Delegations: Inbox Tasks

PURPOSE

If you will be out of the office and have a few tasks in your inbox that must be approved as soon as possible, you can delegate them to someone else.

This job aid will walk you step-by-step on how to delegate various tasks in your inbox. If you want to assign someone access to work specific tasks in your inbox, please review the job aid <u>My Delegations</u>.

TASKS IN THIS JOB AID

Delegate Tasks from WD Inbox Stop inbox delegation task that has already been assigned

PROCEDURE

Delegate Tasks from WD Inbox			
Step 1	Login to Workday		
Step 2	Go to your Inbox		
Step 3	Click the task you want to delegate		
Step 4	Click the gears 🏶		
	Actions Archive 117 Verwing: All Sort By: Neveest Image: Comparison of the process of the proces of the process of the process of the process of the pr		
Step 5	Click Delegate Task Delegate Task Reassign View Details		



Step 6	In the Proposed Delegates field, type the name of the person you wish to delegate the task to or click on \equiv icon to choose delegate's name from categories	
	Delegate Task	
	5 day(s) ago - Due 11/08/2015; Effective 11/07/2015	
	Delegating Worker Logan McNeil (56789) Business Process Time Entry Mary Iana Dog (12345)	
	Task Approval by Manager	
	Current Delegates (empty)	
	Proposed Delegates Search E	
	Stop Current Delegations	
	enter your comment Search for Value >	
	Subordinates >	
	Superiors >	
Note	Delegator can <u>only</u> assign tasks to his/her Peers, Superiors or Subordinates within their supervisory organization.	
Step 7	Click Submit > Done	
Next Step	Delegator's Primary Manager to review worker delegated task for approval.	
Note	This task will remain visible in your inbox until the delegated task is reviewed and submitted by your Primary Manager.	



Stop inbox delegation task that has already been assigned		
Step 1	Go to your Inbox and select the Archive tab	
	Actions 43 Archive	
Step 2	Click the task you wish to stop delegations for	
Step 3	Click on related action icon in the Business Process	
	View Event Delegate Task for Logan McNeil (5678): Time Entry: Mary Doe (12345) 1 hour(s) ago - Successfully Completed For Logan McNeil (5678) Overall Process Delegate Task for Logan McNeil (5678): Time Entry: Mary Doe (12345) - 7 hours from 11/01/2015 to 11/07/2015 Overall Status Successfully Completed Due Date 11/13/2015	
	Uetails Process	
	Delegating Worker Logan McNeil (5678) Business Process Time Entry: Mary Dec (12345) - 7 hours from 11/01/2015 to 11/07/2015	
	Task Approval by Manager	
	Current Delegates WD / Esting (910) Proposed New Delegates WD Testing (910)	
Step 4	Rest your cursor on Business Process and click Delegate Tasks	
	Actions	
	Favorite View Remaining Process Integration IDs surger	
	Overall Status In Progress Initiated On 11/06/2015 02:41:44 PM	
	Due Date 11/08/2015 Effective Date 11/07/2015	
Step 5	Click Stop Current Delegations button	
	Delegate Task	
	Delegating Worker Scott Miller (92472)	
	Business Process Time Entry: Tom Chen (98526) - 7 hours from 11/01/2015 to 11/07/2015	
	Task Approval by Manager Current Delegates Lulrick Balzora (29764)	
	Proposed Delegates × WD Testing (910)	
	Stop Current Delegations	
Step 6	Click Submit > Done	

