



Workday Finance, configured by a Chartered Accountant.

ABHAYJAISWAL.COM

■ WORKDAY FINANCE · STEP BY STEP

Delegate

■ Table of Contents

1. [Purpose](#)
2. [Prerequisites](#)
3. [Delegate a Task](#)
4. [View Delegated Tasks](#)
5. [Perform Delegated Tasks](#)
6. [Common Errors and Resolutions](#)
7. [Best Practices](#)

■ Purpose

This guide provides step-by-step instructions for Delegating a Task in Workday. Delegating a task differs from reassigning it. Reassigning, permanently transfers a task responsibility to another users. Delegating allows temporary task performance on behalf of the original owner without transferring responsibility.

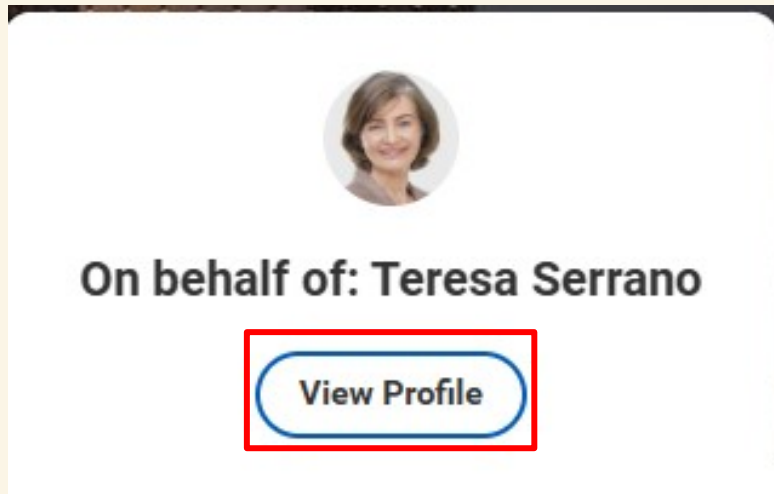
■ Prerequisites

To effectively *Delegating* ensure the following:

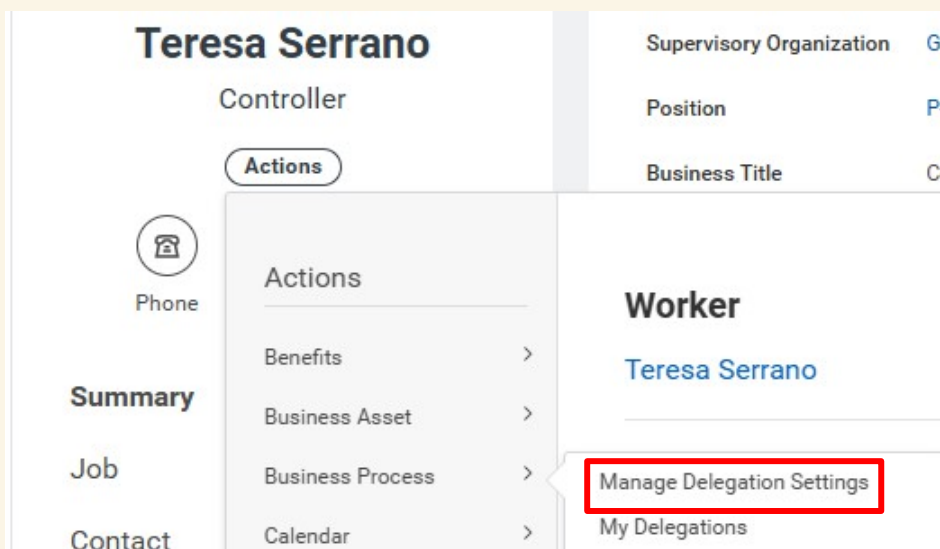
- You have the appropriate Workday Security role(s) (e.g., Business Process Administrator)
- Configure the *Users Can Delegate Task To* field in *Edit Tenant Setup - Business Process*.
- Confirm an active delegation exists with the assigned worker.

■ Delegate a Task

- Go to the user profile, View Profile.



- Actions → Business Process → Manage Delegation Settings





- From the *Current Delegations* tab, select *Manage Delegations* to assign tasks.

My Delegations

For Teresa Serrano

Current Delegations

Current Task Delegations

Delegation History

Delegated Tasks

Business Processes allowed for Delegation

1 item

Delegation	Begin Date	End Date	Delegate	Start On My Behalf	Business Processes	Retain Access to Delegated Tasks within My Tasks
...	10/09/2013		Aidan Mitzner	Create Expense Report	Expense Report Event	Yes

Manage Delegations



- To Delegate a task to a user, select ‘+’
- Populate *Begin Date, Delegate, Do My Tasks On My Behalf*.

Optional: Populate *End Date and Delegation Rule*.

Note: *Start On My Behalf* is only used when you’re delegating the initiating action of a business process.
Only check *Retain Access to Delegated Tasks* within *My Tasks* if you want the delegator to get notifications or be able to access the task from their own *My Tasks*.

