



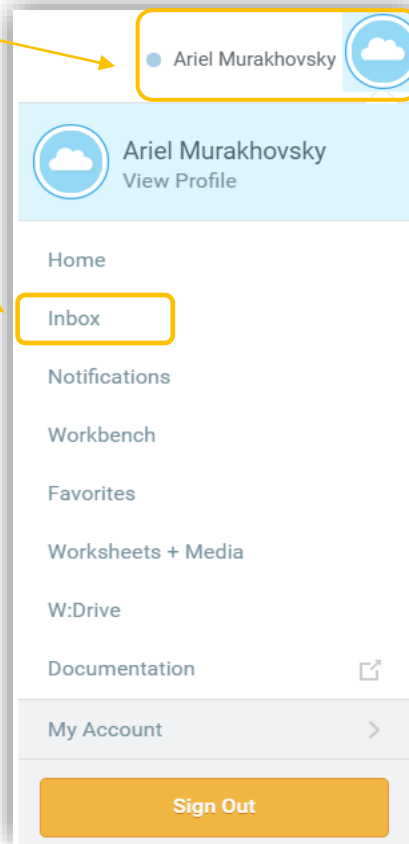
## Delegating Inbox Tasks in Workday

### STEP 1

**Click** on your name in the upper right hand corner to access your "Inbox".

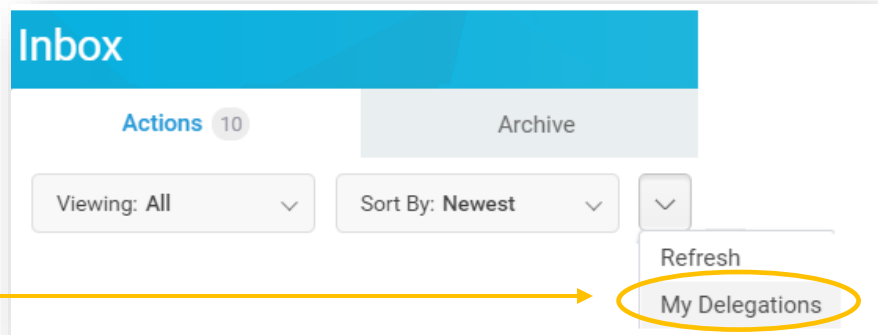
**Click** on "Inbox" to open.

**Note:** Make sure you confirm that it is OK to delegate! Delegating is a great feature, but should not come as a surprise to your delegate.



### STEP 2

**Click** the drop down arrow and select "My Delegations".

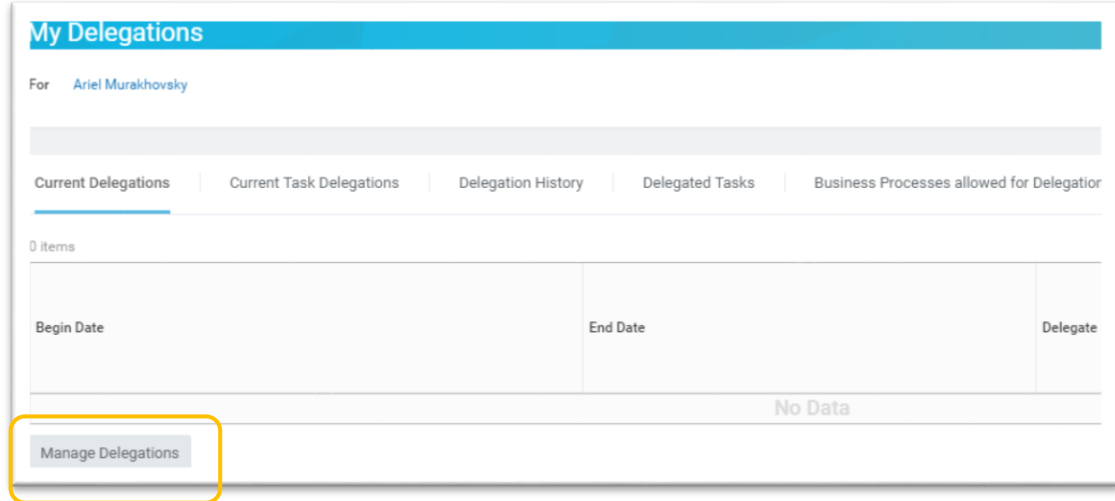




## STEP 3

After clicking on the “My Delegations” button, the “Manage Delegations” button will appear.

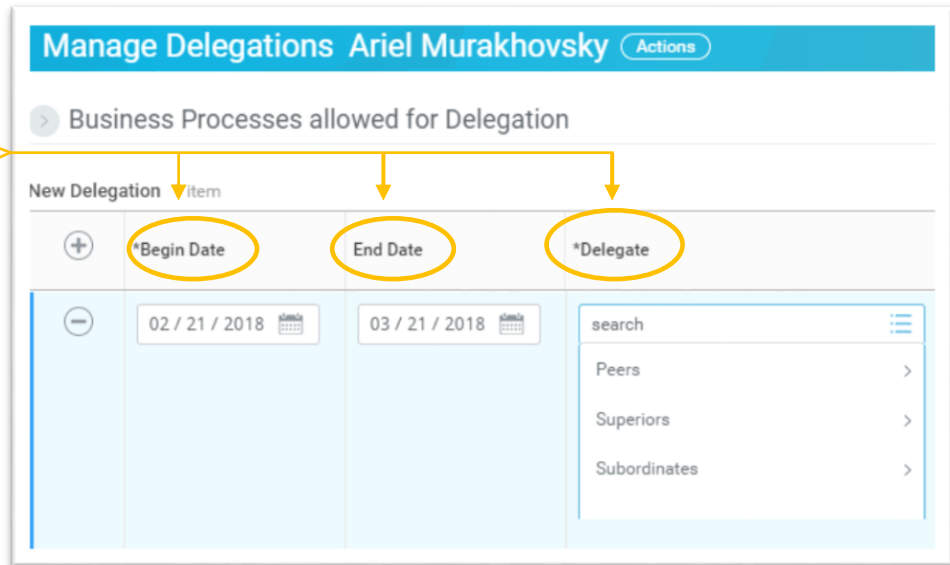
Click on the “Manage Delegations” button.



