

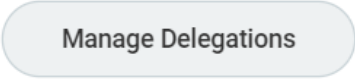


## DELEGATIONS

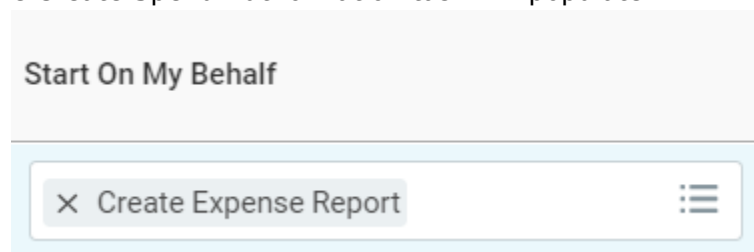
Workday is the system of record for the HR, Payroll, and Financial processes, so it is imperative that employees **carefully review** all inbox items before submittal or approval. Employees need to be cautious about delegating processes and approvals.

For example, administrators and managers should only delegate the initiation of processes and NOT approvals to their support staff. Only managers should be delegated approvals. If an administrator or manager is on vacation, or out of the office, he or she should delegate to an appropriate administrator or manager of sufficient level of authority that could be approving those items and would be responsible and accountable for them. Under NO circumstances should administrators or managers delegate their entire inbox to their classified staff.

## DELEGATE A TASK

 my delegations

1. Type into the Search Bar: **My Delegations**.
2. Your current delegations, if any, will appear.
3. Click the  button.
4. Use and the **Calendar** icon  or type to indicate a **Begin Date** and an **End Date**. It is recommended that this be done once a year and the End Date be end of the Fiscal year (aka 06/30).
5. Use the **Prompt** icon  to in the **Delegate** field to indicate the worker or workers to whom you are delegating.
6. Type **Spend (or any other applicable task)** in the Start on My Behalf field and click **Enter**. The Create Spend Authorization task will populate.



Start On My Behalf

× Create Expense Report

7. Do **NOT** touch the **Do Inbox Tasks On My Behalf** section. This is only used for if an employee is going on vacation or taking a leave and they are delegating their Inbox approvals/notifications for a short period of time.

Do Inbox Tasks On My Behalf

☐ For all Business Processes  
☐ For Business Process  
☒ None of the above

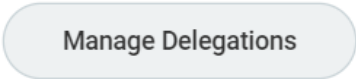


Retain Access to Delegated Tasks in Inbox

Submit

- Click to forward this delegation on for approvals.

## DELEGATE YOUR INBOX

Q my delegations

- Type into the Search Bar: **My Delegations**.
- Your current delegations, if any, will appear.
- Click the  button.
- Use and the **Calendar** icon  or type to indicate a **Begin Date** and an **End Date**. It is recommended that this be done once a year and the End Date be end of the Fiscal year (aka 06/30).
- Use the **Prompt** icon  to in the **Delegate** field to indicate the worker or workers to whom you are delegating.
- Leave the **Start On My Behalf** field blank.
- If leaving on vacation, then select **For all Business Processes**. If only delegating approvals for specific processes, then select the **For Business Process** and type in the process (es) in the blank field.

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

- It is highly recommended to check the **Retain Access to Delegated Tasks in Inbox** checkbox.

Submit

- Click to forward this delegation on for approvals.