

Workday: How to Delegate Tasks

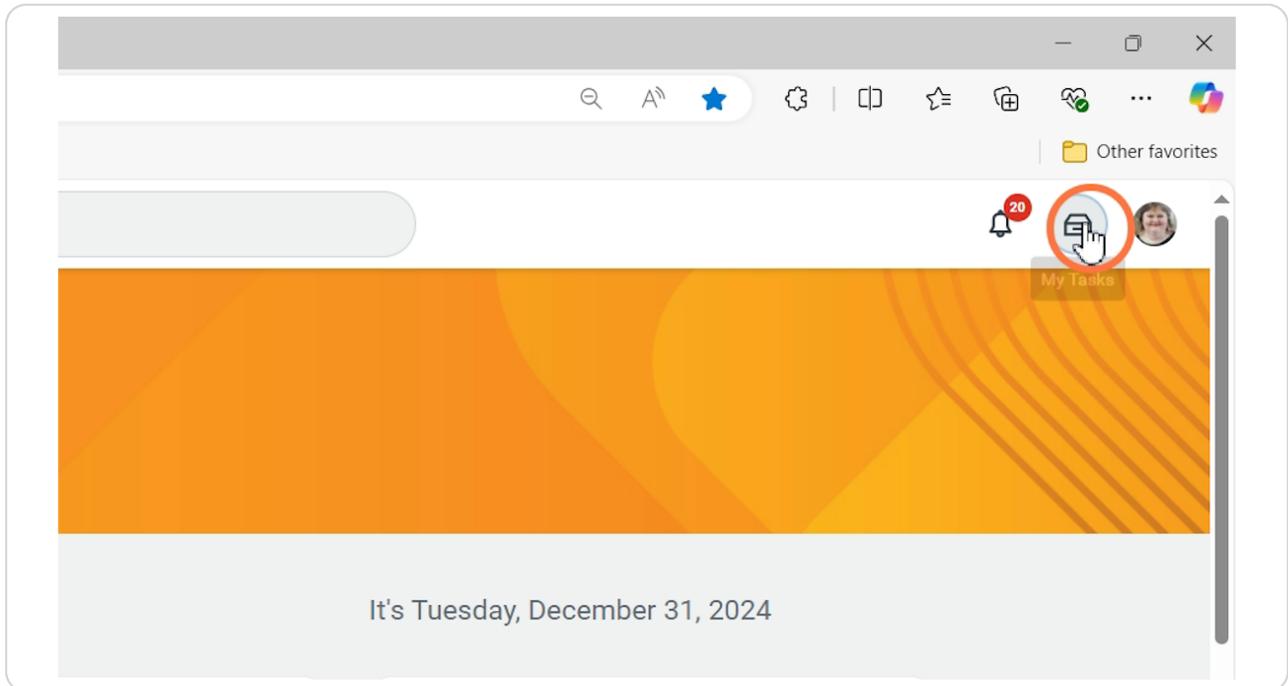
If you're going to be out of the office or take a leave and need to assign backup, you can delegate your business process tasks to someone in your absence. Alternatively, if you have someone who routinely approves PTO or manages timecards for your department, you can delegate these tasks indefinitely.

