JWA Workday Manager Training

Delegation - Desktop

JWA Workday – Delegate Inbox Tasks
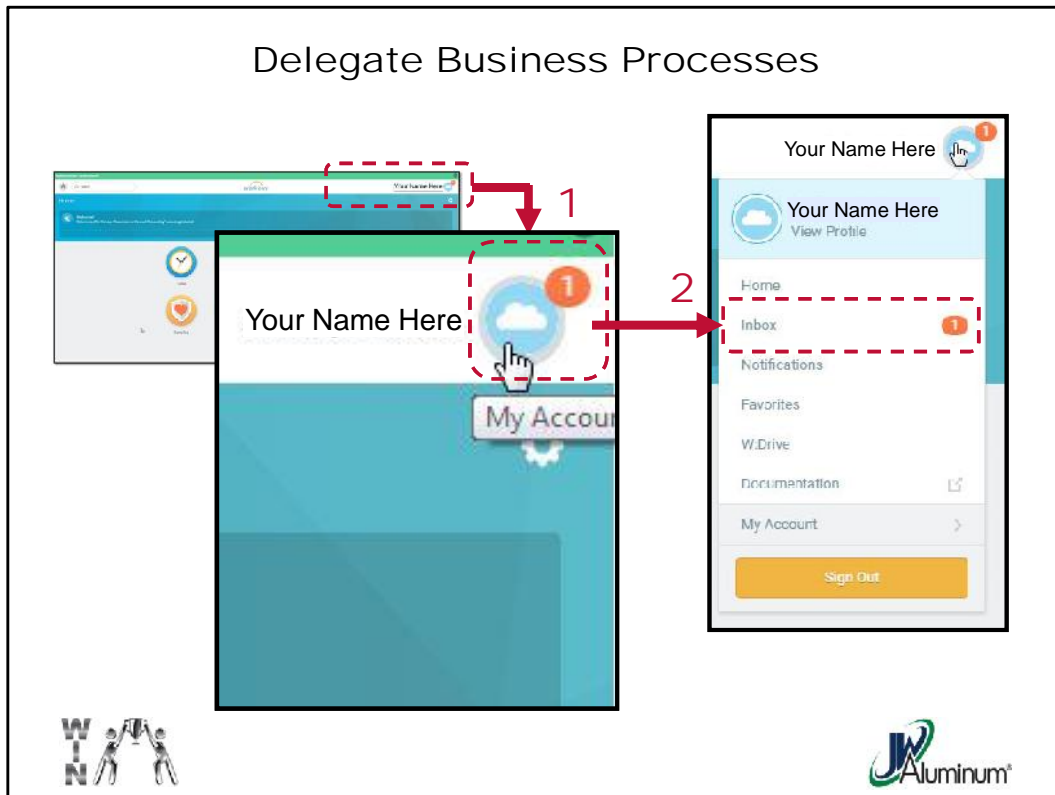
This Training Module Covers:

- Manager Delegating Business Processes
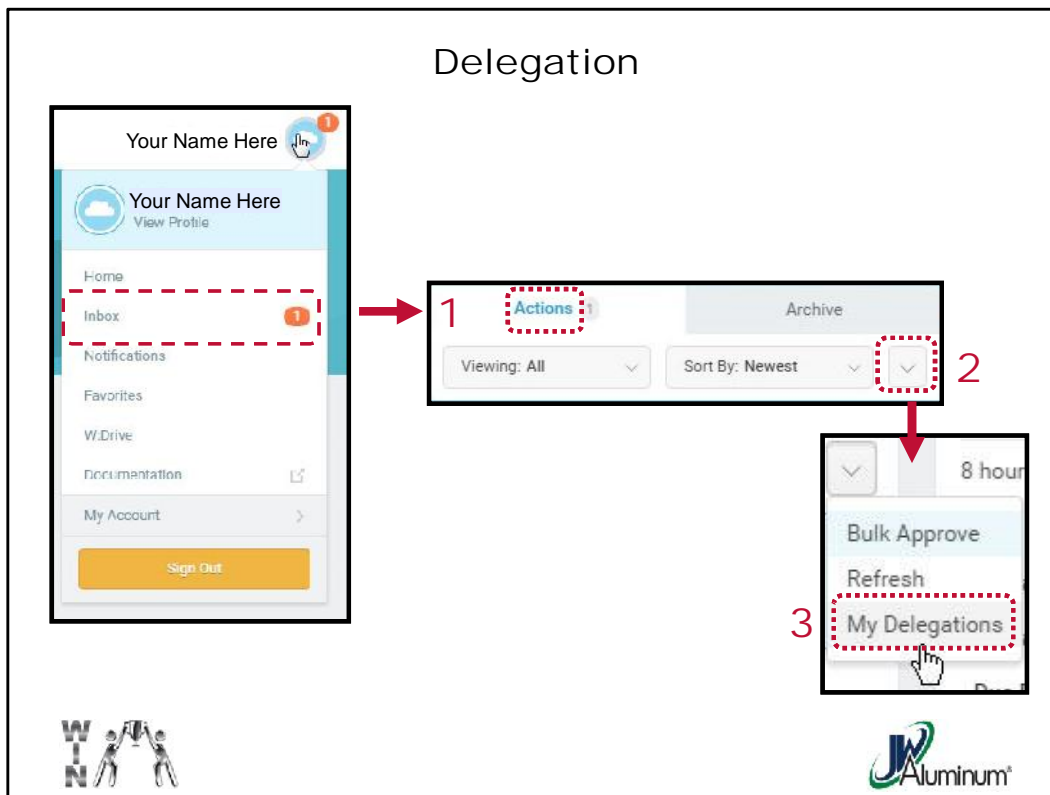
This slide list the subjects covered in this module.

