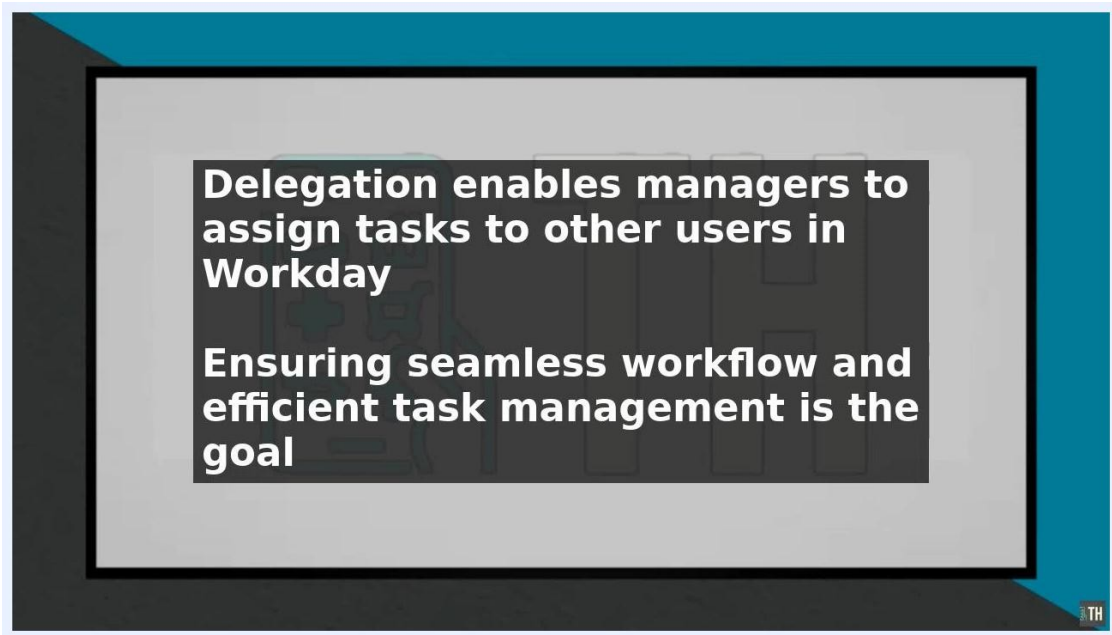


How to Delegate Tasks in Workday

Delegation in Workday allows managers to assign tasks to other users, ensuring seamless workflow and efficient task management. This guide walks you through how to delegate tasks in Workday, from locating the task to tracking its completion, along with best practices to follow along the way.



A slide reading: "Delegation enables managers to assign tasks to other users in Workday. Ensuring seamless workflow and efficient task management is the goal."