12 Steps [View most recent version](#) 

Created by	Creation Date	Last Updated
Alex Drabik	Dec 31, 2024	Dec 31, 2024

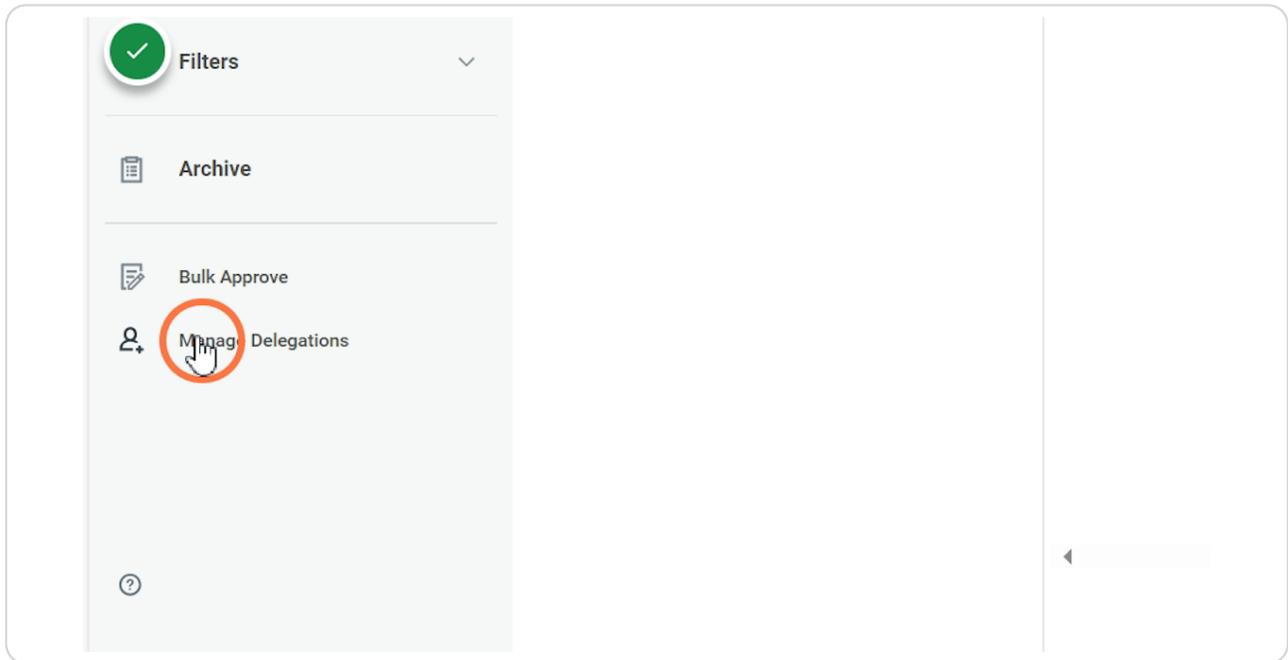
STEP 1

Open My Tasks



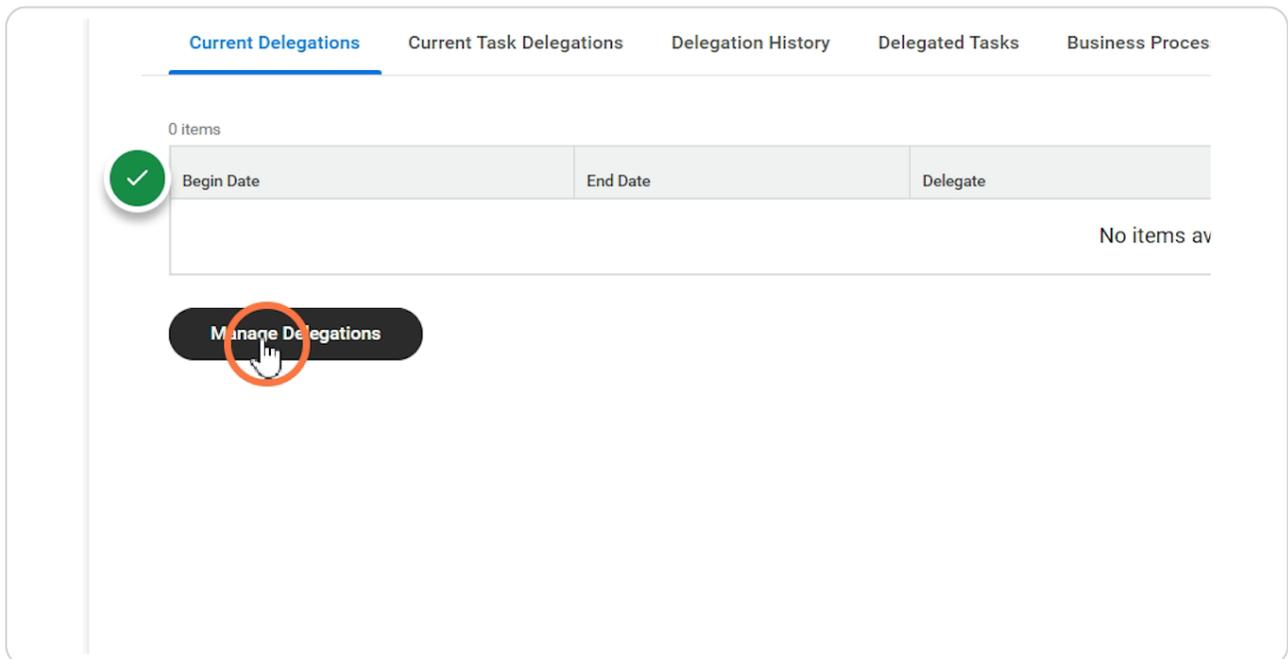
