

# Delegate Your Inbox

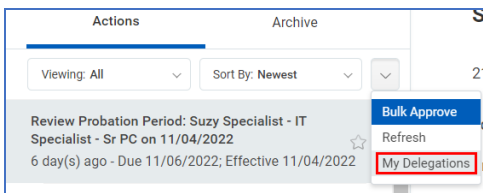
## USER GUIDE

### INTRODUCTION

If you are going to be out of the office, or need someone else to initiate, review, or approve a task on your behalf, you can delegate tasks to someone else. This is different than Reassign Tasks which **permanently** removes the responsibility for a task from one user and assigns it to another.

### CREATE NEW DELEGATION

1. Click on your Workday **Inbox**.
2. Click the drop-down arrow, then select **My Delegations**.




3. Click **Manage Delegations**.
4. Enter the following details:
  - Begin Date
  - End Date
  - Delegate- can be Peer, Subordinate, or Superior  
A list of will appear for you to pick from.
5. **Start on My Behalf**- select the Business Process the delegate can start on your behalf. *If the delegate will only be approving or reviewing for you, leave this blank.*
6. **Do Inbox Tasks On My Behalf** – use the table below to determine which area, if any, should be selected:

<b>For all Business Processes</b>	Allows the delegate to take action on all Business Processes in the inbox.
<b>For Business Process</b>	Allows the delegate to take action on only the specified Business Process. Click in the search box to choose the tasks.
<b>None of the Above</b>	Select to indicate the delegate can only initiate the selected Business Process(es) designated in the <b>Start On My Behalf</b> box.



**Note:** If **Start On My Behalf** is selected, you must also select the same **Business Process** in the **Do Inbox Tasks On My Behalf** section to allow action on initiated items, if necessary.

**Important:** The name of the **Business Process** in the **Start on My Behalf** section may be worded differently than the name of the approval process in the **Do Inbox Tasks On My Behalf** section.

7. **Retain Access to Delegated Tasks in Inbox** is checked by default when you have selected a task to be done on your behalf. This indicates that tasks from the selected Business Processes will appear in your Inbox as well as that of the Delegate.
  - If the **Delegate** completes the task, it will move from the **Actions** tab to the **Archive** tab in both Inboxes.
8. To add more delegates, click the **Plus**  icon to the left of “Begin Date” and repeat the previous steps.
9. Click **Submit**.
10. The delegation will route to your Manager for approval. Click **Done**.

### VIEW CURRENT DELEGATIONS

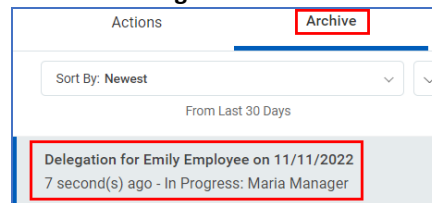
View your current delegations at any time by accessing the **My Delegations** report.

1. From the **Workday Home Page** search for and select the **My Delegations** report in the search bar.
2. Click **Current Delegations** to see current delegations.
3. Click **Current Task Delegations** to see tasks that have been delegated.

### CANCEL DELEGATION – PRE-APPROVAL

To cancel a delegation **before** it has been approved by your Manager take the following steps:

1. From your Workday **Inbox**, click the **Archive** tab.
2. Select the **Delegation Task**.

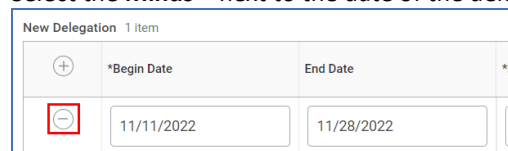


3. On the bottom of the screen, click **Cancel**.
4. Enter a **Comment**, then click **Submit**.

### CANCEL DELEGATION – POST-APPROVAL

To cancel a delegation **after** it has been approved by your Manager take the following steps:

1. Click on Workday **Inbox**.
2. Click the **drop-down arrow**, then select **My Delegations**.
3. Click **Manage Delegations**.
4. Select the **Minus** – next to the date of the delegation.



5. Click **Submit**.