Manage Delegations

Teresa Serrano

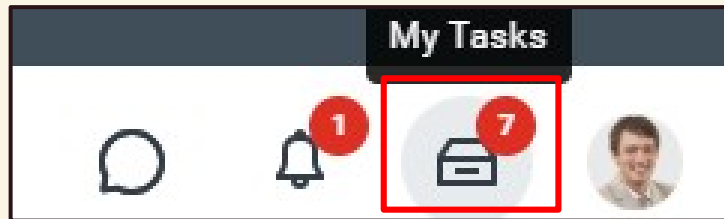
Business Processes allowed for Delegation

New Delegation 1 Item

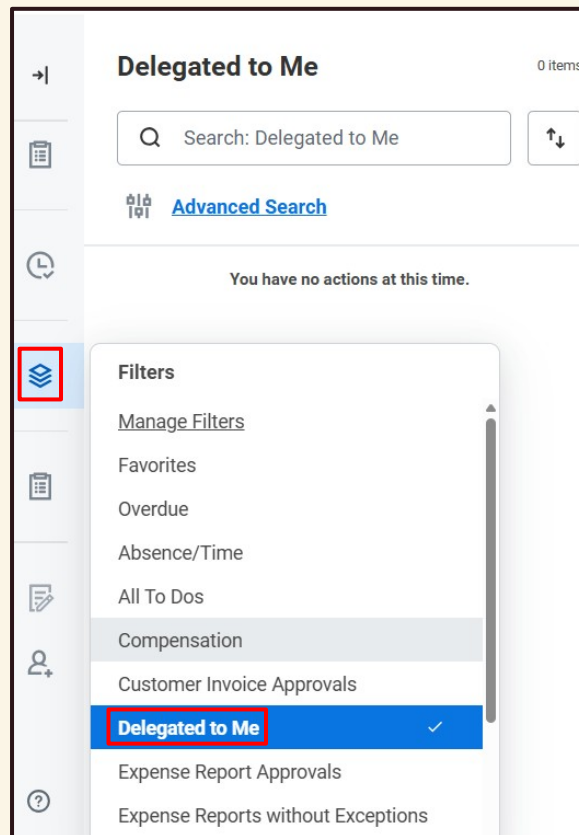
	*Begin Date	End Date	*Delegate	Start On My Behalf	Do My Tasks On My Behalf
+ -	01/19/2026		× Aidan Miltzner		☐ For all Business Processes ☒ For Business Process × Expense Report Event ☐ None of the above ☒ Retain Access to Delegated Tasks within My Tasks Delegation Rule

■ View Delegated Tasks

- Locate *My Tasks* next to user profile.



- Navigate *My Tasks > Filters > Delegated To Me*.





- The tasks labeled as ‘On Behalf Of’, indicate delegation.
- To complete the task, the assignee must switch to the delegator’s account.

Delegated to Me

1 item





[Advanced Search](#)

Open Enrollment Change: Catherine Gibson on 01/01/2025

On behalf of Catherine Gibson

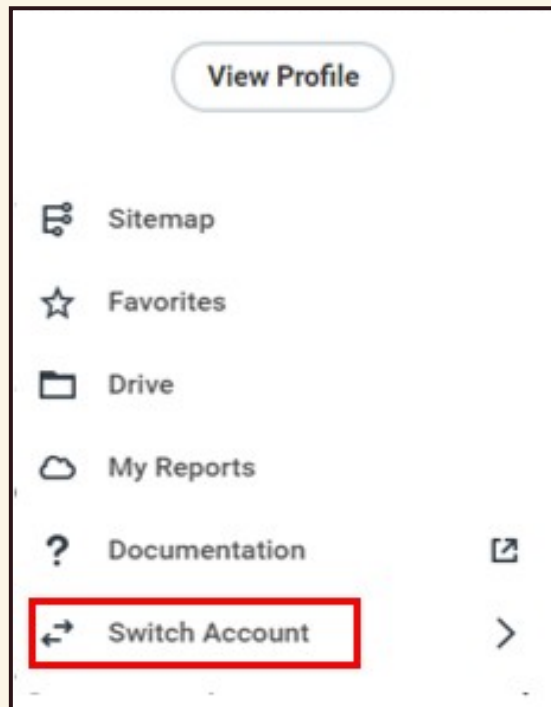
Effective: 01/01/2025

11/20/2024



■ Perform Delegated Tasks

- Select your profile picture in the top-right corner.
- Select *Switch Account* to change to the appropriate worker.



- Navigate to the *Delegation Dashboard*.

Delegated Actions	
Category	Reports & Tasks
Expenses	Create Expense Report
	Edit My Expense Transactions
	My Expense Reports
	My Expense Transactions

■ Common Errors and Resolutions

Issue	Description	Resolution
Delegated Task Not Received	Business Process Administrator must enable specific access for tasks to be delegable.	Verify the Business Process Administrator has enabled the accurate 'Users Can Delegate Tasks To'. • Anyone • Peers • Subordinates • Superiors
Unable to Perform Task	Tasks can only be completed while acting on behalf of the delegator.	Ensure you are seeing the correct worker account via the <i>Switch Account</i> option under your worker profile.

■ Best Practices

- Define Clear Timeframes. Specify a **Begin Date** and **End Date** for the delegation to ensure clarity on the duration of the task transfer. If it is for a single day, use the same date for both.
- **Limit Scope of Delegation.** Consider whether to delegate all tasks or specific items. This helps maintain control over sensitive tasks and ensures that the delegate only handles what is necessary.
- Enable the option to **retain access to delegated task** in your inbox. This allows you to monitor progress and stay informed about actions taken on your behalf.



Thank You

abhayjaiswal.com

mail@abhayjaiswal.com

[linkedin.com/in/abhaykj](https://www.linkedin.com/in/abhaykj)

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