STEP 2

Choose Manage Delegations



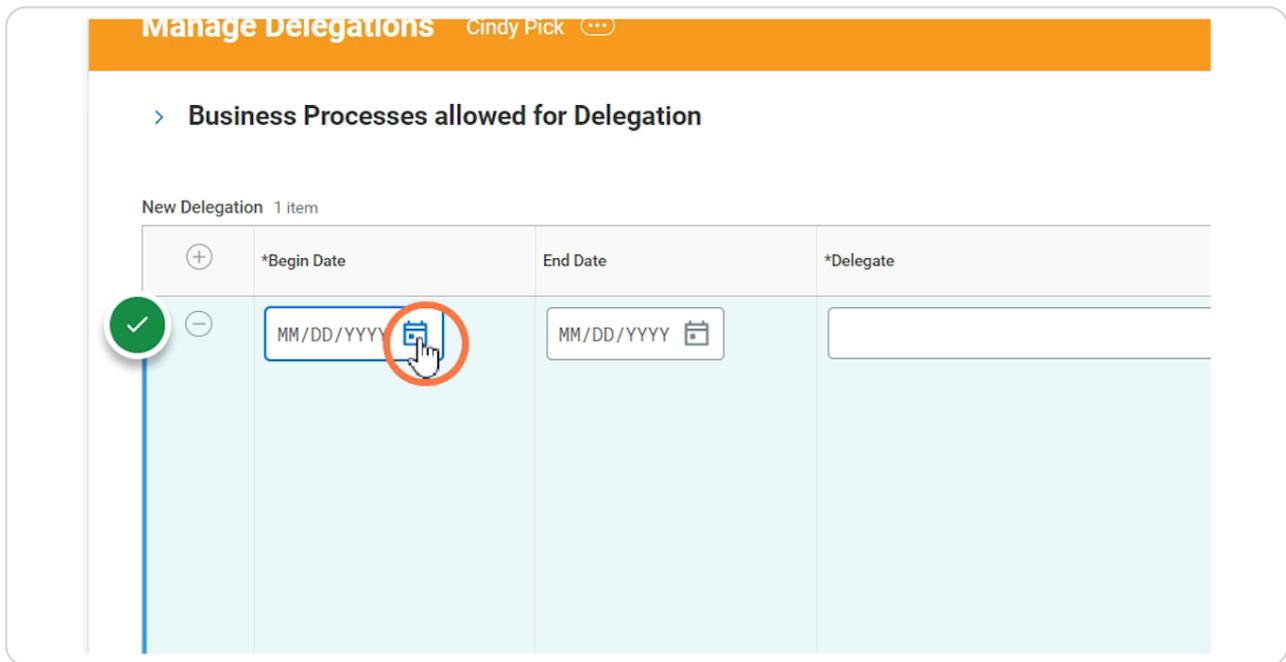
STEP 3

Initiate New or Manage Existing Delegations



STEP 4

Begin Date - must be current date or later.