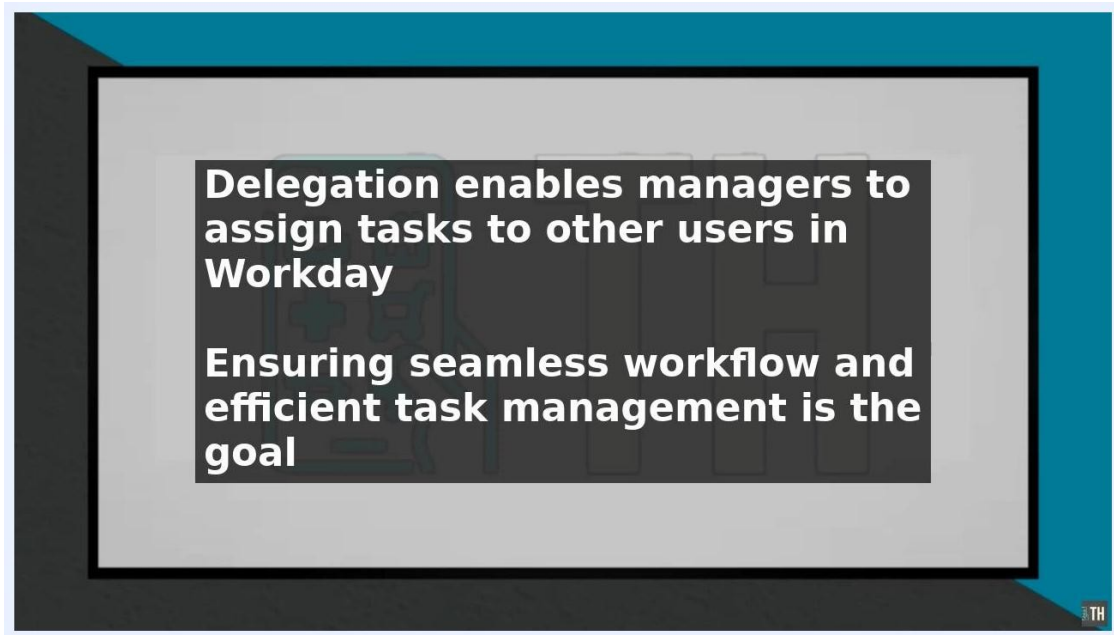
Prerequisites

- An active Workday account with valid login credentials.
- Access to the task or business process you want to delegate.

Step-by-step delegation process

1. Log in to your Workday account using your credentials.
2. Navigate to the specific task you wish to delegate.
3. Click on the task to open its details.
4. Select the Delegate option from the Actions menu. This option is typically found within the task's action or options menu.

5. Choose the user you want to delegate the task to from the list of available users. You can search for users by name or job title to find the appropriate person.
6. Add a comment to provide context and clarify the task requirements. Use this field to specify any important details or instructions the delegatee needs to complete the task.



A slide reading: "Click on the task and select the Delegate option from Actions menu. Choose the user to delegate the task to from available users list."

7. Click the Delegate button to assign the task to the selected user.

After delegation

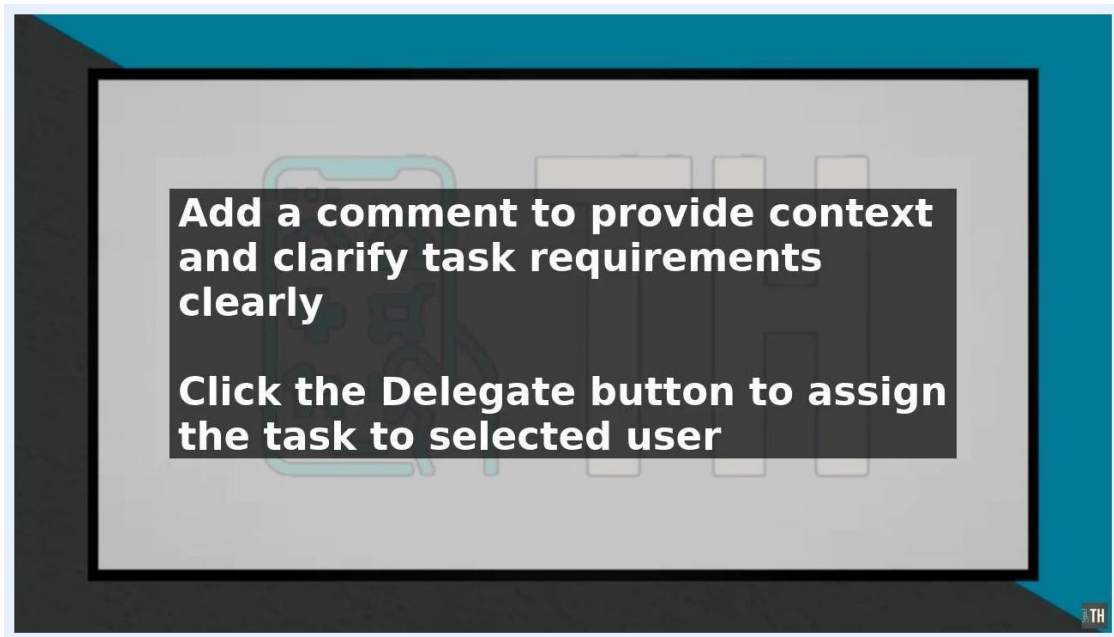
Once delegated, the task appears in the selected user's Workday inbox, where they can view the task details and take the necessary actions.

