



# Workday Tip #3

## Manager – Request a Delegation

**All Employees – 8/5/22**

**Human Resources Division**

## Workday Tip #3 – Manager – Request/Receive a Delegation

See: HRMS Training & Resources @

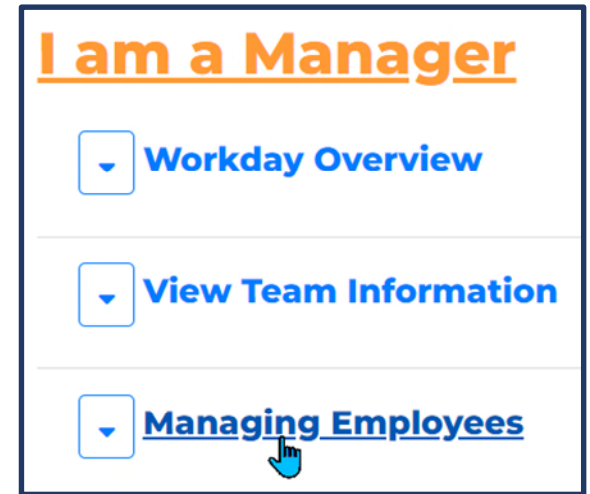
<https://hrms.suffolkcountyny.gov/Training-Resources>

1. On the **HRMS Training & Resources** web page – scroll down to **I am a Manager**

2. Click on *topic* **Managing Employees**

3. Under Contents choose either item #6. **Requesting a Delegation**, and/or

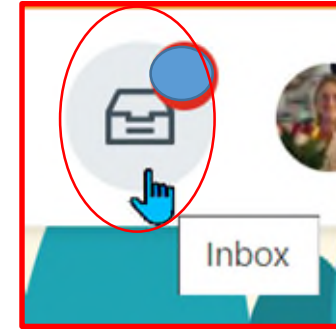
4. Item #7. **Receive a Delegation Assignment**



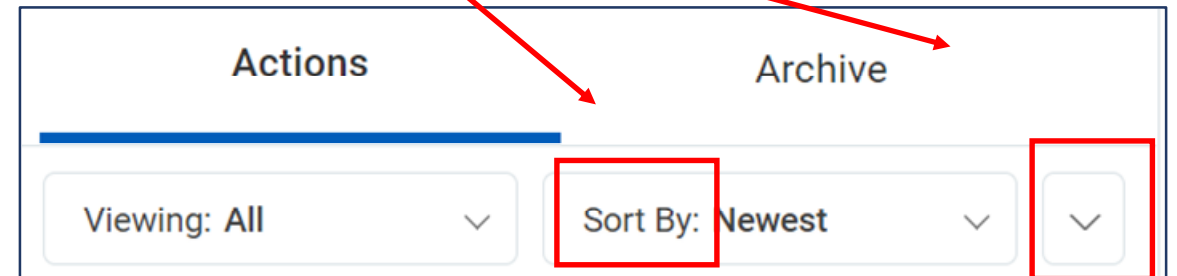
# Demonstration: Steps Manager follows to set up & Request Delegation:

**NOTE:** For *Receiving* a Delegation demonstration – go to <https://hrms.suffolkcountyny.gov/Training-Resources>

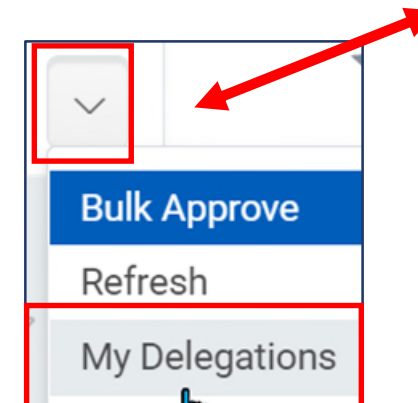
1. On Workday Home Page click on **Workday Inbox**



