



JWA Workday Manager Training

Delegation - Desktop

JWA Workday – Delegate Inbox Tasks

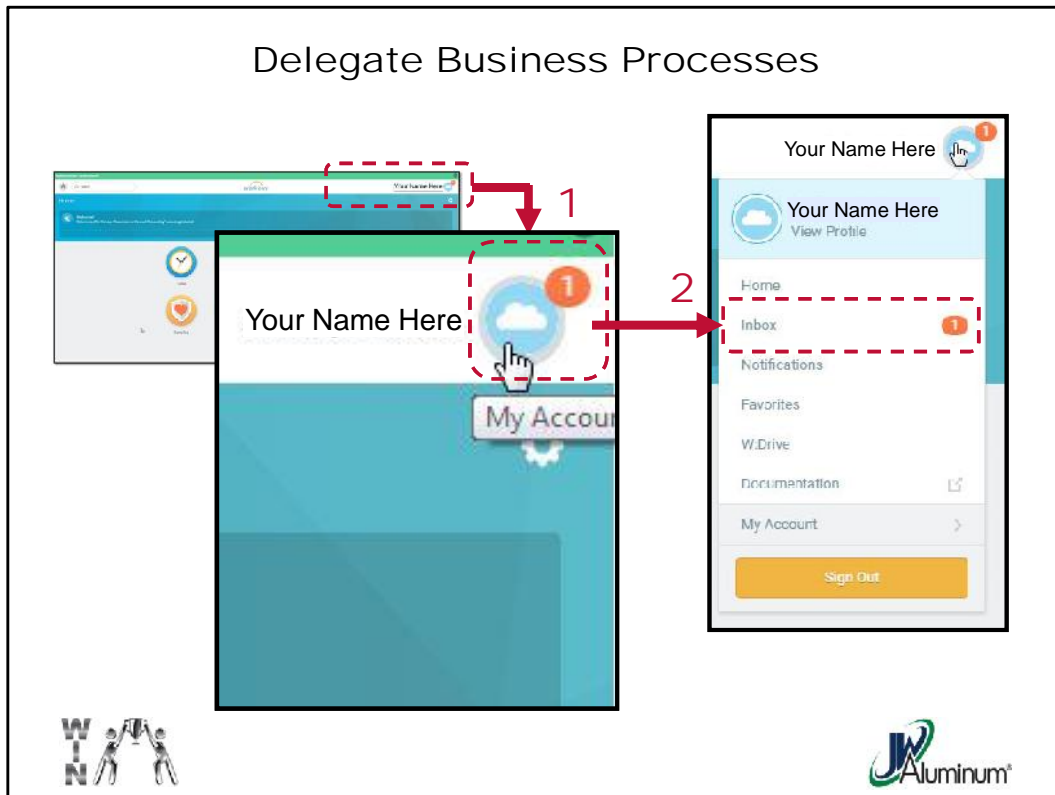
This Training Module Covers:

- Manager Delegating Business Processes



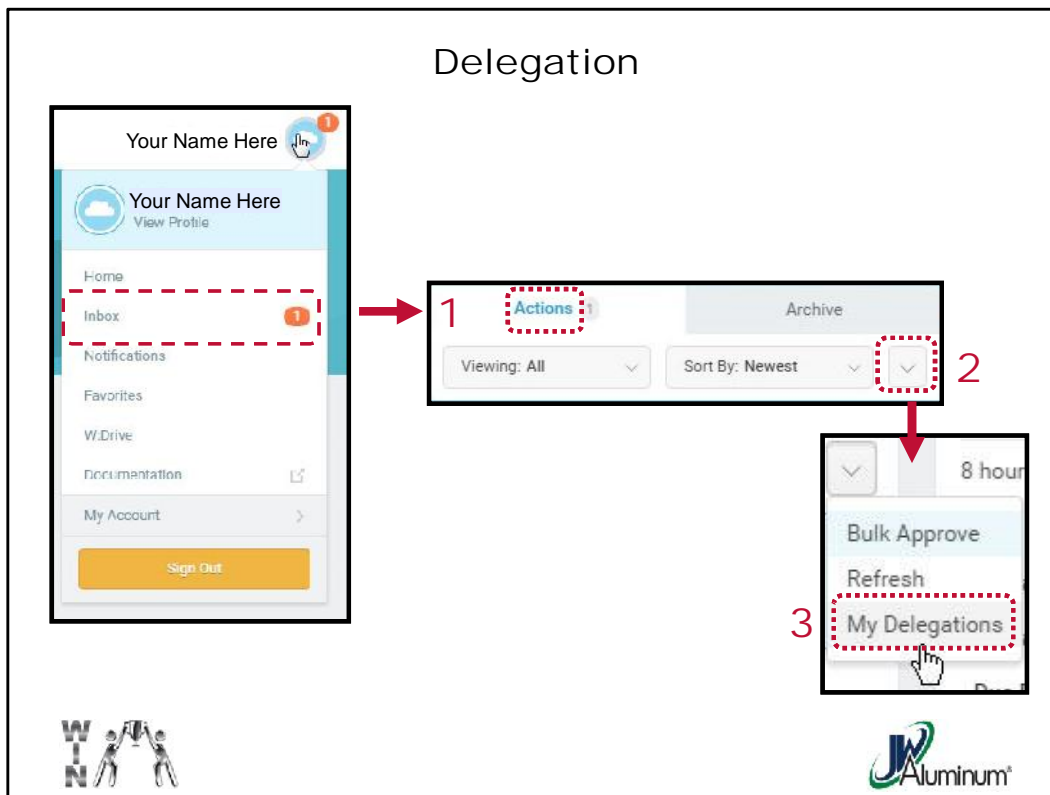
This slide list the subjects covered in this module.

