Getting Started: Manager Inbox

Business Process/Tasks
For each task you perform in Workday, there is a business process, which defines the required steps. To view your tasks, click the Inbox worklet.

Inbox and Notifications
To view your Inbox:

1. Click the Profile icon > Inbox.
   The Actions tab will contain your business process tasks, approvals, and to-dos. Actions can be filtered with the view pull-down menu.
   The Archive tab displays the process status of any business process you have been involved in.

2. Click Notifications from the Profile icon. Here, you can view configurable alerts (birthdays, anniversaries, time off, etc.) and reporting notifications.

Archive Tasks / Status
1. Click your Profile icon > Inbox.
2. Select the Archive tab, which tracks all business processes you have initiated. The Actions tab will contain your business process tasks, approvals, and to-dos.

Add Inbox Delegations
From the profile menu:

1. Click Inbox and the Actions tab.
2. Click the unlabeled pull-down list and My Delegations. Here you can view your current delegations or add new ones.
3. Click the Manage Delegations button.
4. Select Begin and End dates to let the system know how long the delegation will last.
5. Select the person you want to delegate your inbox to. Typically this would be someone on your management team or one of your peer managers.
6. Select the business processes you want your delegate to do inbox tasks on your behalf or select For all Business Processes.
7. Click Submit.

Your screens and processes may vary from those described here.
**Reassign Tasks**

From the profile menu:

1. Click Org Chart to view the Timekeepers and Time Approver’s aligned to you.

2. Navigate to the required Timekeeper or Time Approver’s profile.

3. Click Actions, select Business Process, and choose the Reassign Tasks option.
   
   *Note:* The selected employee’s name defaults into the Reassign Tasks for Worker field.

4. Click Ok to confirm this is the correct employee and go to the Reassign Workers Tasks screen.

5. Select the required employee from the Reassign To field.
   
   *Note:* The manager can reassign the task to themselves or another employee.

6. Enter a reason for the reassignment in the Reassignment Reason field.

7. Click Ok to confirm the change in assignment.
   
   *Note:* Workday displays the message, “The task was completed successfully.”