Getting Started: Use Your Inbox

Purpose of the Inbox
Your Inbox includes notifications of tasks, approvals, due dates, etc., that are sent to you as part of your organization’s business processes.

View Your Inbox
1. Click your Profile Icon in the upper right hand corner.
2. Click Inbox to expand your viewable options.
3. Click the Actions tab to view your business process tasks, approvals, and to dos.
4. Click the Archive tab to access the process status of any business process you have been involved in.

Delegate Your Inbox
From the Actions tab:
1. Click More > My Delegations.
2. Click Manage Delegations.

3. Enter the Begin Date and End Date for the delegation.
4. Select a user to delegate your tasks to in the Delegate field.

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.

5. In the Do Inbox Tasks on My Behalf field, select whether to delegate all business processes, specific business processes, or none of the above.
6. Mark the Retain Access to Delegated Tasks in Inbox check box to view and modify your Inbox while delegated.
7. Select a Delegation Rule if you are delegating a business process.
8. Click Submit. A confirmation displays. Depending on your organization’s security settings, additional approvals may be required.
9. Click Done.

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

Your screens and processes may vary from those described here.