



STATEWIDE PERSONNEL
— S Y S T E M —

Delegate a Task in Your Inbox

November 2014



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Delegate a Task in Your Inbox

How do delegations work? A worker that can initiate or approve or perform other tasks may need (or want) to have someone else initiate or approve certain business processes. If you receive tasks in your inbox that are a part of a business process, you can delegate the task, if needed.

Delegations can be done on a one time basis, for a specific period of time. For example, if the is person that would normally perform the task is on vacation.

NOTE:

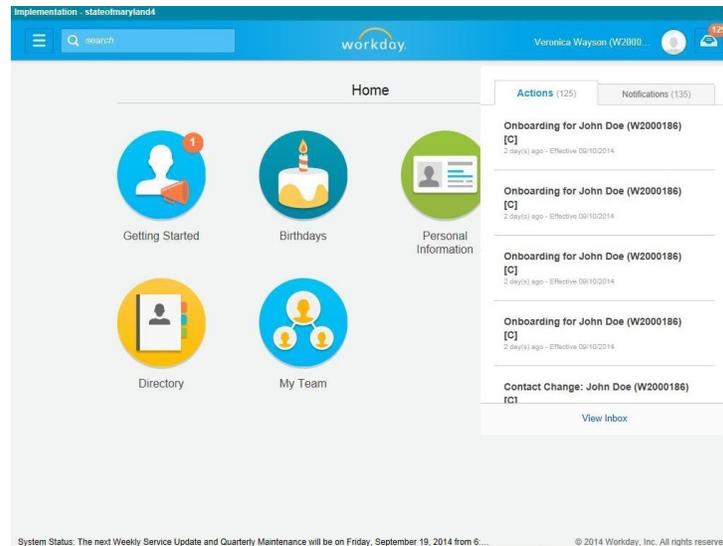
- If a supervisory organization has more than one person who holds some assigned roles, delegation may not be necessary as others in the unit with that role can initiate or approve as appropriate
- Delegation begins at 12:00:01am on the Begin Date and ends at 11:59:59pm on the End Date.
- You can maintain access to your inbox during the delegation period, if desired.
- Your delegate also receives confirmation that he or she will be acting as your delegate for the specified period of time.

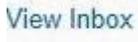
The procedure to delegate tasks in your inbox follows.

Procedure:

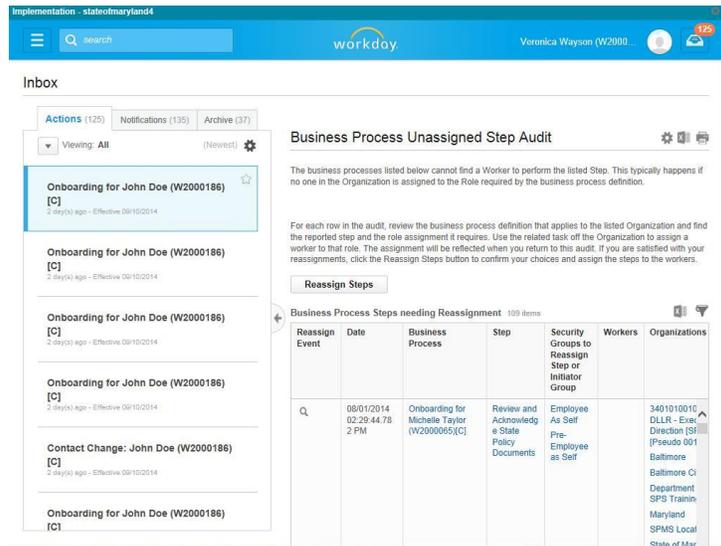
1. Select the Inbox  button.

