

# Getting Started: Setting Up Delegation

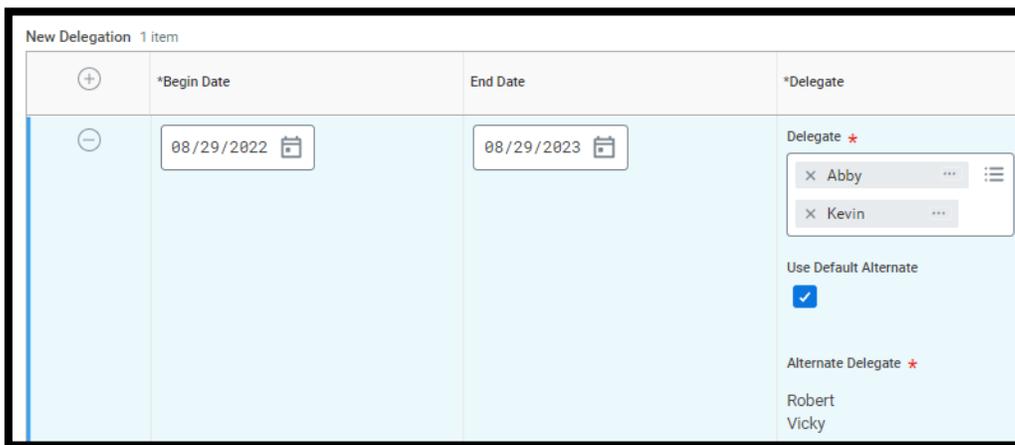
True **Delegation** is available so Managers can designate individuals who can perform certain functions in Workday on their behalf.

1. Navigate to your Workday Inbox. 
2. On the bottom left of the navigation pane, click **Manage Delegations** 
3. Click **Manage Delegations** again at the bottom of the next screen.

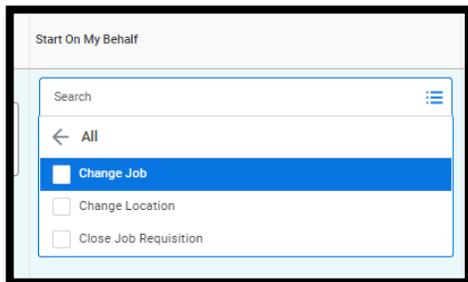


## IDENTIFYING THE DELEGATE

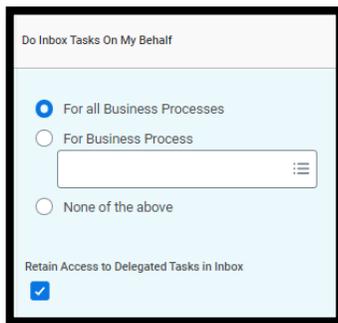
4. **Begin Date:** Enter today's date.
5. **End Date:** Enter a date, typically one year from today.
6. **Delegate:** Enter the person's name by typing it and hitting Enter.  
*You may choose more than one in the same row.*
7. **Use Default Alternate:** leave this check box checked.  
*This means any transactions related to the delegates will route to these alternate people instead of the delegate themselves.*



## IDENTIFYING WHAT THEY CAN DO



8. **Start On My Behalf:** choose from the drop down to delegate certain initiation actions (meaning these people can start these types of transactions for you).  
*Note that this doesn't mean they can always complete them.*  
*For example, if you delegate Change Job and the delegate moves a worker to per diem, you will get the task to ensure accurate compensation.*  
**Delegates do not have view access to compensation details.**



9. **Do Inbox Tasks On My Behalf:** choose from the available radio buttons and/or the drop down to delegate the ability to take action on certain inbox tasks that route to you. Always leave the **Retain Access to Delegated Tasks in Inbox** checked.  
*Only certain types of inbox tasks (tasks that route to you) can be delegated.*

## COMPLETING YOUR SETUP

10. Click **Submit** to complete your delegation setup.

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## SINGLE TASK DELEGATION

If you delegate a single task, rather than full delegation of certain types of tasks, You can see these listed on the **Current Task Delegations** tab.