As the delegator, you can track the status of the delegated task and receive notifications when it is completed or updated.

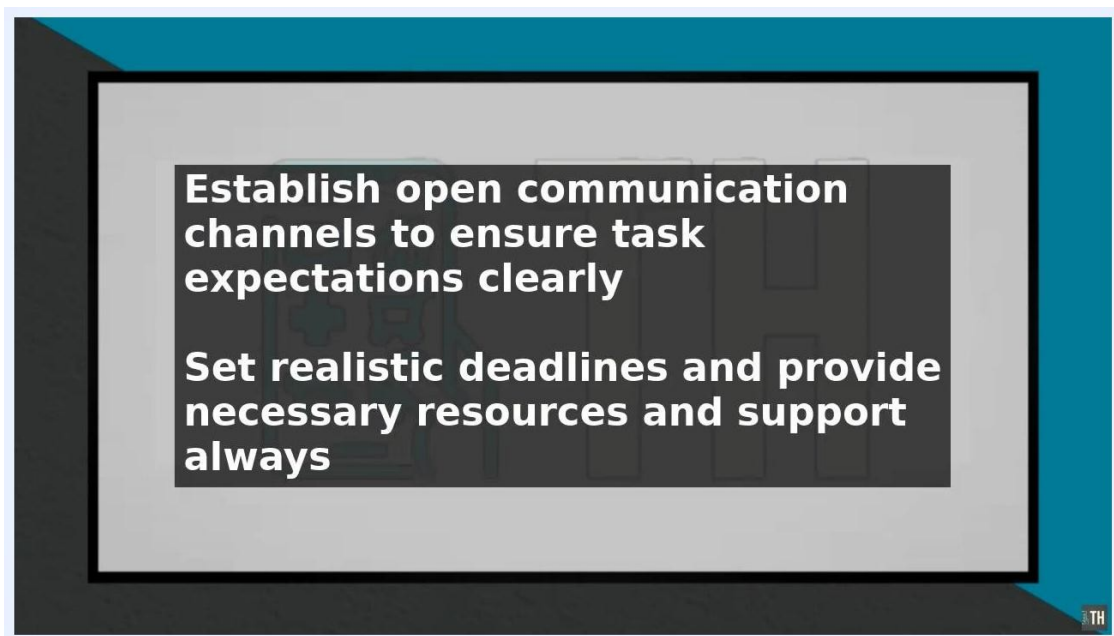
Best practices for delegating tasks in Workday

- Clearly define the task requirements in your comment or instructions.
- Set realistic deadlines for task completion.

- Provide all necessary resources and support to the delegate.
- Establish open communication channels so the delegate understands task expectations and can ask questions if needed.



A slide reading: "Add a comment to provide context and clarify task requirements clearly. Click the Delegate button to assign the task to selected user."



A slide reading: "Establish open communication channels to ensure task expectations clearly. Set realistic deadlines and provide necessary resources and support always"

Delegating business processes

Workday also lets you delegate entire business processes, such as approvals and notifications, not just individual tasks. This feature enables managers to assign responsibilities to other users, ensuring that critical business processes are completed efficiently and effectively.

Delegating tasks in Workday 2025 is designed to be straightforward. By following the outlined steps and best practices, you can streamline workflow and improve overall productivity.

Summary

By following these steps and best practices, you can efficiently delegate tasks in Workday, ensuring smooth operations and effective task management.

Reviewing and adopting these recommendations will help you maximize the benefits of delegation, keeping your business processes handled efficiently and your organizational goals on track.