Manage Delegations Cindy Pick

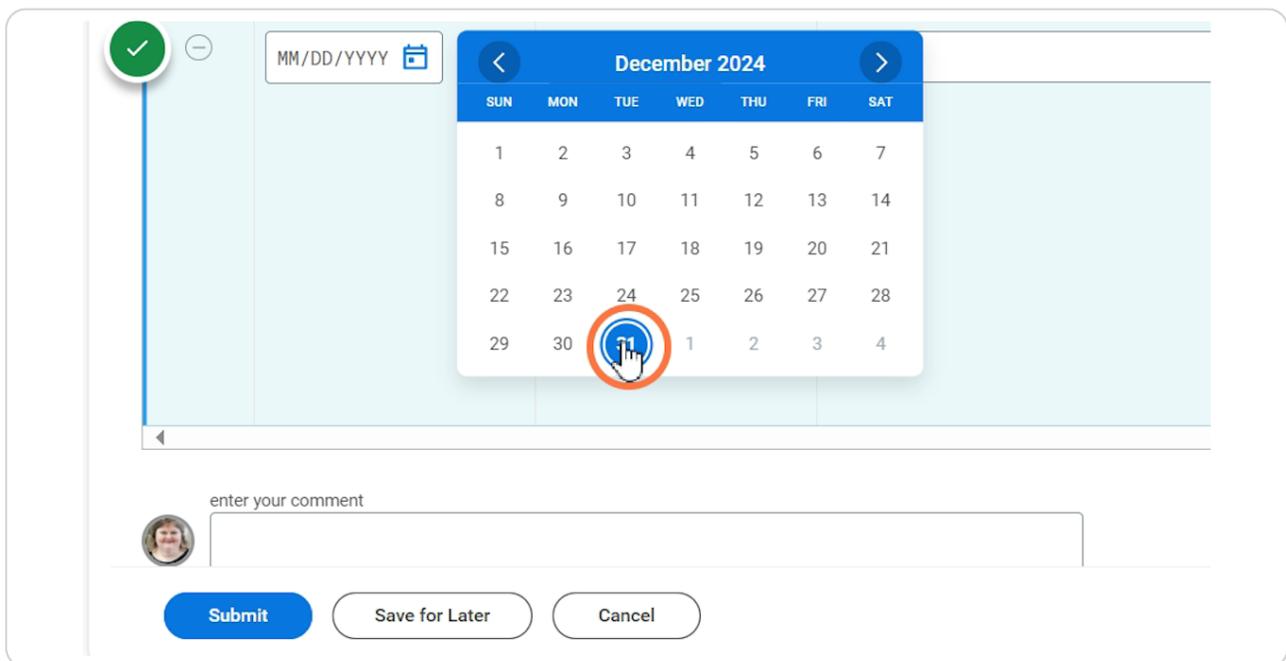
> **Business Processes allowed for Delegation**

New Delegation 1 item

	*Begin Date	End Date	*Delegate
<input checked="" type="checkbox"/>	MM/DD/YYYY 	MM/DD/YYYY 	

STEP 5

Click here



MM/DD/YYYY 

December 2024

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

enter your comment



Submit Save for Later Cancel

STEP 6

End Date- - required, but can be far into the future.

The screenshot shows a web interface titled "Manage Delegations" with the user name "Cindy Pick" and a menu icon. Below the title is a section header "Business Processes allowed for Delegation". Underneath, it says "New Delegation 1 item". A table is displayed with the following columns: a control column with a plus sign (+) and a minus sign (-), a "*Begin Date" column containing "12/31/2024" and a calendar icon, an "End Date" column containing "MM/DD/YYYY" and a calendar icon, and a "*Delegate" column which is currently empty. A green checkmark in a circle is positioned to the left of the table, with a blue vertical line extending downwards from it.

	*Begin Date	End Date	*Delegate
	12/31/2024	MM/DD/YYYY	

STEP 7

Delegate - Search for the name of the person you want to delegate your tasks to.

IS Cindy Pick ⋮

is allowed for Delegation

	End Date	*Delegate	Start On My Behalf
	12/12/2050 	Search <input type="text" value="I"/> 	

STEP 8

Start on my behalf - what do you initiate?

