Delegate Workday Transactions Overview

This Quick Reference Guide (QRG) is designed to walk employees through the delegation process in Workday. By the end of this QRG, you will be able to delegate Workday transactions, manage your delegations, and access transactions delegated to you. Delegations are temporary reassignments of tasks to another person, enabling them to perform actions on your behalf. The delegation may pertain to initiating processes, approving transactions, or delegating specific actions to someone.

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Set Up Delegations

On the Workday Home screen:

1. Type My Delegations in the search field.
2. Select the My Delegations report from the Search Results.

On My Delegations screen:

3. Click the Manage Delegations button.
On the second **My Delegations** screen:

4. Complete the following required fields:
   - **Begin Date** – enter the start date of delegation.
   - **End Date** – enter the end date of delegation.
   - **Delegate** - enter and select the name of the employee to whom you want to delegate the business process.

   Leave **Use Default Alternate** box checked.

   - **Start On My Behalf** - search the **Business Process** you want the delegate to **initiate** on your behalf. Select all the applicable Business Processes.

   You may click **Business Processes allowed for Delegation** to see the complete list of business processes allowed for delegation.

   - **Do Inbox Tasks On My Behalf** – select the **For all Business Processes** option if you want the delegate to have **approval authority** for all tasks you may receive. For specific business processes, select the **For Business Process** option and choose the task for which you want the delegate to have approval authority.
4. Click the **Submit** button at the bottom of the screen.

You have successfully completed this task. It will now be routed based on the configuration.

5. **NOTE** If you are the Manager of someone who has submitted a delegation, it will come to you for approval. If you create and submit a delegation, it will route to your manager for approval.

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**Access/Manage Existing Delegations**

**On the Workday Home screen:**

1. Repeat Steps 1 – 3 in the **Set Up Delegations** section.

**On the Manage Delegations screen:**

2. If you have existing Delegates you would like to change, update the following fields:
   - **Begin Date** – if needed, change the existing start date of delegation
   - **End Date** – if needed, change the existing end date of delegation.
   - **Delegate** – click the X icon to remove the current delegate. Then enter and select the name of the employee you want to be your new delegate.
   - **Alternate Delegate** – confirm the alternate delegate is correct. If you need to change this existing alternate delegate, uncheck the **Use Default Alternate** checkbox. Then click the X icon to remove the alternate delegate and enter the name of the new alternate delegate.
- **Start On My Behalf** – if needed, change the business process you want to delegate. Click the X icon to remove the business process and search for the new business process.
- **Do Inbox Tasks On My Behalf** – if needed, change the specific business processes for which you want to delegate approval authority. Click the X icon to remove the business process and search for the new business process you want to delegate.

3. Click the **Submit** button at the bottom of the screen.

**Access Delegated Tasks**

On the Workday **Home** screen:

1. Select your Picture in the upper right-hand corner of the screen and select **Switch Accounts**.

2. Under **Switch Account** select the **Name** of the profile for whom you are performing a delegated task.

3. Your **Delegation Dashboard** will appear, from there select which task you would like to initiate on behalf of the delegator. You can also navigate to the Workday Inbox to initiate the tasks delegated to you.

4. After performing or approving the delegated tasks, repeat Step 1 to switch back to your account.