HOW DO I ... Delegate Inbox Items?

ABOUT THIS TASK: Describes how to delegate all inbox items or only inbox items belonging to a specific type.

AUDIENCE: Faculty members; Staff Employees; Staff Managers. Individuals who need to delegate the action on an inbox item.

DETAILED JOB AID: Delegate Inbox Items

Note: This does NOT delegate accountability and can be set for a period of time.

1. On Workday’s home page, in the Search field, type delegations.

2. Click My Delegations.

3. On the My Delegations page, click Manage Delegations.

4. In the Start Date and End Date fields, use the calendar drop-down to select the dates.

TIP: Leave the End Date field blank if the delegation is for an indefinite period of time.

TIP: Click the “+” icon to create a new line.

5. In the Delegate field, enter the delegate’s name and select your chosen delegate.

In addition to a primary delegate, you must also specify an alternate delegate (system will use for any processes where there is a conflict of interest, e.g., delegate giving themselves additional compensation).

6. Check the Use Default Alternate field. The Alternate Delegate field automatically populates with delegate’s manager. Do not check if you want to manually enter an alternate delegate other than their manager.

7. Under the header Do Inbox Tasks on My Behalf, select the button For all Business Processes to grant your delegate access to all business processes in your inbox. Alternatively, select the button For Business Process to limit your delegate to act on only a subset of inbox items.

8. If the For Business Process option is chosen, search for and select the type of business process(es) for your delegate to act on.

9. Select the checkbox labelled Retain Access to Delegated Tasks in Inbox if you still wish to view and act upon the delegated tasks.

10. Click Submit.

11. Click Done. You are returned to the My Delegations page.