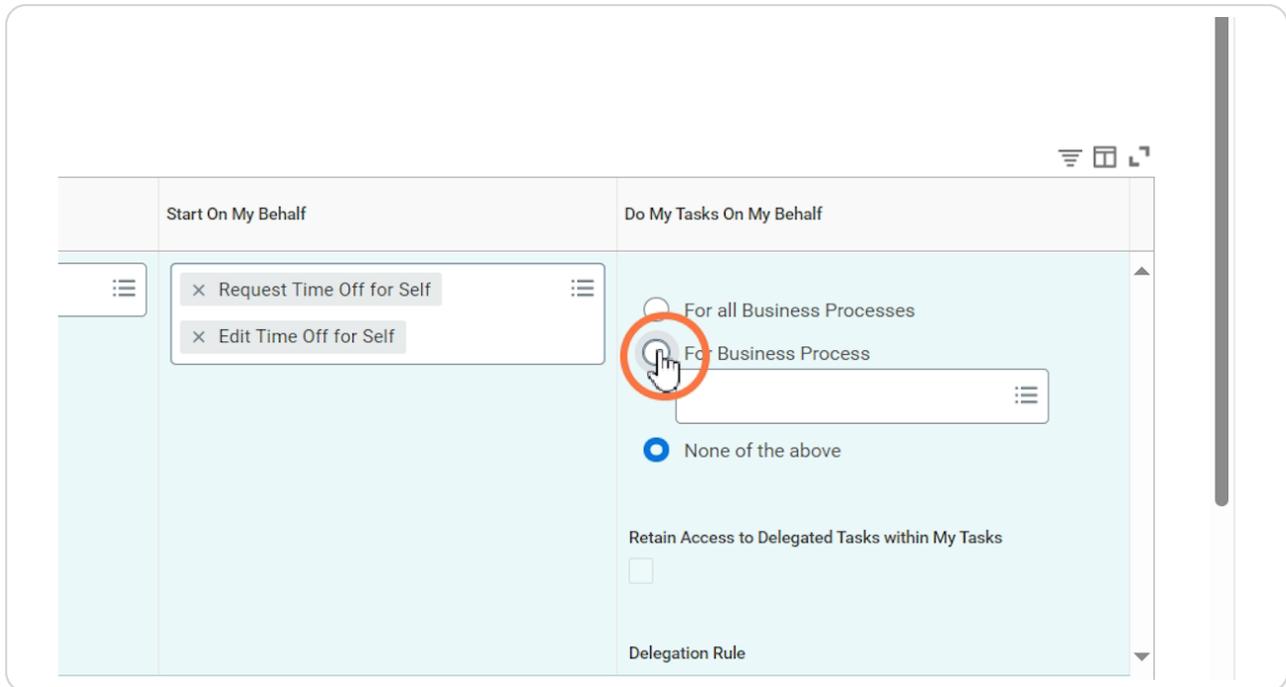
Typically, you would initiate processes for yourself or your direct reports. For example, Search "time" and select - Request Time Off for Self, Request Time Off for Worker, Edit Time Off for Self, Edit Time Off for Worker.

Delegate	Start On My Behalf	Do My Tasks On My Behalf
<p>✕ Sam Mueller ⋮</p>	<p>Search</p>	<p><input type="radio"/> For all Business P</p> <p><input type="radio"/> For Business Proc</p> <p><input checked="" type="radio"/> None of the above</p> <p>Retain Access to Delegated <input type="checkbox"/></p>

