

Workday Concept: Delegation



What is delegation and how is it used in Workday?

- Delegations are **temporary** reassignments of tasks to another user, enabling that user to perform individual actions on your behalf
- You may delegate your **entire Inbox or specific business processes** from your Inbox, for a specified period of time.


Will my appointed delegate have access to my personal information?

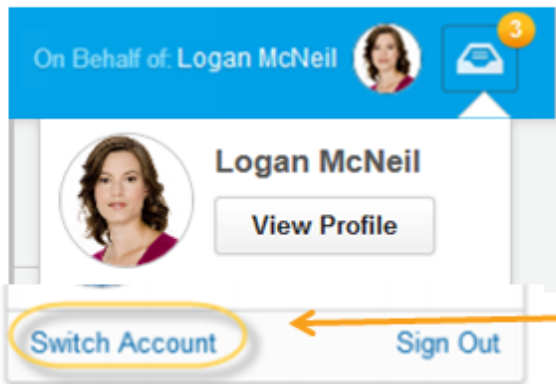


- **No—delegation does not confer your security role** to your appointed delegate.
- Delegates will only have access to review and complete tasks for the business processes you select when appointing a delegate

Workday Concept: Delegation Example

A Human Resources Generalist (HRG) is going on vacation and needs to have their tasks performed by another HRG. In this case, the HRG delegates their Inbox to the second HRG who is filling in. When the original HRG returns, they resume their own tasks.

1. The delegate clicks the **Inbox icon** in the upper-right corner. 
2. From their Workday Inbox, they click **Actions** and select the task they wish to complete.
3. An automated response will indicate “This account is not authorized to view this content”. **The delegate selects the Switch Account button** to complete the delegated task.
4. When logged into the original HRG’s account, the delegate completes awaiting actions listed in the **Inbox**.



5. Once the delegate completes all actions, they click the **name or picture** in the upper-right corner of the screen.
6. As a final step, the delegate switches back to their Workday account by **clicking Switch Account**.