## STEP 4

Select a begin and end date for the delegation.

In the “Delegate” field, select a delegate from the prompt.



**Note:** Delegation begins and ends according to the time zone of the delegator. If the delegator and delegate are in the same time zone (i.e. EST) then the delegation will begin and end at the specified times in EST. However, if the delegator is on PST, and the delegate is on EST then the delegation will begin and end at the specified times in PST.



## STEP 5

“**Start on My Behalf**” gives the ability for your delegate to start “Business Processes” on your behalf.

Leave the field blank if you are **only** delegating Inbox tasks and **not** Business Processes.

### OR

To delegate the ability to start “Business Processes” on your behalf, **click** on “By Business Process Type” to choose which BP you would like to delegate.

Start On My Behalf

Do Inbox Tasks On My Behalf

search

By Business Process Type >

All >

For all Business Processes

For Business Process

None of the above

Retain Access to Delegated Tasks in Inbox

Delegation Rule

**Note:** You can choose as many Business Processes to delegate as you would like. Some examples include: Change Job, Hire, Period Activity Pay, and Correct Time Off.

## STEP 6

“**Do Inbox Tasks on My Behalf**” will enable you to select Business Processes that include Inbox tasks which are specific to that Business Process.

Depending on your preference, **click:** “For all Business Processes”, “For Business Process” (to choose a specific BP), or “None of the above” (this **will allow you to initiate** Business Processes, but will prohibit you from receiving Inbox tasks related to that Business Process).

Do Inbox Tasks On My Behalf

For all Business Processes

For Business Process

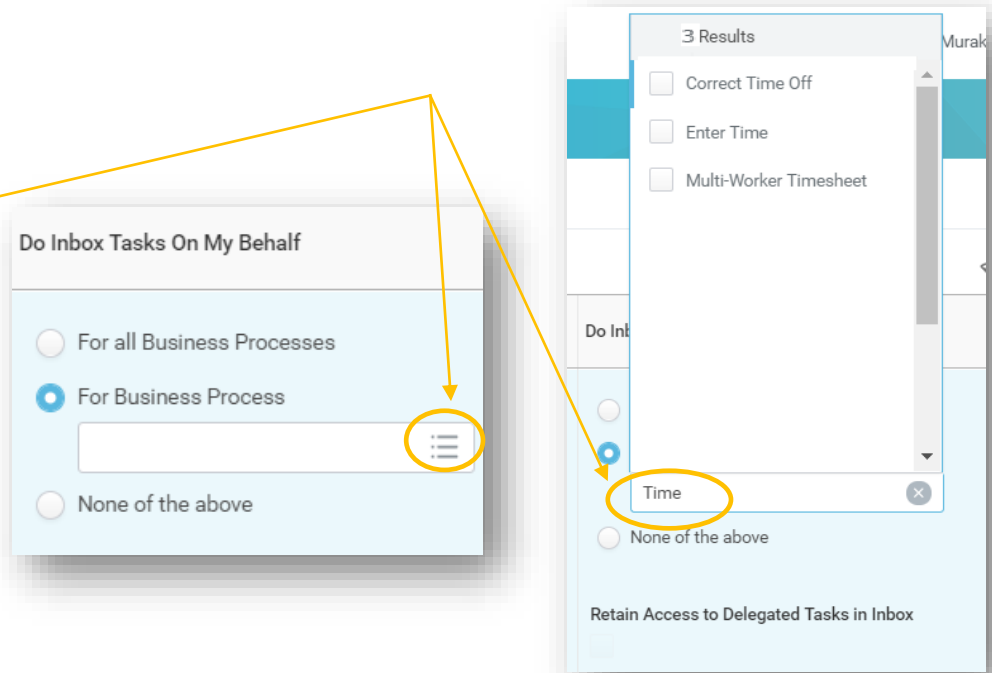
None of the above

# HOW TO GUIDE



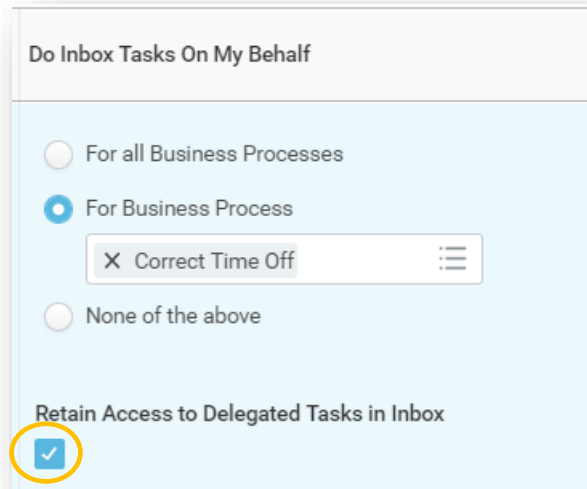
## Helpful Hint

For Business Process selection:  
You can choose from the prompt **OR** type in the name of the process.



## STEP 7

**Select:** “Retain Access to Delegated Tasks in Inbox” to continue to see/have access to the tasks you delegated. Both you and your delegate will then have access to the selected Inbox tasks.



## STEP 8

**Click** “Submit”.

