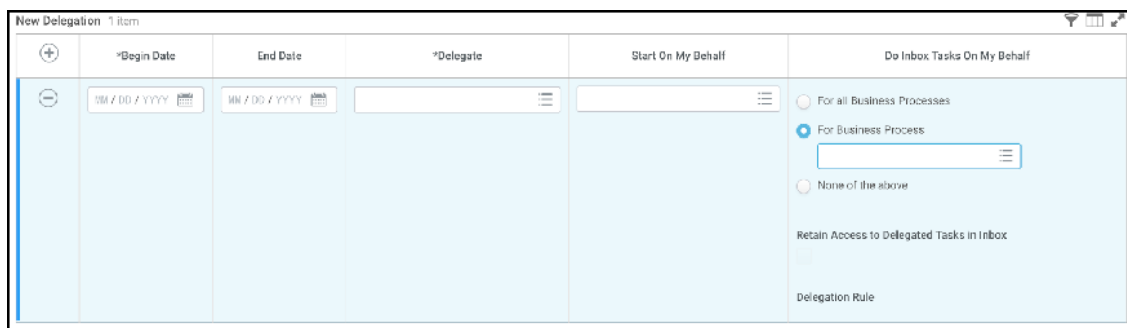# DELEGATING TASKS IN WORKDAY

Purpose: Delegate the initiating of some tasks on your behalf or specific tasks from your inbox, for a specified period of time. All requests to delegate will go through an approval process.

Helpful Hints Delegations of approval tasks should only be used only when you will be unavailable to complete time-sensitive tasks. In boxes will contain HR related tasks as well that may contain salary or other personal information. Delegating your entire inbox should be done only when you will unavailable for an extended period of time, and be delegated to a person (peer or superior) who already has access to the same information you do.

1. Search for **"My Delegations"** and select task

   - View the Current Delegations tab to view existing delegations.

   - Click the **Manage Delegations** button.

2. Choose **Begin Date** and **End Date** (Note: End date is required)

3. Choose the name of the **Delegate**, the person to whom you are delegating the tasks.

   - **Start On My Behalf**

     o Choose the task you'd like them to start, (i.e. Create Expense Report). Add a line for each task you want the delegate to be able to start on your behalf.

- **Do Inbox Tasks On My Behalf**
  - Choose the Business Processes you'd like them to be able to act on from your inbox, (i.e. Expense Report Event).
  - You can add additional tasks in the **For Business Process** field for each task you want the delegate to be able to act on in your inbox.
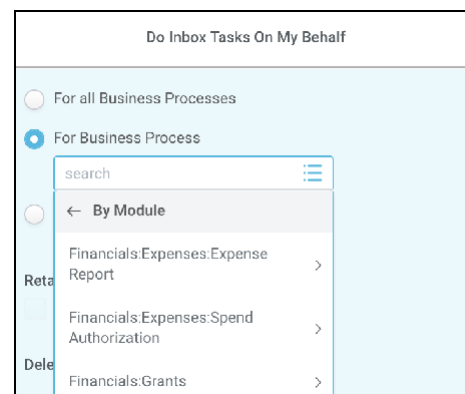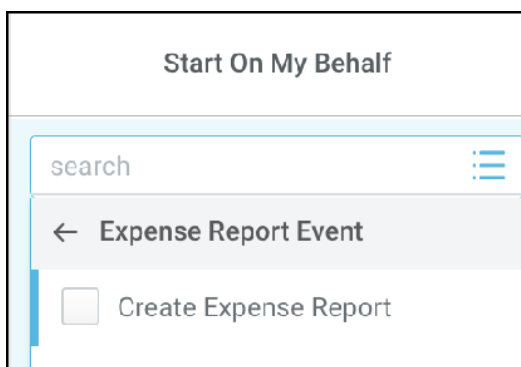
4. Click **Submit**

5. The request to delegate will have to be approved before it goes into effect. All requests to delegate to peers, subordinates or superiors will send an approval request to your manager.

6. Financial Operations will be monitoring delegation of approval tasks.