, review the delegation details, and select **Approve** or **Deny**. If you select **Deny**, a **Reason** is required.

Acting as a Delegate

To perform delegated tasks, you need to switch to that individual's account in Workday.

- You will **not** be able to act on any delegated tasks/approvals until you have switched accounts, even if they appear in your **My Tasks**.
- When you have switched accounts, you will see this banner on the top of your screen:

1. Select your profile picture in the top right.

2. Scroll down and select **Switch Account**. You will see the individual(s) who have made you their delegate.
3. Select the appropriate individual. This will bring you to the **Delegation Dashboard**.
   a. To start/complete tasks: select the appropriate option (such as Create Expense Report) from the list of delegated tasks.
   b. To act on approval tasks: you will have to select **My Tasks** for the individual **after** you have already switched to their account. Approval tasks **will not** be listed as an option on the Delegation Dashboard.
4. When your work is complete, select the **profile icon** and then **Switch Account** to switch back into your own account.

Modify, Remove or Add an Additional Delegation

1. Using the **Workday search bar**, search for and choose **My Delegations**.
2. From the **Current Delegations** tab select **Manage Delegations.**
   - To modify a delegation: Make any edits to your delegations and select **Submit**.
   - To remove a delegation: use the **minus (-) button** to remove any delegations and select **Submit**.
   - To add an additional delegation: use the **plus (+) button**, add the delegation information and select **Submit**.
3. Any changes or cancellations will route to your supervisor for approval.

Commonly Delegated Business Processes

Time and Absence Delegations

Delegation	Allows your delegate to:	Delegation Type/Column
Enter Time	Approve timesheets routed to you for approval.	Do My Tasks on My Behalf.
Request Time Off + **Correct Time Off*** *Both need to be added	Approve time-off requests for other employees.	Do My Tasks on My Behalf.

Note: if you are planning to delegate timesheet approval, we recommend using **all three delegations listed above** (**Enter Time, Request Time Off, and Correct Time Off**). This will ensure that if someone enters a time off request, it can be approved along with the time entered on timesheets.

Expense Delegations

Delegation	Allows your delegate to:	Delegation Type/Column
Create Expense Report	Generate expense reports for College Credit Card or personally paid purchases.	Start On My Behalf
Create Spend Authorization	Generate cash advance requests or requests for pre-approval of travel.	Start On My Behalf
Create Receipt	Create receipts for purchase orders that you requested.	Start On My Behalf
Create Receipt Adjustment	Adjust receipts for purchase orders that you requested.	Start On My Behalf
Requisition Event	Review and approve purchase requisitions submitted to you as a Cost Center Manager.	Do My Tasks on My Behalf
Expense Report Event	Review and approve Expense Reports (both College Credit Card and personal reimbursement) submitted to you as a Cost Center Manager.	Do My Tasks on My Behalf
Spend Authorization	Review and approve cash advances and pre-approval of travel requests submitted to you as a Cost Center Manager.	Do My Tasks on My Behalf
Supplier Invoice Request Event **+** **Supplier Invoice Event*** * Both need to be added	Review and approve supplier invoice requests submitted to you as a Cost Center Manager.	Do My Tasks on My Behalf

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