STEP 9

Do My Tasks On My Behalf

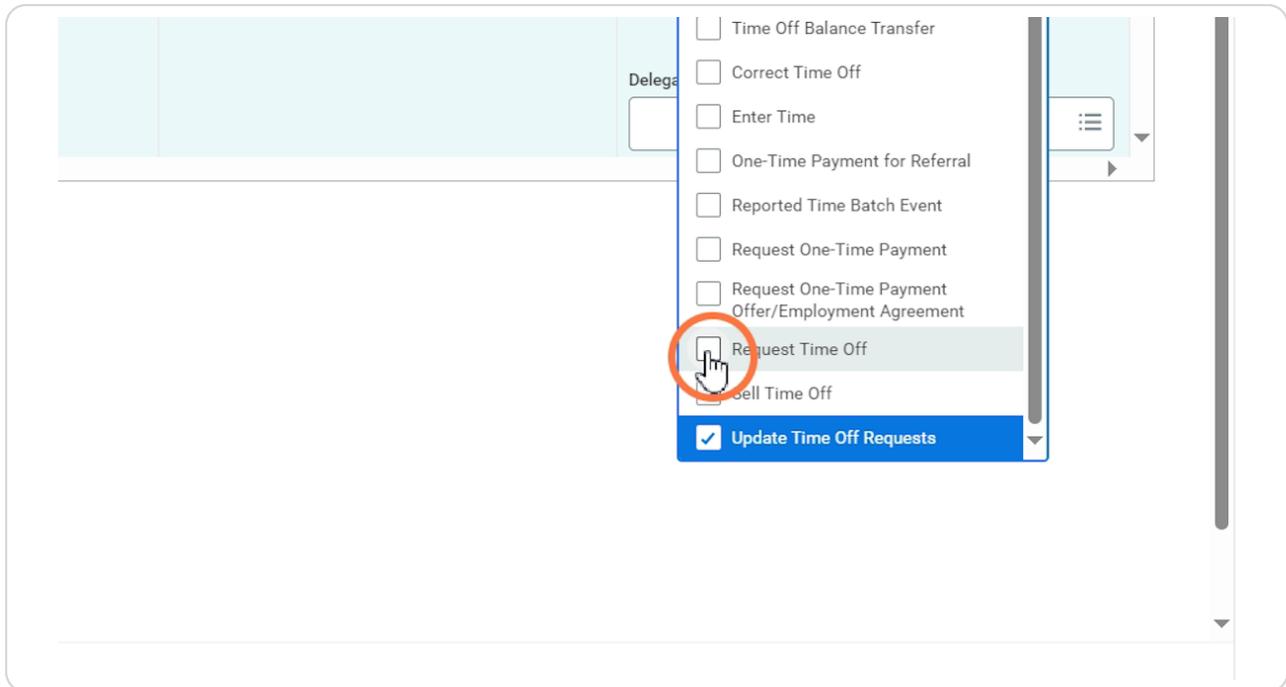
Typically, these are for requests and approvals. You can select ALL Business Processes or search for specific processes to delegate.



STEP 10

Business Process Example: PTO and Timecard Delegation

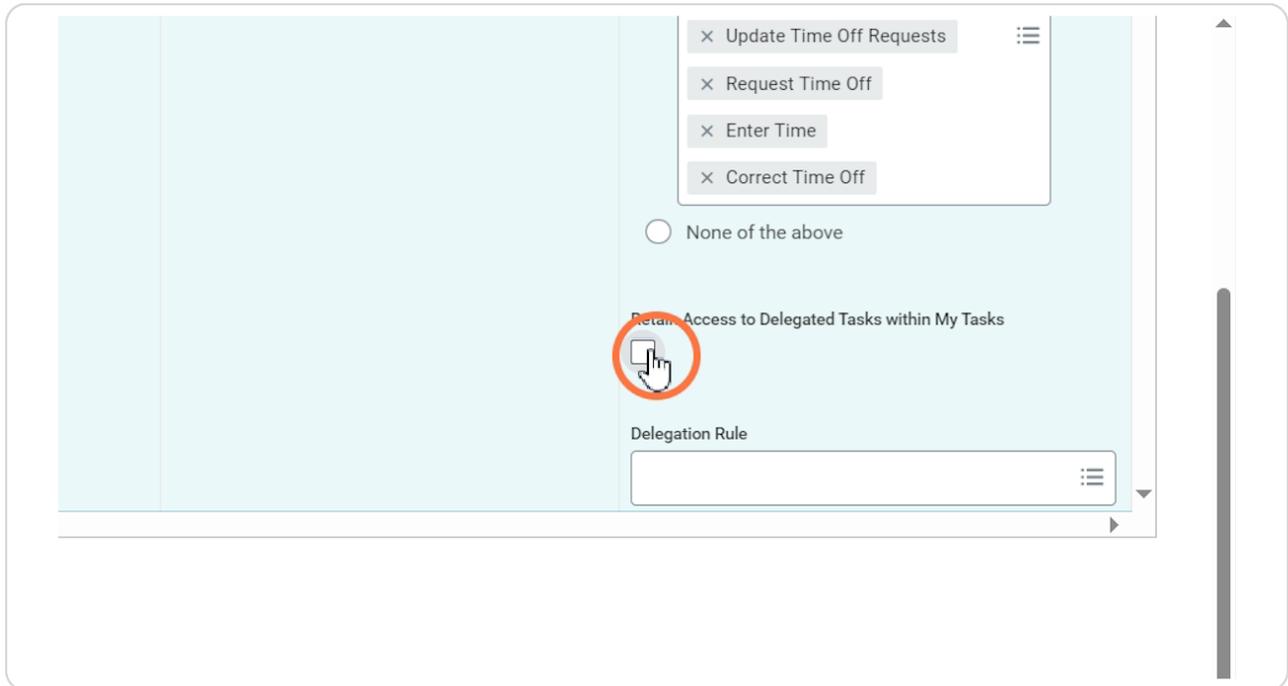
To delegate PTO and Timecard initiation, management, and approval, Select: Update Time Off Requests, Request Time Off, Correct Time Off, and Enter Time.