Delegate Business Processes



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."**



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

My Delegations

For [Your Name Here](#)

Current Delegations | Current Task Delegations | Delegation History | Delegated Tasks

Begin Date

[Manage Delegations](#)



When the **“My Delegations”** screen appears Select **“Manage Delegations.”**

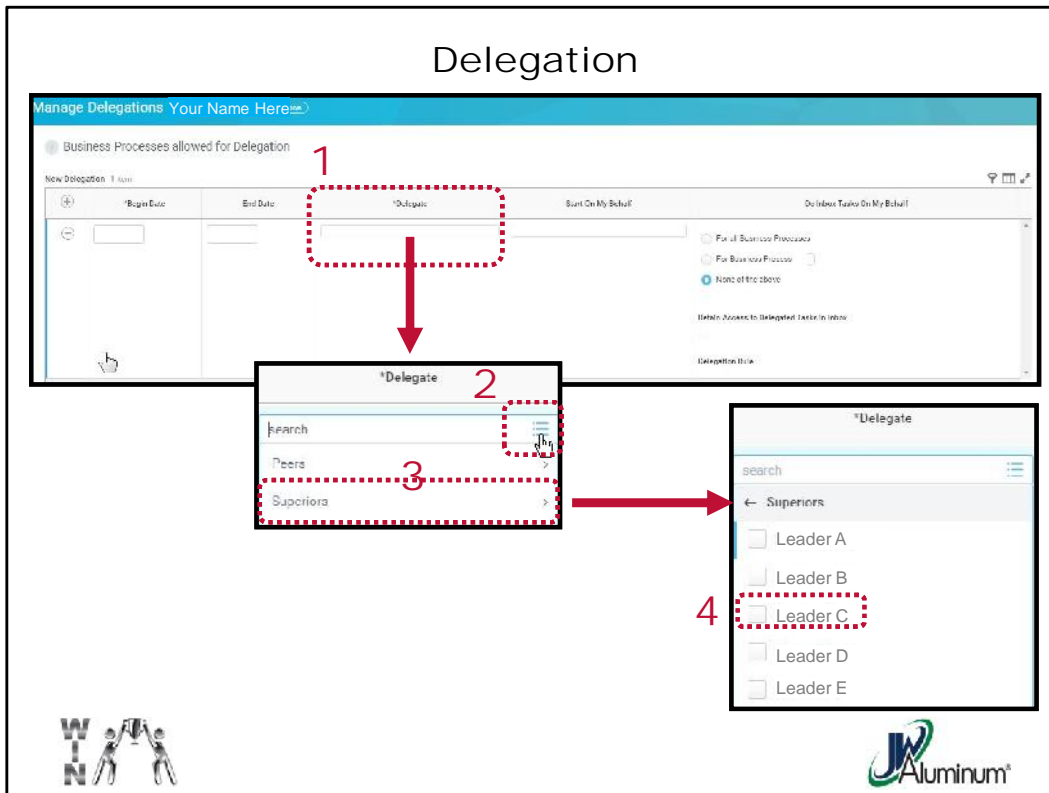
Delegation

The screenshot shows the 'Manage Delegations' interface. At the top, it says 'Your Name Here'. Below this, there's a section for 'Business Processes allowed for Delegation'. The main area has several input fields: 'New Delegation', 'Begin Date', 'End Date', 'Outgoing', 'Start On My Shift', and 'Delegates Task On My Shift'. Red dashed boxes highlight the 'Begin Date' and 'End Date' fields. Red arrows point from these fields to two calendar popups below. The first calendar, labeled '1', shows the 'Begin Date' selection with the date 23 highlighted. The second calendar, labeled '2', shows the 'End Date' selection with the date 22 highlighted. At the bottom left is a 'WIN' logo with two figures, and at the bottom right is the 'JW Aluminum' logo.

