

Delegating Approvals

This guide shows you how to delegate your Workday tasks and approvals to another person when you are unavailable. Whether you are going on leave, travelling, or need someone to cover for you, this job aid walks you through setting up, editing, and cancelling delegation rules step by step.

- Who is this for:** All Employees
- Time to complete:** 5 to 10 minutes

Before You Start

- You have an active Workday account and are logged into Workday
- You know who you want to delegate your tasks to

Types of Tasks You Will See

Task Type	What It Means
Unavailable for a short period (e.g., training)	Set up a delegation rule in advance with start and end dates
A single task in your inbox needs to be handled by someone else	Delegate that specific task directly from My Tasks
You want to cancel or change an existing delegation	Edit or end the delegation rule from My Delegations

Who should you delegate to?

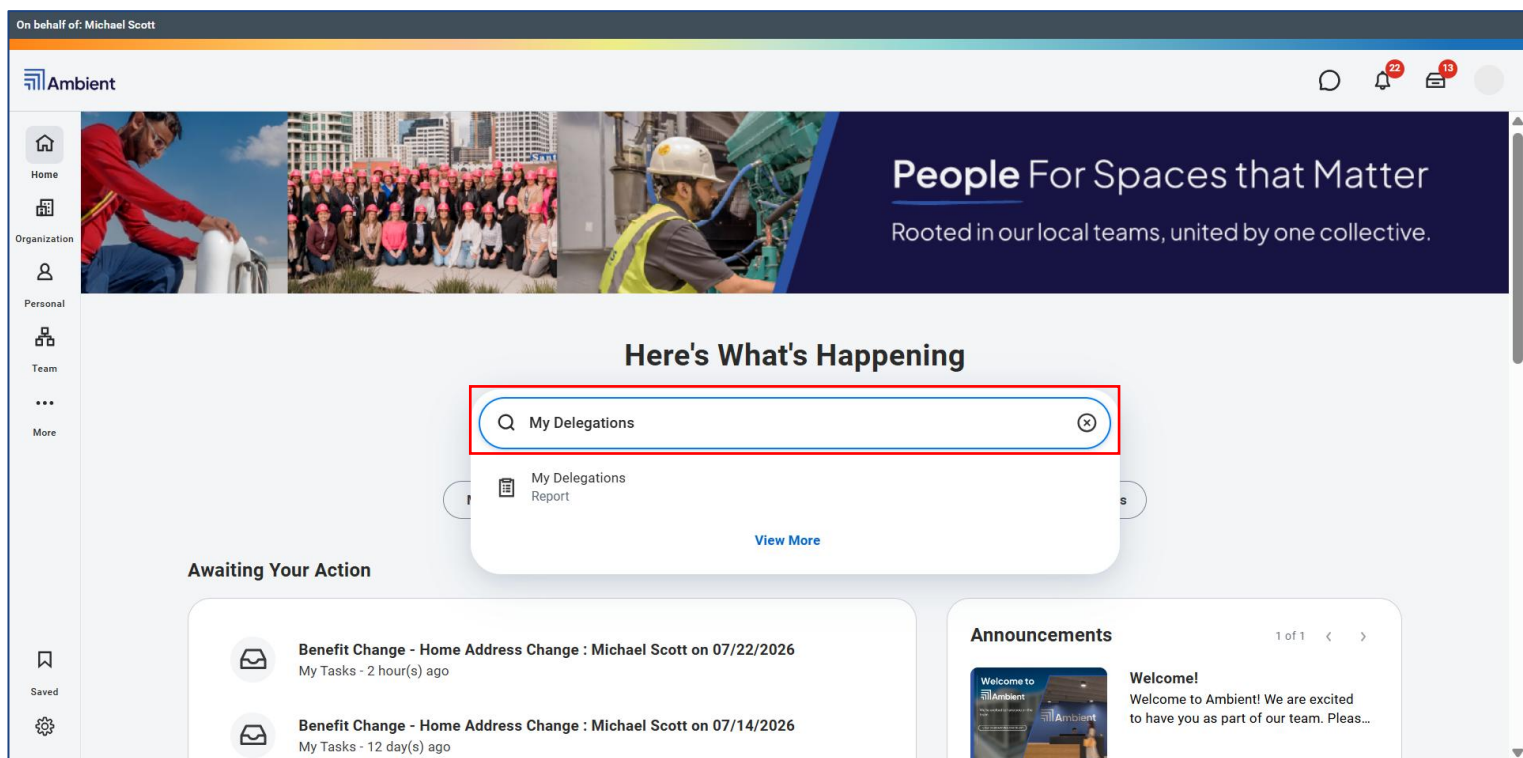
Choose the delegates very carefully. Whoever you delegate a task to, can see and act on your behalf for whatever you assign them. **Only delegate to a peer or someone senior** to you who has the authority to handle those tasks. Do not delegate to someone who isn't authorized to approve or act on the items you're handing off.