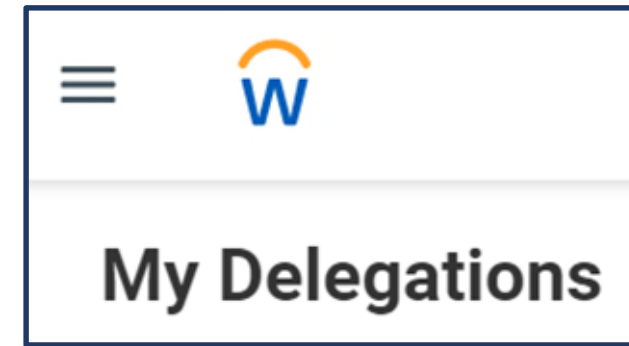
2. To the *right* of “**Sort By**” options dropdown is a **box** with a downward pointing arrow – click on the arrow



3. Click on **My Delegations**



4. Under My Delegations . . .



5. Scroll down and click on **Manage Delegations** button (\* indicates required information)



The following page appears:



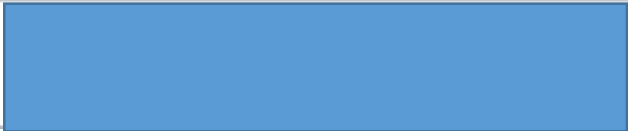

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
+	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="radio"/> For all Business Processes <input type="radio"/> For Business Process <input type="text"/> <input checked="" type="radio"/> None of the above

6. Enter the start date of delegation in the **\*Begin Date** field

7. Enter end date of delegation in the **End Date** field

8. Select the person or persons you are delegating to from the list provided in the **\*Delegate** field

The screenshot shows a 'New Delegation' form with the following fields:

+	*Begin Date	End Date	*Delegate
-	08/08/2022 	08/09/2022 	 

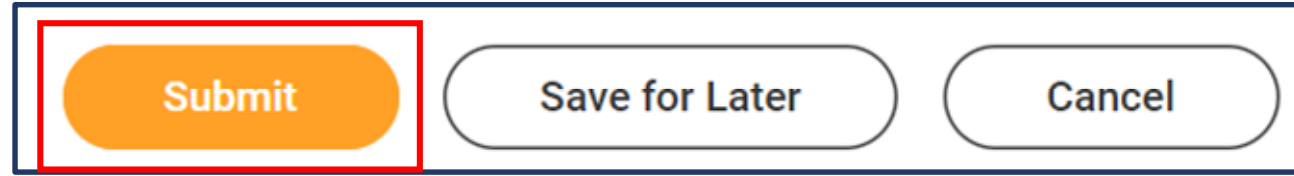
9. In the **Start On My Behalf** field – identify the **Business Process** the delegate to start on your behalf, ex. **Request Absence**

10. The last section - **Do Inbox Tasks On My Behalf**, deals with the tasks listed in your Inbox generated by business processes.

The screenshot shows a settings interface for delegation. At the top, there are two sections: "Start On My Behalf" and "Do Inbox Tasks On My Behalf". Under "Start On My Behalf", there is a dropdown menu currently showing "Request Absence". Under "Do Inbox Tasks On My Behalf", there are three radio button options: "For all Business Processes" (selected), "For Business Process" (with an empty dropdown menu), and "None of the above". At the bottom right, there is a checkbox labeled "Retain Access to Delegated Tasks in Inbox" which is checked. Red arrows and boxes highlight these key elements: the "Start On My Behalf" header, the "Request Absence" dropdown, the "Do Inbox Tasks On My Behalf" header, the radio button options, and the checked "Retain Access to Delegated Tasks in Inbox" checkbox.

11. Recommended to check **Retain Access to Delegated Tasks in Inbox** box - to retain the ability to complete your tasks. This will cause delegated tasks to be sent to your Inbox as well as the designated delegate(s).

**12. Click Submit**



**NOTE:** The delegation request will route to your manager for approval.

\* \* \*