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**.

Delegation



Continuing with the population of the “**Manage Delegations**” screen”

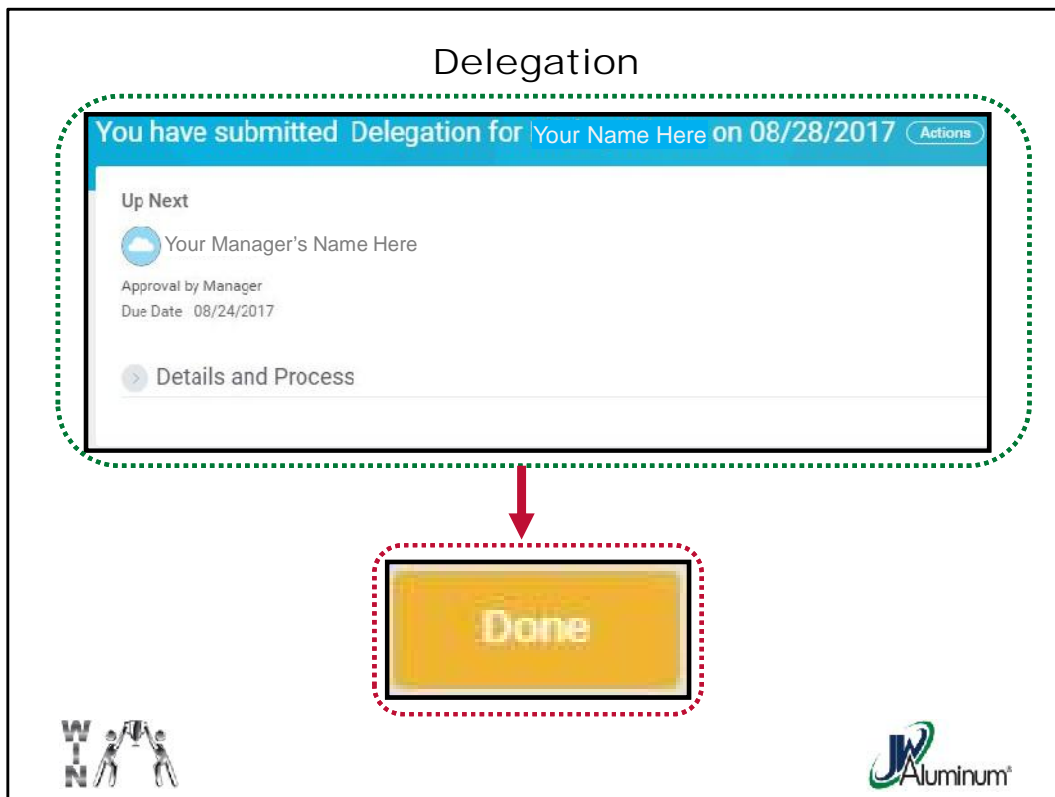
1. For “**Delegate**” select the box to reveal a Dropdown Menu Icon.
2. Click on the **Dropdown Menu Icon** to reveal the list of teammate categories.
3. Select the group you want to select the delegate from. In this example, chose “**Superiors.**”
4. When the popup list appears **scroll through** until you find the teammate you wish to delegate to. **Click the Box** next to their name.

Delegation

The screenshot shows the 'Manage Delegations' interface. At the top, it says 'Manage Delegations Your Name Here'. Below this, there's a section for 'Business Processes allowed for Delegation'. A red arrow points from this section to a modal window titled 'Do Inbox Tasks On My Behalf'. This modal window contains three radio button options: 'For all Business Processes' (selected), 'For Business Processes' (with a dropdown icon), and 'None of the above'. Below these is a checkbox labeled 'Retain Access to Delegated Tasks in Inbox' which is also checked. A red arrow points from the 'Submit' button in the modal to a green 'Submit' button at the bottom right of the screen. The interface also includes a table for 'New Delegation' with columns for 'Begin Date', 'End Date', 'Delegates', and 'Start On My Behalf'. The JW Aluminum logo is visible in the bottom right corner.

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.