

# Getting Started: Delegate Your Inbox

All Employees

## Purpose of the Inbox

Your Inbox includes notifications of tasks, approvals, due dates, etc., sent to you as part of your organization's business processes. The Inbox delegation feature is used to designate someone to handle important Inbox tasks when you're out of the office.

## Add Inbox Delegations

From the profile menu:

1. Click **Inbox** and the **Actions** tab.
2. Click the  pull-down list next to and click **My Delegations**. Here you can view your current delegations or add new ones.
3. Click the **Manage Delegations** button.
4. Select **Begin** and **End Date** to let the system know how long the delegation will last.
5. In the **Delegate** field, 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.



**Note:** If you are only delegating Inbox tasks, leave the **Start On My Behalf** field blank. This option is for delegating the initiation of business processes.

6. In the **Do Inbox Tasks on My Behalf** field, select whether to delegate all business processes, specific business processes (click ), or none of the above.
7. Mark the **Retain Access to Delegated Tasks in Inbox** check box to view and modify your Inbox while delegated.

8. Select a **Delegation Rule** if you are delegating a business process.
9. Add comments or attachments if needed.
10. Click **Submit**. A confirmation displays. Depending on your organization's security settings, additional approvals may be required.
11. Click **Done**.



**Note:** Click the **Business Processes Allowed for Delegation** tab to view which business processes you can delegate.

## When to Delegate Your Inbox

Always initiate an Inbox delegation when you're out of the office for an extended period of time such as leave, vacation, special privilege, spring break, summer break, etc. or when you will be off for a single day and attendance must be approved by your manager.

## Who to Delegate Your Inbox To

Typically an Inbox is delegated to someone on your management team or one of your peer managers. Timekeepers should always delegate their Inbox to a Principal, (Assistant Principal or Network Leader if the Principal is out), or Manager.

**NOTE:** Delegating tasks should be done on a temporary basis. If there is a permanent change of duties, tasks should be reassigned not delegated.