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. Workday also enables you to delegate the Initiating Action of business processes (i.e., a faculty member can delegate the ability to create expense reports to their financial assistant).

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.

For additional information or questions about the Workday@Yale program, please visit the program website at [http://Workday.Yale.edu/](http://Workday.Yale.edu/) or email us at Workday@Yale.edu.
Workday Concept: Delegation Example

Scenario

Your manager is going on vacation for two weeks and delegates her Workday Inbox tasks to you. During this time, delegated Workday Inbox tasks will display in your Workday Inbox. The Action will display “On Behalf of”, followed by the name of the delegator (your manager). Follow the steps below to complete actions delegated to you:

1. Begin on your home screen in Workday and click your Inbox icon in the upper-right corner.

2. From your Workday Inbox, click Actions and select the task you wish to complete.

3. An automated response will indicate “This account is not authorized to view this content”. Select the Switch Account button to complete the delegated task.

4. When you are logged into your manager’s account, complete awaiting actions listed in the Inbox.

5. Once you complete all actions, click your name or picture in the upper-right corner of the screen.

6. As a final step, switch back to your Workday account by clicking Switch Account.

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