Home



2. Click the **View Inbox**  hyperlink.

Inbox

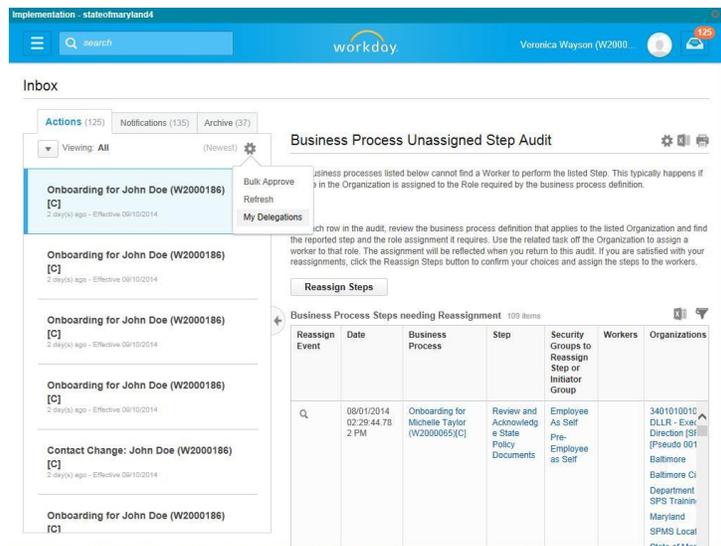


The screenshot shows the Workday interface for 'Implementation - stateofmaryland4'. The user is Veronica Wayson (W2900). The inbox contains several items, including 'Onboarding for John Doe (W2000186)'. A 'Business Process Unassigned Step Audit' is highlighted, with a description: 'The business processes listed below cannot find a Worker to perform the listed Step. This typically happens if no one in the Organization is assigned to the Role required by the business process definition.' Below the audit is a table titled 'Business Process Steps needing Reassignment' with 109 items.

Reassign Event	Date	Business Process	Step	Security Groups to Reassign Step or Initiator Group	Workers	Organizations
Q	08/01/2014 02:29:44.78 2 PM	Onboarding for Michelle Taylor (W2000065)(C)	Review and Acknowledge State Policy Documents	Employee As Self Pre-Employee as Self		3401010010 DLLR - Executive Direction (S) (Pseudo) 001 Baltimore Baltimore Ci Department SPS Trainin Maryland SPMS Local State of Mar

3. On the Actions tab, click the Settings  icon.

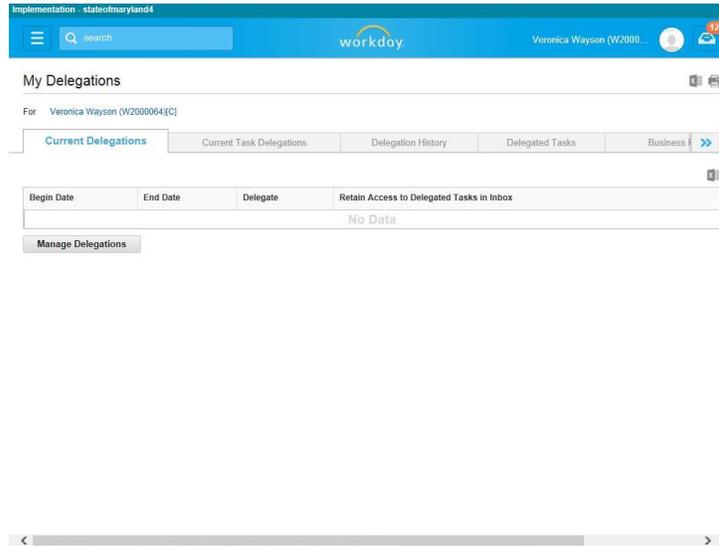
Inbox



This screenshot is similar to the previous one, but a context menu is open over the first 'Onboarding for John Doe (W2000186)' item. The menu options are 'Bulk Approve', 'Refresh', and 'My Delegations'. The 'My Delegations' option is highlighted in blue.