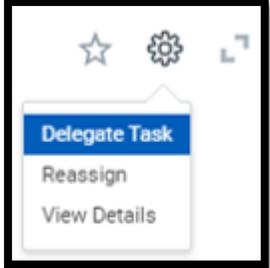
You can un-delegate these tasks from this screen by:

1. Click the related actions (brick icon) on the blue link under Business Process
2. Hover over **Business Process** and choose **Delegate Task**.
3. Choose **Stop Current Delegations** and then click **Submit**.

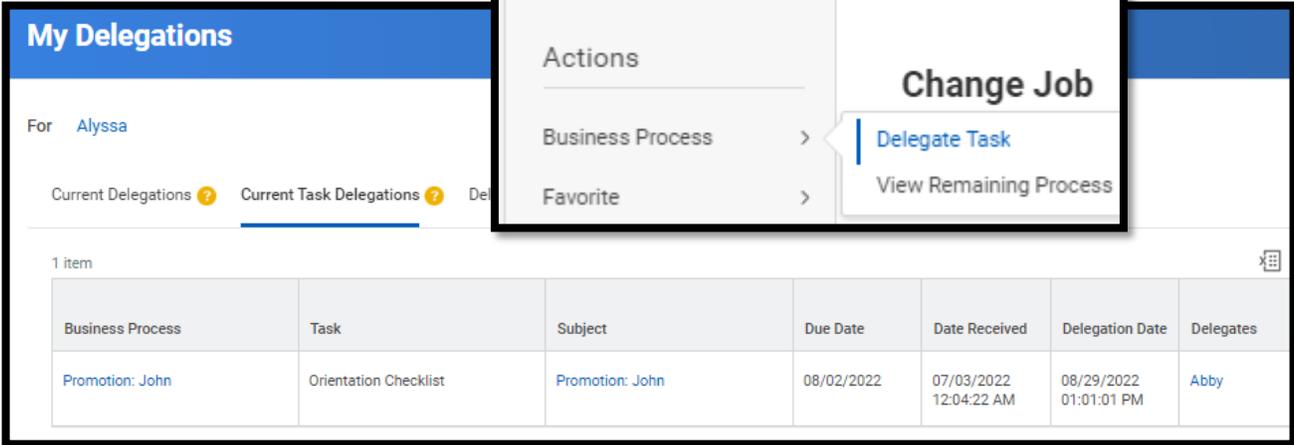


**Note:** To delegate a single task, use the gear icon in your inbox and choose **Delegate Task**.

Not all tasks have to delegation.



The screenshot shows a menu with three options: 'Delegate Task' (highlighted in blue), 'Reassign', and 'View Details'. Above the menu are icons for a star, a gear, and a refresh symbol.



The screenshot shows the 'My Delegations' interface for user Alyssa. It features a 'Change Job' dropdown menu with options 'Delegate Task' and 'View Remaining Process'. Below the menu is a table with one item:

Business Process	Task	Subject	Due Date	Date Received	Delegation Date	Delegates
Promotion: John	Orientation Checklist	Promotion: John	08/02/2022	07/03/2022 12:04:22 AM	08/29/2022 01:01:01 PM	Abby

## OTHER TERMINIOLOGY TO BE AWARE OF

- True **Delegation** (as described above) is so Managers can designate individuals who can perform certain functions in Workday on their behalf. It can be set up by any manager via Manager Self-Service. There is a second job aid available for [acting as a delegate](#).
- **Matrix Management** is the functionality used when managers with large spans of control need assistance with Talent Management functionalities such as Performance Evaluations. More information on Matrix Management can be found [here](#); or instructions on acting as a Matrix Manager are also available.
- **Administrative Support** is a custom-built security role. This role is limited to specific types of managers and specific spans of control and must be requested through your HR Partner.
- **Manager Self-Service (MSS)** is the terminology used when describing actions that Managers have the ability to initiate and the things Managers are able to see. Managers have more functionality than the three roles above combined. One example of a functionality that MSS allows but is not available outside of MSS is viewing and modifying compensation for employees. **Note:** most MSS actions can also be completed by the **Manager's Manager** (aka the indirect manager). Please review the respective job aids for the actions you wish to take as a Manager's Manager.