Setting Up a Delegation Rule

STEP 1:

From the Workday Homepage, access My Delegations:

1. Quick way: Click on the **search bar** at the top center of the screen, type "**My Delegations**", and select it from the dropdown results(as shown in the below screen)
2. From My Tasks: Click the **My Tasks icon** (tray icon) in the top right corner, then click **Manage Delegations** in the left panel



Setting Up a Delegation Rule

STEP 2:

Set up your delegation rule:

- Click **Manage Delegations** to create a new rule
- Select the **delegate** by searching for and selecting the person who will receive your tasks
- **Choose what to delegate:**
 - **All Business Processes:** hands off everything that can be delegated. Simplest if you'll be out entirely (e.g., on leave).
 - **Specific Business Processes:** delegates only the tasks you choose. You'll need the exact process name (for example, Change Job for job changes). If you're unsure of the name, use the search field in that box by specific **functional areas** or **all tasks**
- Set the **start date** and **end date** for the delegation period
- Click **Submit** to activate the rule

On behalf of: Michael Scott

My Delegations

Manage Delegations Michael Scott

> Business Processes allowed for Delegation

New Delegation 1 item

*Begin Date	End Date	*Delegate	Start On My Behalf	Do My Tasks On My Behalf
				☐ For all Business Processes ☐ For Business Process ☒ None of the above

Retain Access to Delegated Tasks within My Tasks

Delegation Rule

Submit Save for Later Cancel

Do My Tasks On My Behalf

☐ For all Business Processes
☒ For Business Process

Search

← All

1099 Adjustment

1099 Electronic Filing Run Event

Absence Case Event

Accept Shift Swap

Account Certification Event

Accounting Adjustment Event

Accounting Center Batch Initiation Event

Retain Access to Delegated Tasks within My Tasks

Delegation Rule

Tip: If you only want to hand off a few tasks and can't find the right process name, check with HR before choosing "For Specific Business Processes" so nothing gets missed.

Delegating a Specific Task from My Tasks

STEP 3:

If you need to delegate a single task rather than setting up a rule:

1. Open **My Tasks** and **click on the task** you want to delegate
2. Click the options icon and then the **Delegate Task**

All Items 13 items

Search: All Items

Advanced Search

Benefit Change - Home Address Change : Michael Scott on 07/22/2026 08/11/2026 ☆
Effective: 07/22/2026

Update Federal Withholdings Elections: Benefit Change - Home Address Change, Marriage / Domestic Partnership, and New Hire : Michael Scott on 06/30/2026 07/29/2026 ☆
Effective: 06/30/2026

Change Contact Information: Benefit Change - Home Address Change, Marriage / Domestic Partnership, and New Hire : Michael Scott on 06/30/2026 07/29/2026 ☆

Created: 08/11/2026 | Effective: 07/22/2026

On **Cancel**

Delegate Task

View Details

This task is on hold and cannot be processed.

Worker **Michael Scott**

You have another benefit enrollment event that must be completed before you can complete this event.