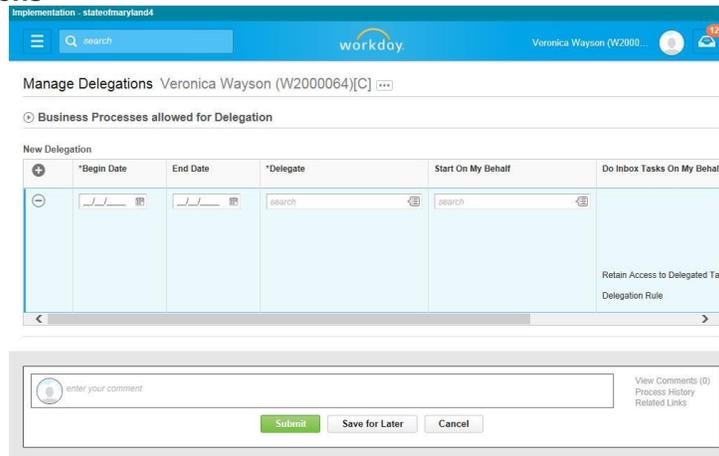
4. Click the **My Delegations** [My Delegations](#) hyperlink.

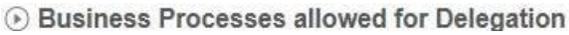
My Delegations



- On the My Delegations page, click the Manage Delegations  button.

Manage Delegations



- If desired, click the arrow next to the Business Process allowed for Delegation section. View the tasks that you are allowed to delegate to others. 
- Click the Calendar button to select the Begin Date.
- Click the Calendar button to select the End Date.



Information: To delegate for a single day, enter the same Begin Date and End Date.

- Type or use the prompt to select the Delegate.



Information: You can delegate tasks to your peers (e.g., other individuals that are assigned your same role within your supervisory organization) or to your superiors (e.g., individuals in your management chain).



Information: You can select more than one person to whom you will delegate tasks. Click each name you want to add. The names display in the Delegate field once selected.

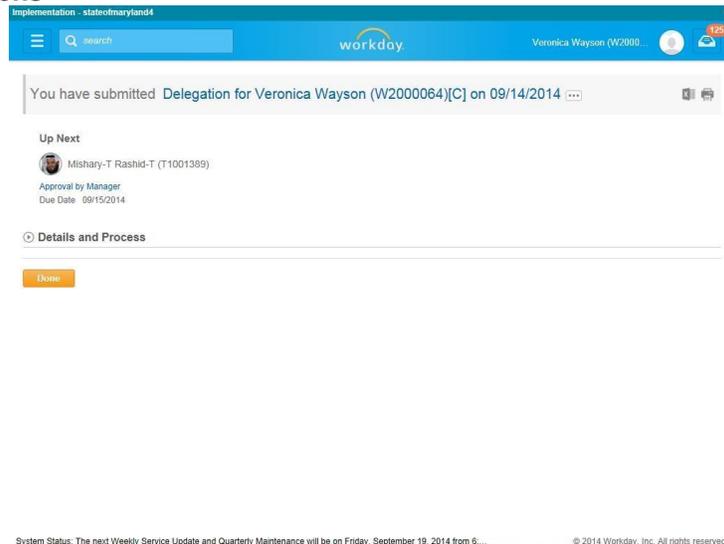
10. Select whether to delegate all business processes, specific business processes, or none of the above in the Do Inbox Tasks On My Behalf column.
11. If you wish to retain access to your Inbox tasks during delegation, click the Retain Access to Delegated Tasks in Inbox checkbox.
12. When you are done, click the Submit  button.



Tip: If you do not want to submit the request at this point, you can also click one of the following buttons:

- Click **Save for Later** to save your changes but not submit.
- Click **Cancel** to cancel the process and start at another time.

Manage Delegations



13. Click the Done  button.



Information:

- The delegation request has been submitted. Delegated tasks require approval by a manager. This is the next step in the process.
- Your delegate also receives confirmation that he or she will be acting as your delegate for the specified period of time.
- Delegation requests can be updated or canceled at a later date, if needed. See the *Update or Cancel a Delegation Request* guide for details.



Tip: After completing a task in a business process, you can view the next step.

- Click the arrow next to **Details and Process** to expand the section.
- Click the **Process** tab to see the path that the process will take.

14. The System Task is complete.