This job aid provides instructions for these tasks within Workday that are available to managers: 1) Add Applications (Worklets), 2) Workday Inbox, 3) Inbox Actions & Archive, 4) Check the Status of My Processes, and 5) Delegate your Inbox.
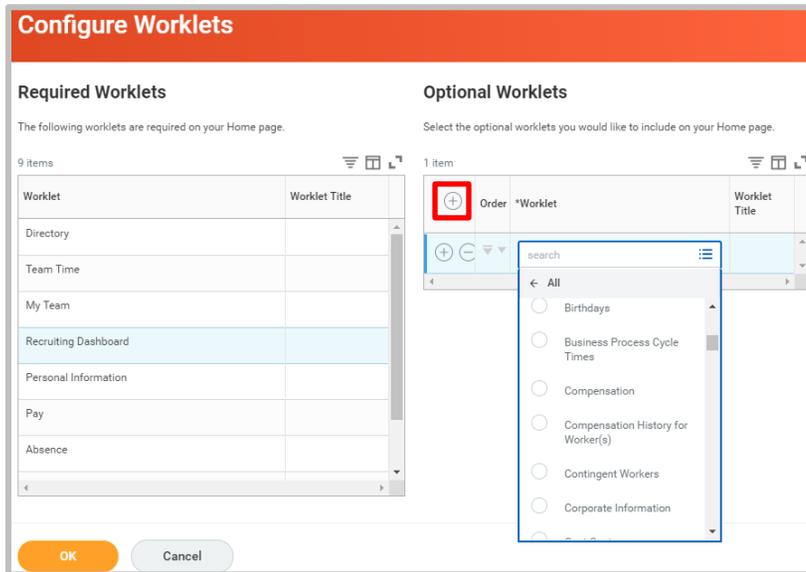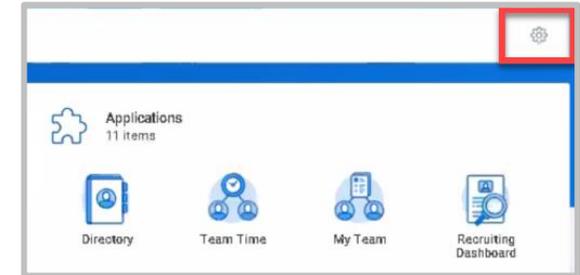
ADD APPLICATIONS (WORKLETS)

When you log into Workday, the applications that you are going to use the most will show on your Home page. You can add, remove, or rearrange worklets using the **Configure Applications** icon.

1. Click the **Configure Applications** icon.

On the **Configure Worklets** page, the left side will display Required Worklets (these cannot be edited), and the right side will display Optional Worklets.

2. Click the **Plus** icon to add a new worklet.

3. Click into the blank field created and select **All** to display a list of options.

4. Scroll to the desired application and select the **Title** to add the worklet.

5. Click the **Up Arrow** or **Down Arrow** to reposition worklets to appear at the top or the bottom of your **Home Page** screen.

6. Click **OK** and **Done** to save your changes.

WORKDAY INBOX

All of the items routed to you will come through your **Workday Inbox**. You can access your inbox using the link on the left-side of the page beneath the general Announcements box, or by using the **Inbox icon** in the top right corner of the page. On the **Inbox icon**, the circled number indicates the number of tasks assigned to you that are awaiting action.
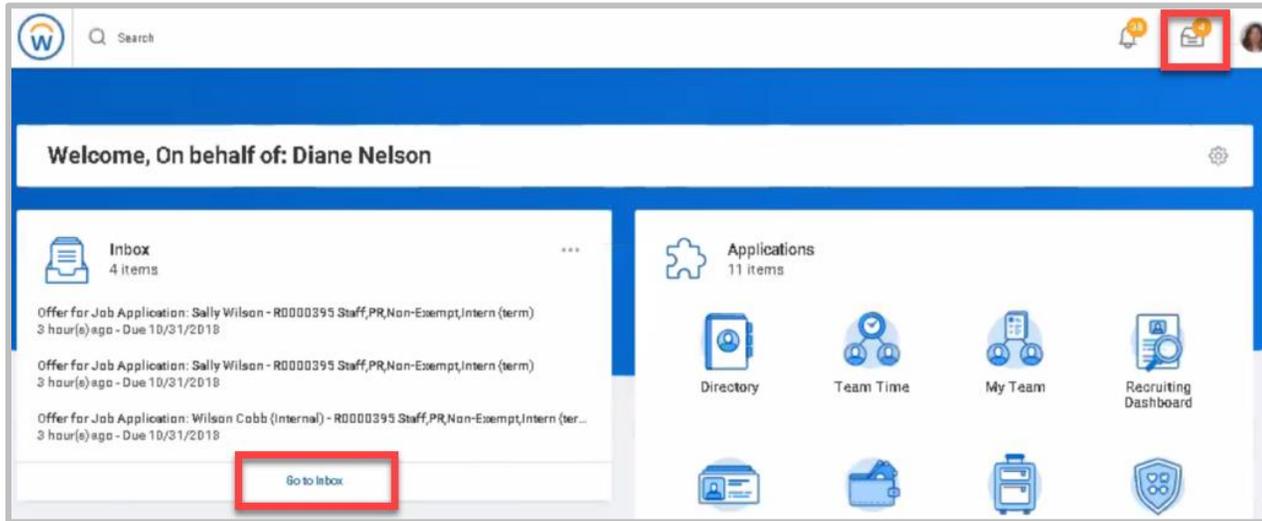

