MC MONTGOMERY COLLEGE

Delegate Task
Workday Job Aid for Employees

Overview

This job aid explains how to delegate tasks in Workday. Setting up a delegation is the handover of your authority to approve tasks in Workday while you are away. Delegations are permitted for a specific set of circumstances only. Additionally, it is advised to have a conversation with the chosen delegate about the delegation. If you will be out of the office for Time Off or for extended leave of absence, you can delegate your Workday My Tasks to a peer or superior within the organization.

**Important:** You can only enter current or future dated effective dates when delegating tasks.

Workday Activities	Can I Delegate?
Day to day approvals (Workday My Tasks) **when I am on a period of Absence (Time Off or Leave)**	Yes
Day to day approvals (Workday My Tasks) **when I am at work**	No
Initiation of Business Processes on your behalf	Yes

Delegate Task

1. Click on your Workday **My Tasks** in the upper right corner.

2. On the left side panel, click on the **Manage Delegations.**
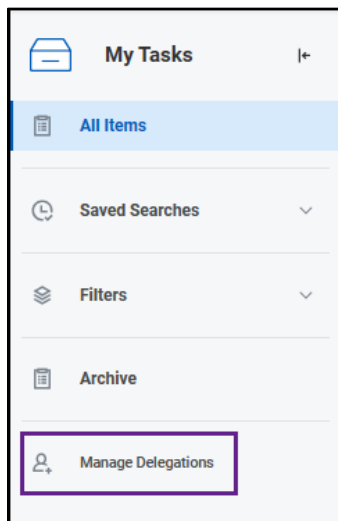
3. The **My Delegations** screen displays. Click **Manage Delegations.**

4. The **Manage Delegations** screen displays.

5. Enter the following details:

   - **Begin Date:** Enter the start date for the delegation. This field is required.

   - **End Date:** Enter the end date for the delegation. This field is not required.

     Note: Delegations should last only for the period that you are unable to act in the system (i.e., period of Time Off or extended leave).

   - **Delegate:** Search for and select a proposed delegate. You are encouraged to discuss delegations prior to entering this information in the system. Delegations should be limited where possible to those activities that are necessary during your period of absence (i.e., Time Entry and Time Off approvals).

   - **Use Default Alternate Delegate:** This box auto-selects to the manager of the Alternate Delegate. If this is not

appropriate, unselect the box and enter the applicable Alternate Delegate.

- **Start On My Behalf:** Select the business processes you wish to delegate initiation for.

- **Manage My Tasks on My Behalf:** Select one of the following options:

    o **For All Business Processes:** If selected, this will delegate all My Tasks, including reviews and approvals, to the delegate. After selecting this option, you can select the Retain Access to Delegated Tasks in My Tasks checkbox if you wish to retain access to your My Tasks during the delegation period.

    o **For Business Process:** If selected, this will delegate a select business process to the chosen delegate.

    o **None of the Above:** If selected, the chosen delegate will have no tasks assigned to them.

- **Enter your Comment:** Enter a relevant comment, if applicable.

- **Attachments:** Drag-and-drop or click **Select files** to upload a relevant attachment, if applicable.

- Click **Submit.**

    Note: The delegation of the selected My Tasks to the chosen delegate will start on the Begin Date