

When to Use This Event

Use this event when you need to temporarily delegate your work to someone else because you will out of the office or otherwise unavailable to complete or approve transactions in Workday. Delegation can be requested for no longer than three weeks at a time, and requires your manager's approval. Additionally, only certain tasks in Workday can be delegated. The tasks that can be delegated are Creating/Approving Job Requisitions, Approving a TSM's Organization Assignment Change, or Terminating a TSM.

Create a Delegation to Initiate and/or Approve Business Processes on your Behalf

To return to the *Workday Homepage*, click on the **Workday** icon at the top left of the screen.

Click on the *icon in the upper right hand corner*:

1. Click **View profile**
2. Select the **Actions**
3. Hover over the **Business Process** hyperlink
4. Click on **My Delegations**
5. On the My Delegations page, click the **Manage Delegations** button to access the Manage Delegation page
6. Enter a **Begin Date** – it must be the current date or a future date
7. Enter an **End Date** not greater than three weeks from the **Begin Date**
8. Click on the **Prompt** button in the **Delegate** field and enter the name of a person (or more than one person) to whom you will delegate
9. Click on the **Prompt** button in the **Start on My Behalf** field and navigate through the drop-down menus to choose the business processes from the menu that the Delegate will initiate on your behalf. If you would only like your Delegate to review/approve items in your inbox, and not initiate anything on your behalf, leave this field blank
10. After populating the **Start on My Behalf** field you will receive an Alert that states: When you delegate the creation of an item, you give the delegate access to all of your previously created items of that type.
11. In the **Do Inbox Tasks On My Behalf** field, select whether you are delegating for All Business Processes, or click on the **Prompt** button next to **For Business Process** and navigate through the drop-down menus to choose the business processes from the menu for which you would like the Delegate to review/approve on your behalf. You can also select **None of the Above**, and only allow your Delegate to initiate tasks on your behalf, and not review/approve
12. If you would also like tasks to remain in your own Inbox as well as being available to your Delegate, check the **Retain Access to Delegated Tasks in Inbox** box

When all fields are complete, click **Submit** at the bottom of the page.

The following fields should be entered as part of this process:

Field	Explanation
Begin Date	Enter the date that you will be allowing a Delegate to begin acting on your behalf.
End Date	Enter the date that the Delegate will cease acting on your behalf.
Delegate	Select the person(s) to whom you would like to Delegate your work.

Field	Explanation
Start On My Behalf	Select the business processes that you would like to allow your Delegate to initiate on your behalf, or leave blank.
Do Inbox Tasks On My Behalf	Select For All Business Processes, select For Business Processes from the prompt, or none of the above.
Retain Access to Delegated Tasks in Inbox	Check if you would like to continue having access to tasks in your inbox while your Delegate is acting on your behalf.

To Cancel or Modify the Delegation:

Once you submit the delegation you can cancel or modify it. The way you proceed depends on whether your manager has already approved your delegation or not.

If the Delegation is Approved:

For approved delegations, you can modify the dates, tasks, and other information, and you can add new delegates or remove delegates

1. Click **View profile**
2. Select the **Actions** 
3. Hover over the **Business Process** hyperlink
4. Click on **My Delegations**
5. On the My Delegations page, click the **Manage Delegations**  button to access the Manage Delegation page. Make modifications to the available fields as needed.
**Please Note: If you need to completely delete the deletion, send an email to Workday@henryschein.com*
6. Click **Submit**  at the bottom of the page

If the Delegation is Not Approved:

1. Click **View Profile**
2. Select the **Actions** 
3. Hover over the **Business Process** hyperlink
4. Click on **My Delegations**
5. On the My Delegations page, click the **Manage Delegations**  button to access the Manage Delegation page.
6. Click the **Delegation History** tab, and you will see the delegation that you started, it will still be in progress
7. Click the **Actions**  button for the **Delegation Action** that is "In Progress"
8. Highlight the **Business Process** option and click **Cancel**
9. Enter a **Comment**
10. Click **Submit**  at the bottom of the page
Please Note: You can also access this via the **Archive tab of your **Inbox** by clicking on the Delegation event. Select the **Actions**  button to the right of the delegation request, highlight the **Business Process** option, and click **Cancel***