The circled number on the **Notifications icon** indicates the number of items for your information. These do not require action. Notifications are alerts from specific business processes that are configured to provide you information. For example, if you request a report, Workday will send a notification when your report is ready.

INBOX ACTIONS & ARCHIVE

Clicking on the Inbox icon, you will next see an **Actions** tab, and an **Archive** tab. The view will default to the **Actions** tab, where you will see the tasks and business processes for you to approve, with the newest item on top.

From the **Archive** tab, you will be able to see the history of business processes you've been involved with. (See *Check Status of My Processes* section below.)
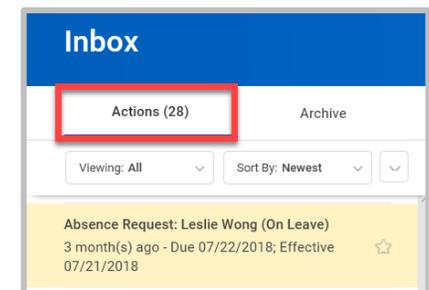
CHECK THE STATUS OF YOUR PROCESSES

To review or check the status of a process from your Workday inbox:

1. Click the **Archive** tab. Here you will see any business processes with which you have been involved in the last 30 days.

2. Click a task in the left-hand column of the Process History grid to access the *Details*, *Process History*, and *Related Links* of the selected business process.
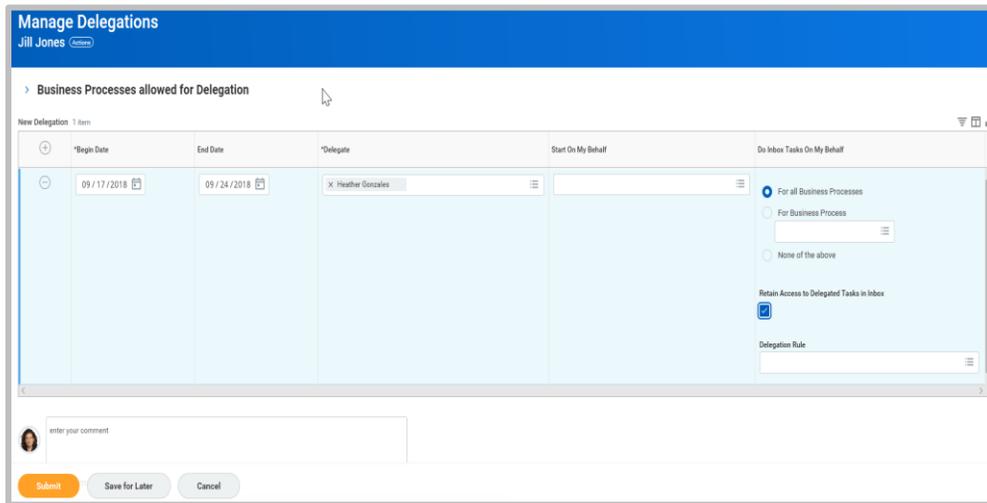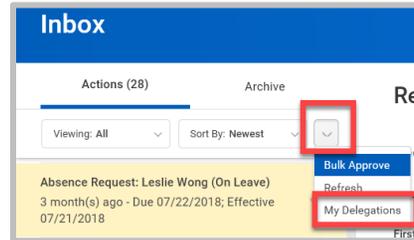
DELEGATE YOUR INBOX

Workday allows you to delegate your Inbox items to a colleague if you are unable to perform the actions yourself due to time off or a leave of absence.

From the Actions tab:

1. Click the **More dropdown box.**

2. Select **My Delegations**.

3. Click **Manage Delegations**.

4. Enter the **Begin Date** and **End Date** for the delegation.

5. In the **Delegate** field, select a user to whom you want to delegate your tasks.

> **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*, or *none of the above*.

7. Select the **Retain Access to Delegated Tasks in Inbox** checkbox to retain view and modify capability to your Inbox.

8. Select a *Delegation Rule* if you are delegating a business process.

9. Click **Submit**. A confirmation will display. Depending on your organization's security settings, additional approvals may be required.

10. Click **Done.**

Note: To view which business processes you can delegate, select the **Business Processes Allowed for Delegation** tab on the *Manage Delegations* page.