Access your Inbox:

1. Click on the "**My Account" Profile Cloud** located in the upper right corner of any screen.

2. When the "My Account" dropdown box appears, select "**Inbox**."

Delegation

When the Inbox button opens the **Inbox** List on the left side of the screen:

1. Click on the "**Actions**" tab.

2. Click down on the unlabeled **More (looks like a Down Arrow**) menu.

3. On the **More** Menu, select "**My Delegations**."

Delegation

When the "**My Delegations**" screen appears Select "**Manage Delegations**."

When the "**Manage Delegations**" screen appears you will need to populate several fields including the beginning and ending dates, the teammate you wish to delegate to, and the level of Inbox tasks you wish to delegate. To Delegate:

1. For "**Begin Date**" select the **Calendar Icon** and from the popup calendar **select the beginning date**.

2. For "**End Date**" select the **Calendar Icon** and from the popup calendar **select the ending date**.
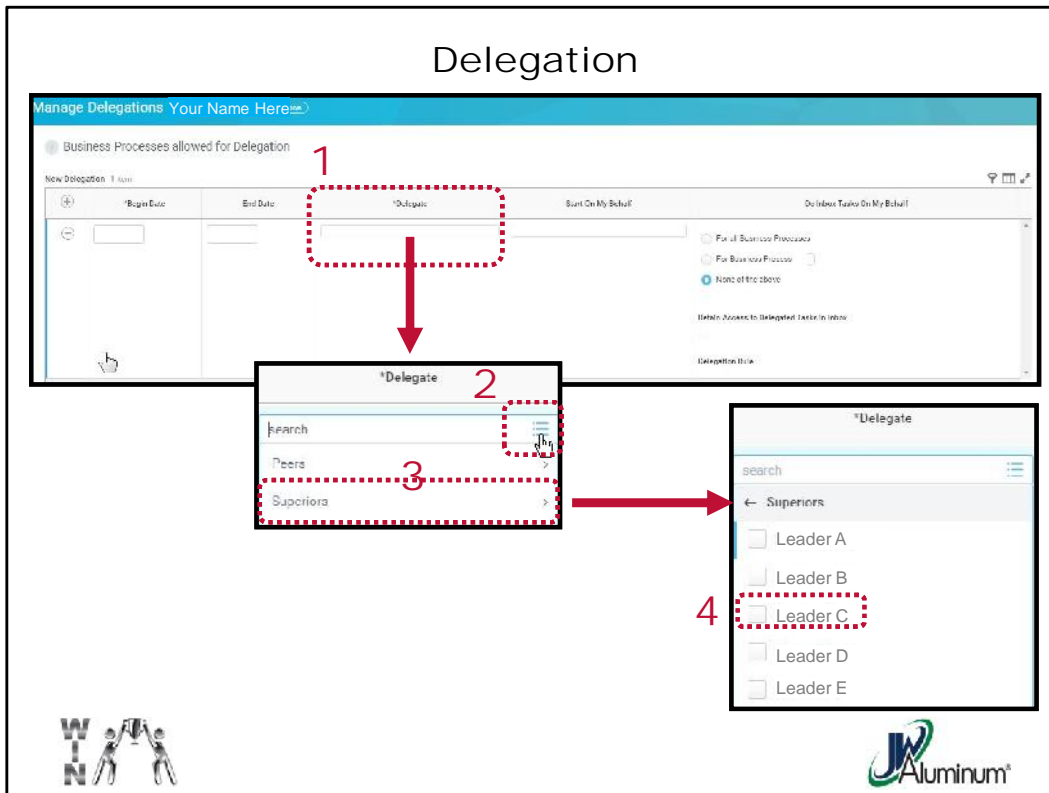
Continuing with the population of the "**Manage Delegations**" screen"

