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 and set up a delegate for initiating expense reports. You will also be able to manage existing delegations, view 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.

You can also access My Delegations from your Inbox.

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.

   **NOTE**
   You cannot delegate a task for over a year. The only exception is **Create Expense Report** that you can allow a delegate to start on your behalf. For steps on how to set up a delegate for initiating expense reports refer to the Set up a Delegate for Initiating Expense Reports in this QRG.

   • **Delegate** - enter and select the name of the employee to whom you want to delegate the business process.
   • **Use Default Alternate** – leave this box checked.
     - If you receive a message to uncheck this box, clear the Use Default Alternate check box and enter the name of the new alternate delegate. This may occur if you are set up as an alternate delegate for the delegate you selected.
   • **Start On My Behalf** - search the **Business Process** you want the delegate to **initiate** on your behalf. Select all the applicable Business Processes.

   **NOTE**
   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.

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5. Click the Submit button at the bottom of the screen.

You have successfully completed this task. If you delegated an inbox task for an employee to do on your behalf, it will route to your manager for approval. If you are the Manager of someone who has submitted a delegation for inbox tasks, it will come to you for approval.

### Set up a Delegate for Initiating Expense Reports

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** – search for and select the person who will be the delegate.
   - **Alternate Delegate** – will auto-select the delegate’s primary manager. Clear the Use Default Alternate check box to select a different alternate delegate.

5. In the Start On My Behalf field, click the field and select All.
6. From the drop-down list, select:
- Create Expense Report
- Create Spend Authorization (optionally)

7. Click **Submit**.

The **Do Inbox Tasks on My Behalf** field can remain as **None of the above**. Delegation of your Inbox tasks is **not** needed to assign a delegate to create expense reports on your behalf.

Also, you can assign a delegate to create expense reports on your behalf for longer than one year. However, inbox tasks cannot be delegated for over one year; therefore, if you include inbox tasks in the assignment, it will be subject to the one year limitation.

You have successfully completed this task. If you select Create Expense Report only, the assignment is immediate and does not require approval.
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.

You have successfully completed this task.
View My Delegations

The View My Delegations report shows you the individuals you have assigned to act as a delegate on your behalf.

On the **Workday Home** screen:

1. Type **View My Delegations** in the **Search** field and select **View My Delegation Assignments**.

On **My Delegations** screen:

2. In the **Current Delegations** tab, your current delegates display.

You have successfully completed this task.

View My Delegation Assignments

The View My Delegation Assignments report shows you the individuals you are acting as a delegate.

On the **Workday Home** screen:

1. Type **View My Delegations** in the **Search** field and select **View My Delegation Assignments**.

On **View My Delegation Assignments** screen:

2. Your current delegation assignments display.
You have successfully completed this task.

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.

You have successfully completed this task.