1 item

Enrollment Event	Benefit Event Type	
Benefit Change - Home Address Change : Michael Scott on 07/14/2026	Home Address Change	Change Ben

Delegating a Specific Task from My Tasks

STEP 4:

If you need to delegate a single task rather than setting up a rule:

1. Search for and **select the person** you want to delegate the task to. If needed Add a note explaining why the task is being delegated
2. Click **Submit**

The screenshot shows the 'Delegate Task' form with the following details:

- Created:** 08/11/2026 | **Effective:** 07/22/2026
- Delegating Worker:** Michael Scott
- Business Process:** Benefit Change - Home Address Change : Michael Scott on 07/22/2026
- Task:** Change Benefits for Life Event
- Current Delegates:** (empty)

Annotations and interactions:

- Annotation 1:** A red box highlights the 'Proposed Delegates' section, which includes a red asterisk, a radio button, a text input field, and a menu icon.
- Annotation 2:** A red box highlights the 'Submit' button at the bottom right of the form.
- Dropdown Menu:** A callout box shows the search results for the 'Proposed Delegates' section, listing 'Peers', 'Search for Value', and 'Superiors', each with a right-pointing arrow.

Managing Delegations

STEP 5:

To edit or cancel an existing delegation rule go to **My Tasks** and click **Manage Delegations** in the left panel. You will see a list of your current delegation rules

On behalf of: Michael Scott

Ambient

Search

Home

Organization

Personal

Team

More

Saved

My Tasks

All Items

Saved Searches

Filters

Archive

Bulk Approve

Manage Delegations

All Items

12 items

Search: All Items

Advanced Search

Update Federal Withholdings Elections: Benefit Change - Home Address Change, Marriage / Domestic Partnership, and New Hire : Michael Scott on 06/30/2026

Effective: 06/30/2026

Change Contact Information: Benefit Change - Home Address Change, Marriage / Domestic Partnership, and New Hire : Michael Scott on 06/30/2026

Effective: 06/30/2026

Benefit Change - Home Address Change : Michael Scott on 07/14/2026

Managing Delegations

STEP 6:

1. Click on the Options Menu(...) of the rule you want to change
2. Select Business Process form Actions menu and the click Delegate task to update the current delegates, task type, or dates, or select **End** to cancel the rule

Click **Submit** to save your changes

My Delegations

For **Michael Scott**

Current Delegations

1 item

Business Process

Benefit Change - Home Address Change : Michael Scott on 07/22/2026

Actions

Business Process

Favorite

Event

Delegate Task

View Remaining Process

Subject

Home Contact Change: Michael Scott

Overall Status

In Progress

Initiated On

08/11/2026 02:09:30 AM

Effective Date

07/22/2026

Benefit Change : Michael Scott on 07/22/2026

Delegate Task

Delegating Worker

Michael Scott

Business Process

Benefit Change - Home Address Change : Michael Scott on 07/22/2026

Task

Change Benefits for Life Event

Current Delegates

* ☐ Proposed Delegates

☒ Stop Current Delegations

References

Key Things to Know

- Set up delegation before you go on leave so approvals and tasks are not delayed for your team.
- The person you delegate to will see the tasks in their own My Tasks inbox and can action them on your behalf.
- You can delegate all approvals at once or only specific types (e.g., only absence requests or only expense reports).
- Delegation rules automatically expire on the end date you set. You can also end them early if you return sooner.
- You will still see delegated tasks in your Archive once they are completed by your delegate.
- If you are unsure who to delegate to, check with your manager or HR Generalist.

If A Change Isn't Showing Up:

A change you made may not appear right away. This is usually a display issue, not a lost update. Before contacting support, try:

- Refreshing the page
- Logging out and logging back in
- Clearing your browser cache, cookies, and history

These steps fix most display glitches.

If you have questions or need support, here is how to get help

Support Channel	Details
Email Id	workdaysupport@ambient-enterprises.com

Tip: Bookmark the Digital Resource Repository for quick access to all Workday job aids, recorded demos, and FAQs.