

Workday: Managing Delegations

Document Information

Department: Office of Human Resources | HR Training Template No.:

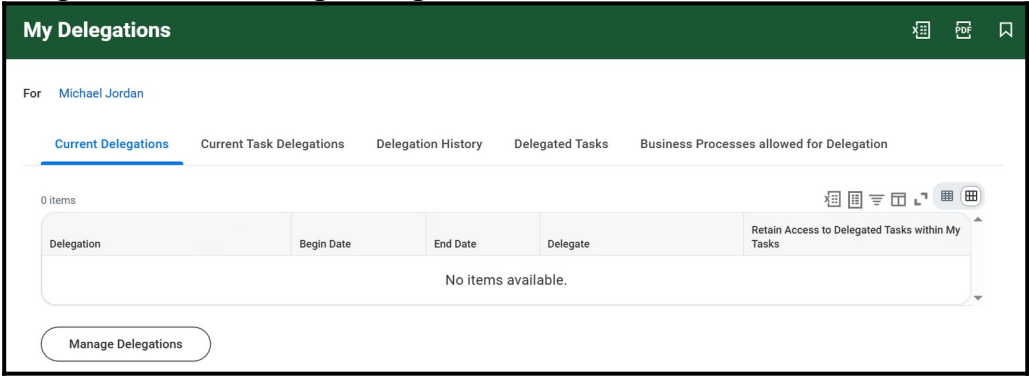
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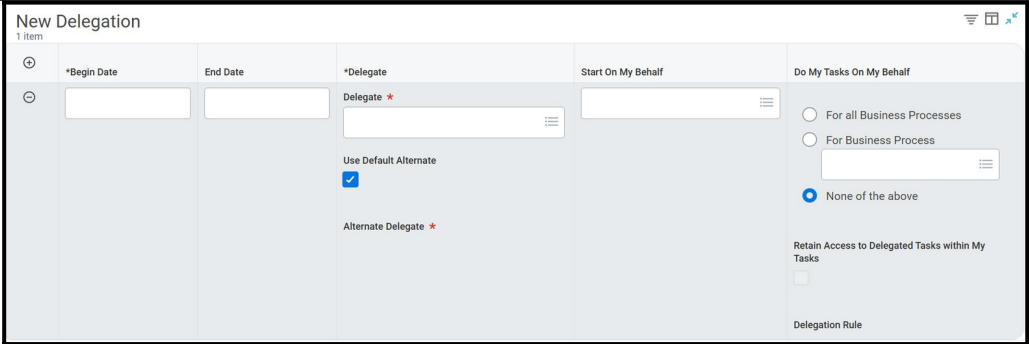
Subject: Managing Delegations

Purpose: Guides managers through the process of setting up and managing delegations. Delegations should be used when a manager is preparing to be out of the office for an extended period to ensure their tasks are re-routed in their absence.

Related References:

Set Up Delegations

Step	Actions
1.	Navigate to the Search Bar and type My Delegations . Select the report once it populates.
2.	This provides a table view of any existing delegations you have set up. To add a delegation, select Manage Delegations. 
3.	Populate the following fields: a. Begin Date – Date you want the delegation to start b. End Date - Date you want the delegation to end (this field is not required) c. Delegate – Select the individual who you want to delegate tasks to d. Start on My Behalf – Select the business process type you want to delegate e. Do Tasks on My Behalf – Select whether you want the delegate to be able to do all tasks related to your selected process type, specific business process tasks related to your selected process type, or none of the above.
4.	Repeat the process above for any additional business processes you wish to delegate. You can add more delegations by selecting the + icon in the top left corner.

Step	Actions
	
5.	Select Submit. Note that you will receive an alert letting you know that when you delegate the creation of an item, you give the delegate access to all of your previously created items of that type.
6.	Select Submit again.
7.	Your delegation request will route to your manager for approval prior to taking effect.

Manage Delegations

Step	Actions
1.	Navigate to the Search Bar and type My Delegations . Select the report once it populates.
2.	This provides a table view of any existing delegations you have set up. To edit a delegation, select Manage Delegations .
3.	You can edit any of the previously-entered information, or you can remove a delegation by selecting the – icon in the top left corner.
4.	Once all edits are made, select Submit .
5.	Note that edits to any existing delegations will re-route to your manager for approval prior to taking effect.

Please reach out to workday@famu.edu for additional information.