STEP 11

Retain Access - Delegate, but also keep your access.

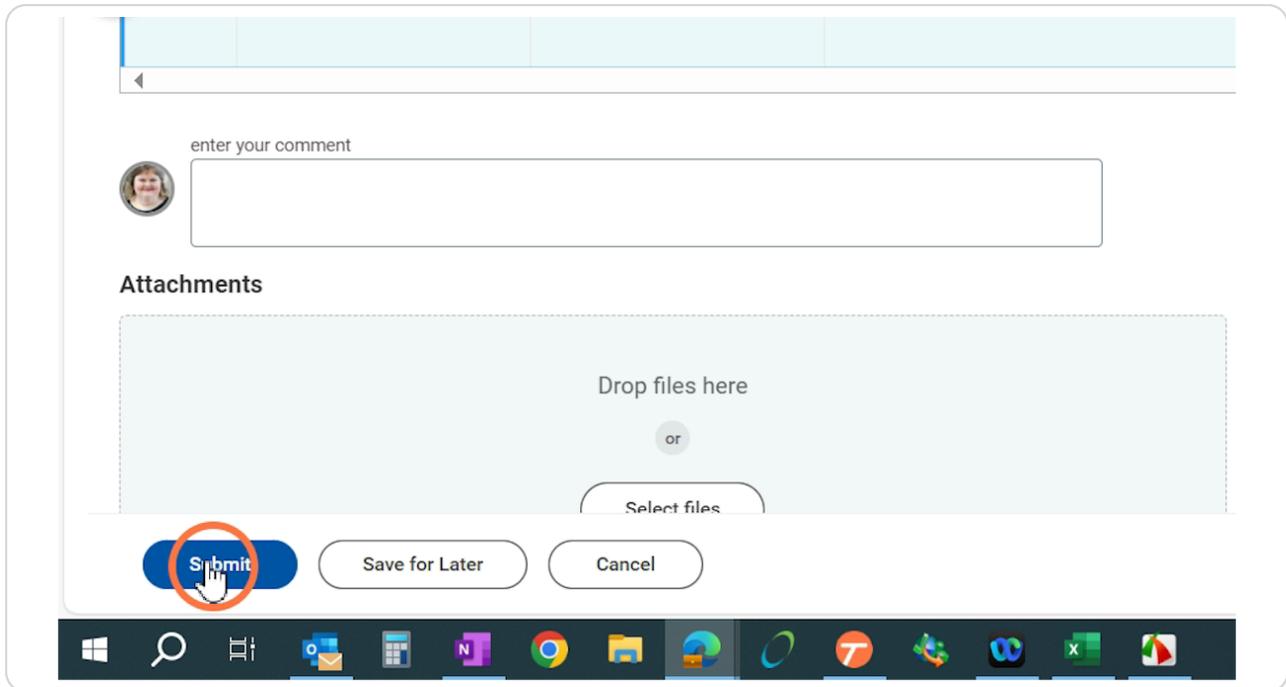
Defaults to checked = keep your access.



STEP 12

Submit

This goes to the supervisor of the person you are delegating to. You can add a comment to explain why you are delegating to them if needed.



The screenshot shows a web interface for submitting a delegation. At the top, there is a light blue header bar. Below it is a comment input field with the placeholder text "enter your comment" and a small profile picture of a woman to the left. Below the comment field is an "Attachments" section with a dashed border and the text "Drop files here" and "or" above a "Select files" button. At the bottom of the interface, there is a dark blue bar with three buttons: "Submit" (circled in orange), "Save for Later", and "Cancel". Below the interface is a Windows taskbar with various application icons.