1. For "**Delegate**" select the box to reveal a Dropdown Menu Icon.

2. Click on the **Dropdown Menu Icon** to reveal the list of teammate categories.

3. Select the group you want to select the delegate from. In this example, chose "**Superiors**."

4. When the popup list appears **scroll through** until you find the teammate you wish to delegate to. **Click the Box** next to their name.

For the section identified as "**Do Inbox Tasks On My Behalf**" you will need to determine which Business Processes you wish to delegate.

1. Select:
    a. "**For all Business Processes**" if you want to delegate all functions to the teammate. For this example this is the option chosen.

    b. "For **Business Processes**" with the box, allowing you to choose, **select** the **Dropdown Menu Icon** and **choose** from the Business Processes list the functions you wish to delegate.

    c. "**None of the above**" if you wish to delegate no business processes.

2. **Optional** – If you wish to see your Inbox during the period of delegation click the "**Retain Access to Delegated Tasks in Inbox**" **Box to apply a Check Mark**.

3. Press the Green "**Submit**" button at the bottom of the screen.
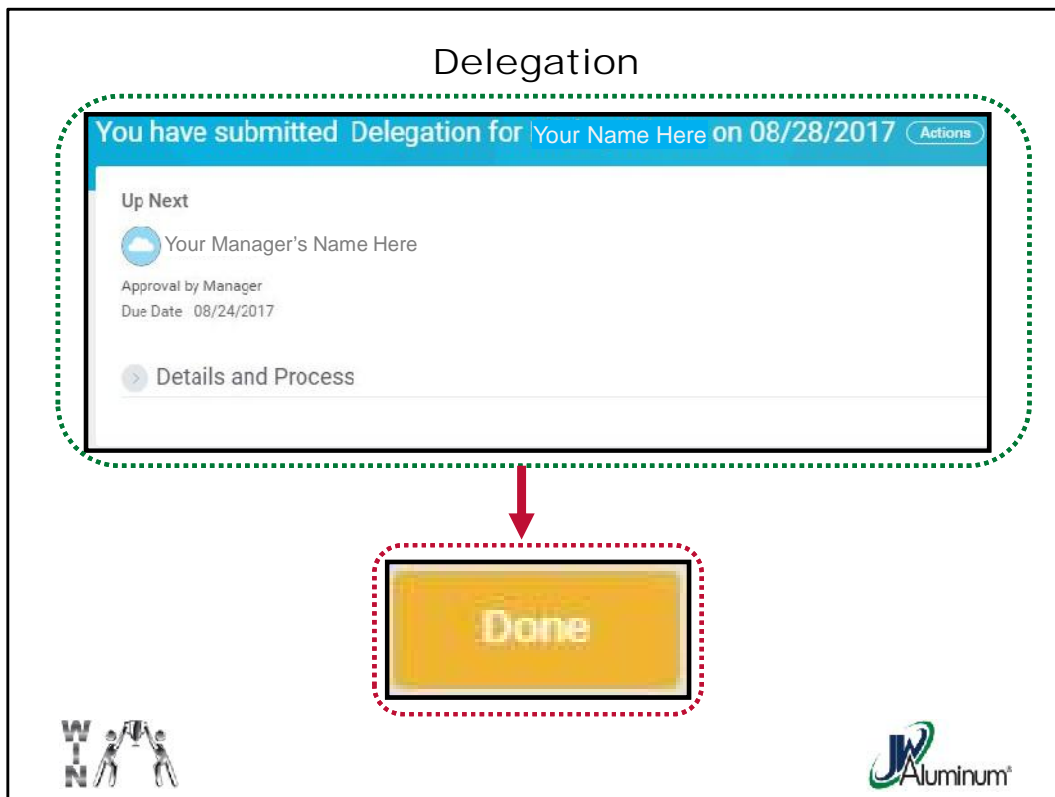
A confirmation screen will appear indicating "**You have submitted Delegation for** …"

Select "**Done**" at the bottom of the screen to complete the task.