

## 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 Inbox to a peer or superior within the organization. If you are out of office unexpectedly, then your Manager can set up delegations on your behalf.

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

Workday Activities	Can I Delegate?
Day to day approvals (Workday Inbox) <b><u>when I am on a period of Absence (Time Off or Leave)</u></b>	Yes
Day to day approvals (Workday Inbox) <b><u>when I am at work</u></b>	No
Initiation of Business Processes on your behalf	Yes, only for the following processes: <ul style="list-style-type: none"> <li>• Create Expense Report</li> <li>• Create Spend Authorization</li> <li>• Manage Payment Elections</li> </ul>

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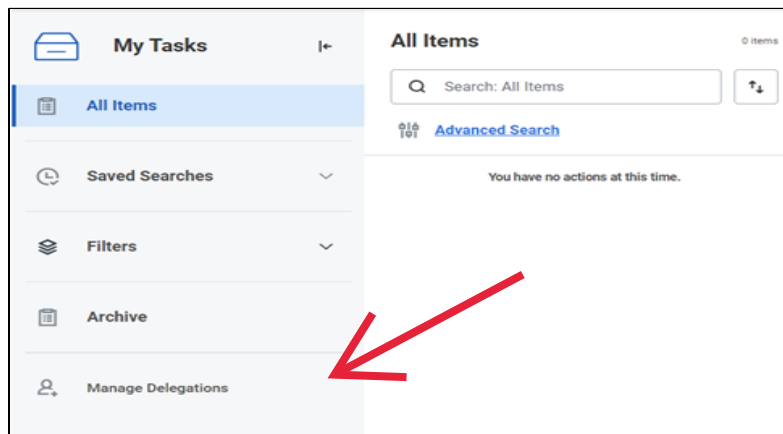
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1. Click on your Workday **My Tasks**.



2. In the My Tasks section, click **Manage Delegations**



3. 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.
- **Do Inbox Tasks On My Behalf:** Select one of the following options:
  - **For All Business Processes:** If selected, this will delegate all inbox tasks, including reviews and approvals, to the delegate. After selecting this option, you can select the **Retain Access to Delegated Tasks in Inbox** checkbox if you wish to retain access to your inbox during the delegation period.
  - **For Business Process:** If selected, this will delegate a

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select business process to the chosen delegate.

- **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.

#### 4. Click **Submit**.

**Note:** The delegation of the selected Inbox tasks to the chosen delegate will start on the Begin Date.