

Establish Delegations – Internal Service Delivery Approvals

Use when you need to delegate a task

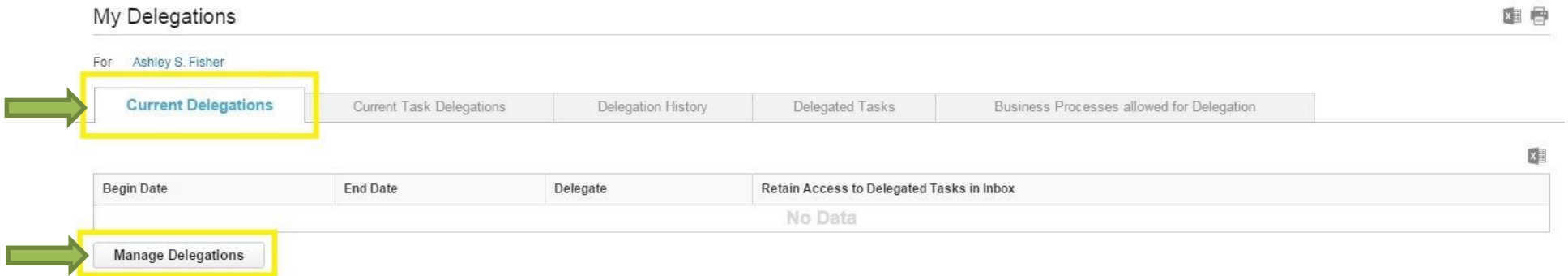
How to Access Delegations

Note: All Asterisks (*) need to be completed.

Access the My Delegations task



1. The **My Delegations** page will display:
 - a. Under the **Current Delegations** tab, click **Manage Delegations**.



My Delegations 📄 🖨️

For Ashley S. Fisher

Current Delegations | Current Task Delegations | Delegation History | Delegated Tasks | Business Processes allowed for Delegation

Begin Date	End Date	Delegate	Retain Access to Delegated Tasks in Inbox
No Data			

Manage Delegations

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2. Under **Manage Delegations**, the **Business Processes allowed for Delegation** will display. This is where you will set up your delegate.

Manage Delegations Ashley S. Fisher

Business Processes allowed for Delegation

New Delegation

+/-	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
-	MM/DD/YYYY	MM/DD/YYYY	search	search	<input type="radio"/> For all Business Processes <input type="radio"/> For Business Process search <input checked="" type="radio"/> None of the above Retain Access to Delegated Tasks in Inbox <input type="checkbox"/> Delegation Rule

enter your comment

Attachments




Drop files here

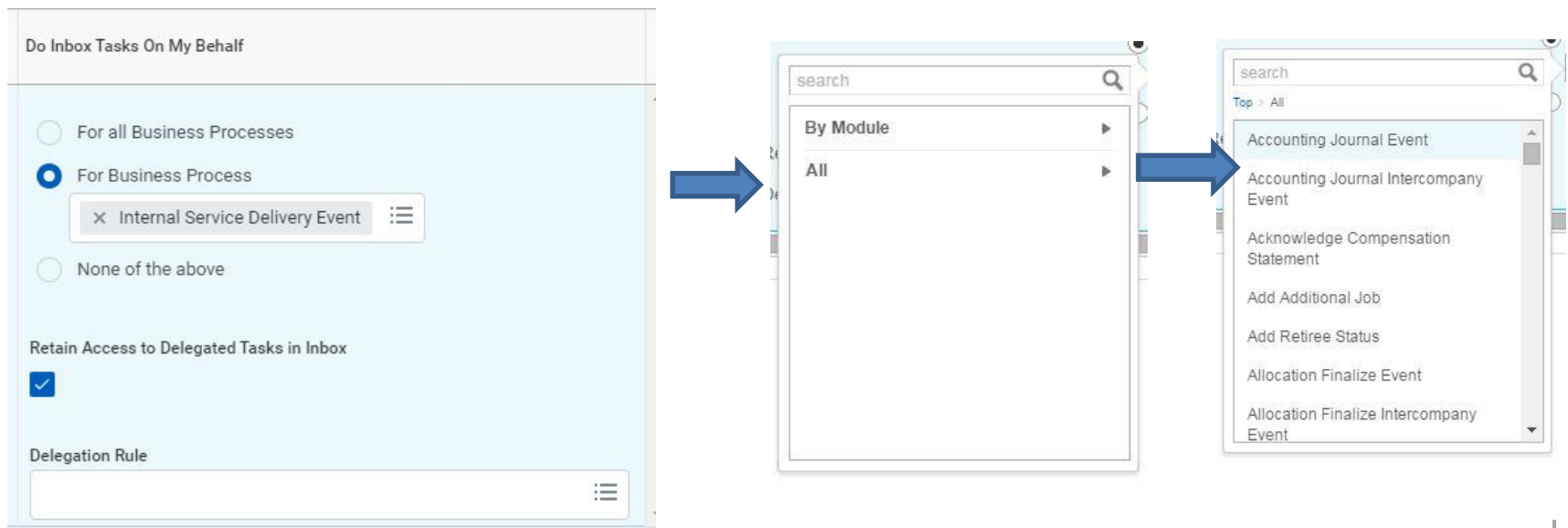
Submit Save for Later Cancel

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3. Under **New Delegation**:

- a. Under **Begin Date**, type or select the date you want the delegate’s task to start. Use the calendar icon if needed. 
- b. Under **End Date**, type or select the date you want the delegate’s task to end. Use the calendar icon if needed. 
- c. Under **Delegate**, type or select the name of the person you will be delegating the task to. This is the person who you will be delegating spend authorizations and expense reports to.
 - i. In the search box, type the first name and last name of the person and press Enter.
 - ii. You can also use the Prompt to select a name from the drop down menu. 
- d. Under **Do Inbox Tasks On My Behalf**:
 - i. Select **For Business Process**.
 - ii. In the search box, type the task or use the Prompt to select the task.
 1. Type **Internal Service Delivery Event** and press Enter.



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e. For **Retain Access to Delegated Tasks in Inbox**:

- i. If **you do NOT want to see the tasks in your Inbox**, but want them **sent to the delegate** for further action, **do NOT click the box**. Only the delegate will see the tasks as they come in.
- ii. If you want tasks posted to **both your inbox and the delegate's inbox** for further action, **click the box to place a checkmark**. Both you and the delegate will see the tasks as they come in.

Do Inbox Tasks On My Behalf

For all Business Processes

For Business Process

None of the above

Internal Service Delivery Event

Retain Access to Delegated Tasks in Inbox

Delegation Rule

Do Inbox Tasks On My Behalf

For all Business Processes

For Business Process

None of the above

Internal Service Delivery Event

Retain Access to Delegated Tasks in Inbox

Delegation Rule

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4. When you finish completing the **New Delegation** section, click **Submit** for final approval.

Note: No attachments are needed.

Manage Delegations Ashley S. Fisher

Business Processes allowed for Delegation

New Delegation 1 items

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks
	02 / 02 / 2016	06 / 30 / 2016	X Michael J Cooper	X Create Expense Report X Create Spend Authorization	<input type="radio"/> For all Business Processes <input checked="" type="radio"/> For Business Process X Expense Report Event X Spend Authorization <input type="radio"/> None of the above

Retain Access to Delegated Tasks in Inbox

Delegation Rule

Alerts: 1

When you delegate the creation of an item, you give the delegate access to all of your previously created items of that type.

enter your comment

Attachments

Drop files here

Submit Save for Later Cancel



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5. The next step in the approval process will display.

Up Next

Kathleen R. Tetreault
Approval by Manager
Due Date 01/21/2016

Details and Process

For Ashley S. Fisher
Overall Process Delegation for Ashley S. Fisher on 02/02/2016
Overall Status In Progress
Due Date 01/21/2016

Details | Process

> Business Processes allowed for Delegation

New Delegation 1 items

Begin Date	End Date	Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
02/02/2016	06/30/2016	Michael J Cooper	Create Expense Report Create Spend Authorization	<input type="radio"/> For all Business Processes <input checked="" type="radio"/> For Business Process Expense Report Event Spend Authorization Retain Access to Delegated Tasks in Inbox: Yes Delegation Rule

Done

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6. You can check the status of the approval process by clicking **Details and Process**.
7. Click the **Process** tab to check the status.
8. Click **Done** when complete.

The screenshot displays a user interface for managing delegations. At the top, under 'Up Next', the user Kathleen R. Tetreault is shown with the role 'Approval by Manager' and a due date of 01/21/2016. A green arrow points to the 'Details and Process' link. Below this, details for a delegation for Ashley S. Fisher are shown, including the overall process 'Delegation for Ashley S. Fisher' on 02/02/2016, an overall status of 'In Progress', and a due date of 01/21/2016. A second green arrow points to the 'Process' tab in the navigation bar. The 'Process History' section contains a table with two items:

Process	Step	Status	Completed On	Due Date	Person	Comment
Request Delegation Change	Request Delegation Change	Step Completed	01/20/2016 05:30:21 AM	01/21/2016	Ashley S. Fisher	
Request Delegation Change	Approval by Manager	Awaiting Action		01/21/2016	Kathleen R. Tetreault (Manager)	

A third green arrow points to the 'Done' button at the bottom left of the interface.

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9. The Manager will need to approve the delegation.
10. Click **Approve**.

The screenshot displays the Workday interface for reviewing a delegation. The top navigation bar includes the Workday logo and the user's name, Kathleen R. Tetreault. The main content area is titled "Review Delegation for Ashley S. Fisher" and shows the delegation details, including the overall process, status, and due date. A table titled "New Delegation" lists the delegation details, including the start and end dates, the delegate, and the tasks to be performed. The "Approve" button is highlighted with a blue arrow.

