

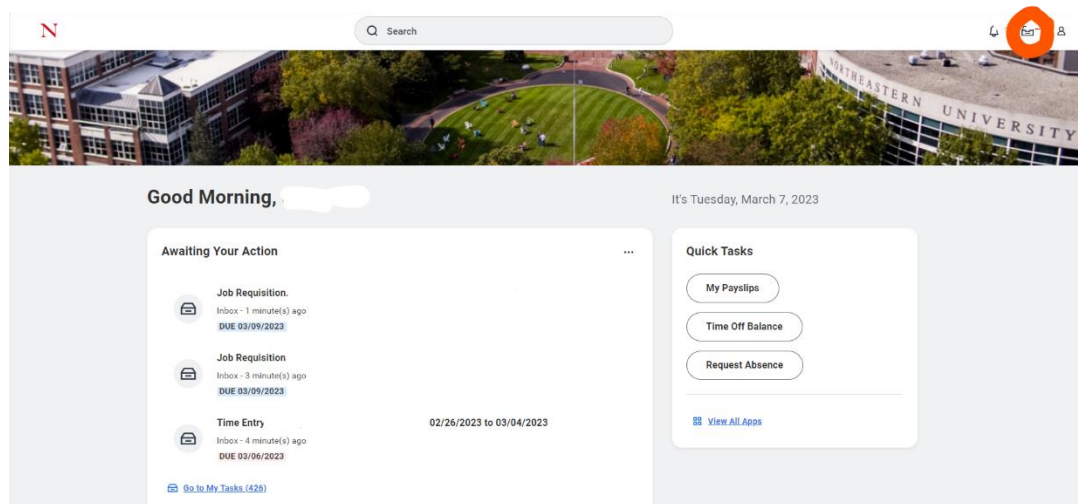
Job Aid | Manage Delegate Assignments



Purpose: This job aid provides step-by-step instructions for managers to delegate Workday Inbox tasks to another employee to perform tasks on their behalf during their period of absence.

Add Inbox Delegations:

1. Click the **Tray** icon on the top right corner of your Workday Homepage to navigate to your Inbox.



2. Navigate to your Workday inbox and click the **Manage Delegations** tab on the left side bar.

MENU

Search

All Items 426 items

Search: All Items

Job Requisite 03/07/2023

Due: 03/09/2023
Effective: 03/07/2023

Job Requisite Assistant 03/07/2023

Due: 03/09/2023
Effective: 03/07/2023

Time Ent 03/07/2023

Hours from 02/26/2023 to 03/04/2023

Due: 03/06/2023
Effective: 03/04/2023

Time Ent 03/07/2023

Hours from 02/26/2023 to 03/04/2023

Due: 03/06/2023
Effective: 03/04/2023

Hi 03/07/2023

Due: 03/08/2023

Review Create Job Requisition

2 minute(s) ago - Due 03/09/2023; Effective 03/07/2023

Start

Details

Supervisory Org

Civil and Environmental Engineerin

Worker Type

Employee

Recruiting Information

Recruiting Details

Number of Openings

100

Reason *

Recruiting > New Position

Approve Send Back Deny ...

3. Click the **Manage Delegations** button.

My Delegations

For

Current Delegations Current Task Delegations Delegation History Delegated Tasks Business Processes allowed for Delegation

0 items

Begin Date	End Date	Delegate	Retain Access to Delegated Tasks in Inbox
No items available.			

Manage Delegations

4. Enter the relevant dates in the **Begin Date** and **End Date** fields to set the duration for delegation.

> Business Processes allowed for Delegation

New Delegation 1 item

*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
		Delegate * <input type="text"/> Use Default Alternate <input checked="" type="checkbox"/> Alternate Delegate * <input type="text"/>	<input type="text"/>	<input type="radio"/> For all Business Processes <input type="radio"/> For Business Process <input checked="" type="radio"/> None of the above <input type="text"/> Retain Access to Delegated Tasks in Inbox <input type="checkbox"/> Delegation Rule

enter your comment

Submit Save for Later Cancel

5. Search and select the person you want to delegate your inbox to in the **Delegate** field.

> **Business Processes allowed for Delegation**

New Delegation 1 item

	*Begin Date	End Date	*Delegate
<div>+</div> <div>−</div>	<div>09/20/2021</div> <div>📅</div>	<div>09/30/2021</div> <div>📅</div>	<div> <div>Delegate *</div> <div> <div>×</div> <div>Natasha Romanoff</div> <div>...</div> <div>⋮</div> </div> </div> <div> <div>Use Default Alternate</div> <div><input checked="" type="checkbox"/></div> </div> <div> <div>Alternate Delegate *</div> <div>Lucy Liu</div> </div>

6. In the **Do Inbox Tasks on My Behalf** section, select the type of tasks that you want to delegate from the list of options:
 - a. All business processes
 - b. Specific business processes

Do Inbox Tasks On My Behalf

☐ For all Business Processes

☐ For Business Process

⋮

☒ None of the above

Retain Access to Delegated Tasks in Inbox

☐

Delegation Rule

Please note that for delegating time sheet approvals, select the **For Business Processes** radio button and enter **Request Time Off** and **Enter Time** business process in the field. This will allow your delegate(s) to view and act on approving time for both salaried and hourly employees.

Do Inbox Tasks On My Behalf

☐ For all Business Processes
☒ For Business Process
☐ None of the above

Retain Access to Delegated Tasks in Inbox

☐

7. Select the **Retain Access to Delegated Tasks in Inbox** checkbox to view and modify your Inbox while delegating.

Start On My Behalf

Do Inbox Tasks On My Behalf

☒ For all Business Processes
☐ For Business Process
☐ None of the above

Retain Access to Delegated Tasks in Inbox

☒

8. If you want to restrict the delegation for a specific business process, search and select the relevant business process in the **Delegation Rule** field.

Start On My Behalf	Do Inbox Tasks On My Behalf
	<input type="radio"/> None of the above
	<div>Retain Access to Delegated Tasks in Inbox</div> <input checked="" type="checkbox"/>
	<div>Delegation Rule</div> <input type="text"/>

10. Click **Submit**.

> **Business Processes allowed for Delegation**

New Delegation 1 item

+	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
			<input checked="" type="checkbox"/> USE DELEGATOR AUTHORITY Alternate Delegate * Lucy Liu		<input type="text"/> <input type="radio"/> None of the above <input checked="" type="checkbox"/> Retain Access to Delegated Tasks in Inbox <div>Delegation Rule</div> <input type="text"/>

enter your comment

Submit Save for Later Cancel

11. A confirmation message is displayed on screen. The request is then routed to Manager for approval.

×

You have submitted

Up Next: Approval by Manager, Due Date

09/23/2021

[View Details](#)

Result:

You have completed the steps to delegate your Workday inbox tasks.