Review Delegation for Ashley S. Fisher on 02/02/2016

4 minute(s) ago - Due 01/21/2016

For: Ashley S. Fisher

Overall Process: Delegation for Ashley S. Fisher on 02/02/2016

Overall Status: In Progress

Due Date: 01/21/2016

Details to Review

Business Processes allowed for Delegation

New Delegation 1 items

*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
02/02/2016	06/30/2016	Michael J Cooper	Create Expense Report Create Spend Authorization	<input type="radio"/> For all Business Processes <input checked="" type="radio"/> For Business Process Expense Report Event Spend Authorization Retain Access to Delegated Tasks in Inbox <input checked="" type="checkbox"/> Delegation Rule

enter your comment

Process History

Ashley S. Fisher - Due 01/21/2016

Approve Deny Save for Later Cancel

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11. The **Success** page will display.

The screenshot shows the Workday user interface. At the top, there is a search bar, the Workday logo, and a user profile for Kathleen R. Tetreault. The main content area is titled "Inbox" and displays a list of tasks on the left and a detailed view of a completed task on the right. The detailed view shows a green checkmark icon and the text "Success! Event approved Delegation for Ashley S. Fisher on 02/02/2016". Below this, it says "Process Successfully Completed" and "Details and Process". A "Done" button is visible at the bottom of the detailed view.

workday

On behalf of: Kathleen R. Tetreault

Inbox

Actions 8 Archive 256

Viewing: All Sort By: Newest

Delegation for Ashley S. Fisher on 02/02/2016 4 minute(s) ago - Due 01/21/2016

Supplier Accounts Match Event for Supplier Invoice: SUPP_INV-000021251 4 day(s) ago - Due 01/17/2016

Supplier Accounts Match Event for Supplier Invoice: SUPP_INV-000022095 4 day(s) ago - Due 01/17/2016

Supplier Accounts Match Event for Supplier Invoice: SUPP_INV-000020104 5 day(s) ago - Due 01/16/2016

Supplier Accounts Match Event for Supplier Invoice: SUPP_INV-000019607 6 day(s) ago - Due 01/15/2016

Supplier Accounts Match Event for Supplier Invoice: SUPP_INV-000020874 11 day(s) ago - Due 01/10/2016

Supplier Accounts Match Event for Supplier Invoice: SUPP_INV-000018813 1 month(s) ago - Due 12/18/2015

Success! Event approved Delegation for Ashley S. Fisher on 02/02/2016

4 minute(s) ago - Due 01/21/2016

Process Successfully Completed

Details and Process

Done

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12. The **Overall Status** will state **Successfully Completed**.

13. Click **Done**.

The screenshot shows the Workday interface. At the top, there is a search bar, the Workday logo, and the user's name 'On behalf of: Kathleen R. Tetreault'. The main content area is titled 'Inbox' and displays a notification: 'Success! Event approved Delegation for Ashley S. Fisher on 02/02/2016'. Below the notification, there is a green checkmark icon and the text 'Process Successfully Completed'. Underneath, there is a section titled 'Details and Process' with the following information: 'For Ashley S. Fisher', 'Overall Process Delegation for Ashley S. Fisher on 02/02/2016', 'Overall Status Successfully Completed', and 'Due Date 01/21/2016'. A green arrow points to the 'Successfully Completed' status. Below this, there is a section titled 'Business Processes allowed for Delegation' with a table showing the delegation details. A blue arrow points to the 'Done' button at the bottom left of the notification card.

Begin Date	End Date	Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
02/02/2016	06/30/2016	Michael J Cooper	Create Expense Report Create Spend Authorization	<input type="radio"/> For all Business Processes <input checked="" type="radio"/> For Business Process Expense Report Event Spend Authorization

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14. The **Delegate** will receive a **Notification**.

15. The **Delegate** is notified about the **Delegated Task(s)** from the **Delegator**.

The screenshot displays the Workday user interface. At the top, there is a search bar, the Workday logo, and the user's name, Michael J. Cooper. The main content area is titled "Notifications" and shows a list of notifications from the last 30 days. The notifications are sorted by "Newest". The first notification, "Workday Delegated Tasks Update", is highlighted with a blue border and a green arrow pointing to it. This notification was received "2 minute(s) ago". To the right of the notification list, a "View Notification Message" pane is open, displaying the details of the selected notification. The message states: "The following Delegation has been approved and completed to delegate Inbox tasks and notifications to you:". Below this, the details are: "Delegating User: Ashley S. Fisher", "Begin Date: 02/02/2016", "End Date: 06/30/2016", "All Business Processes: No", "Specific Business Processes: Expense Report Event, Spend Authorization", and "Retain Access to Delegated Tasks: Yes". A button labeled "View Entire Delegation Inbox" is located below the message details. A second green arrow points to the "View Entire Delegation Inbox" button.