

Establish Delegations– Use when you need to delegate a task

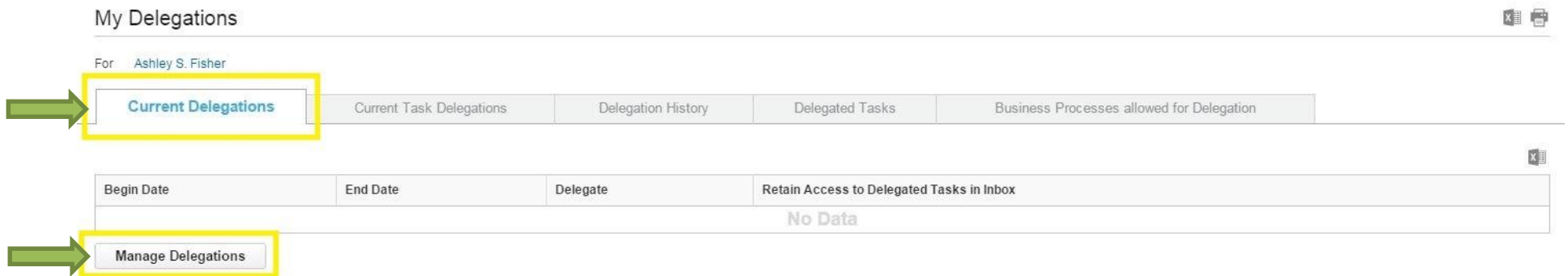
How to Access Delegations

Note: All Asterisks (*) need to be completed. **As a cardholder, you can have a pCard approver prepare expense reports on your behalf.**

Access the My Delegations task



1. The **My Delegations** page will display:
 - a. Under the **Current Delegations** tab, click **Manage Delegations**.



My Delegations X Print

For Ashley S. Fisher

Current Delegations | Current Task Delegations | Delegation History | Delegated Tasks | Business Processes allowed for Delegation

Begin Date	End Date	Delegate	Retain Access to Delegated Tasks in Inbox
No Data			

Manage Delegations

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- Under **Manage Delegations**, the **Business Processes allowed for Delegation** will display. This is where you will set up your delegate.

Manage Delegations Ashley S. Fisher

Business Processes allowed for Delegation

New Delegation

	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value="search"/>	<input type="text" value="search"/>	<input type="radio"/> For all Business Processes <input type="radio"/> For Business Process <input type="text" value="search"/> <input checked="" type="radio"/> None of the above Retain Access to Delegated Tasks in Inbox <input type="checkbox"/> Delegation Rule

enter your comment




Attachments

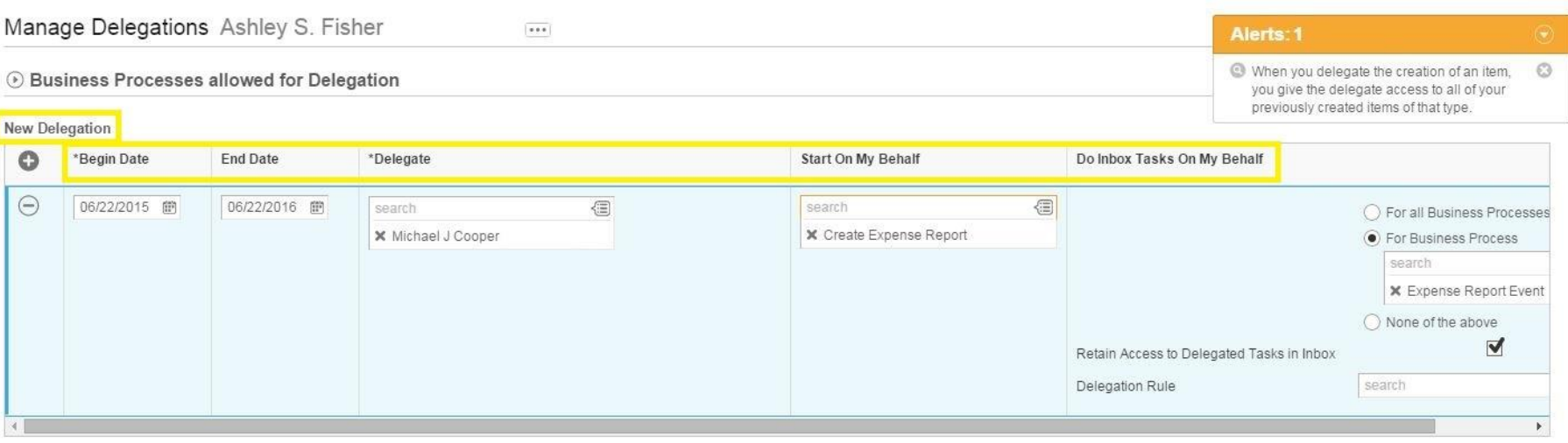
Drop files here

Submit Save for Later Cancel

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3. Under **New Delegation**:



- a. Under **Begin Date**, type or select the date you want the delegate’s task to start. Use the calendar icon if needed. 
- b. Under **End Date**, type or select the date you want the delegate’s task to end. Use the calendar icon if needed. 
- c. Under **Delegate**, type or select the name of the person you will be delegating the task to. For example, this is the person who you will be delegating expense reports to.
 - i. In the search box, type the first name and last name of the person and press Enter.
 - ii. You can also use the Prompt to select a name from the drop down menu. 
- d. Under **Start On My Behalf**, in the search box, select a task for the delegate to do for you.
 - i. Type in the task or use the Prompt to select the task. For example, type **Expense Report** and press Enter.
 - ii. When the task is selected, an **Alert** will appear in the top right corner. The **Alert** describes the meaning of the delegate role.



Manage Delegations Ashley S. Fisher

Business Processes allowed for Delegation

New Delegation

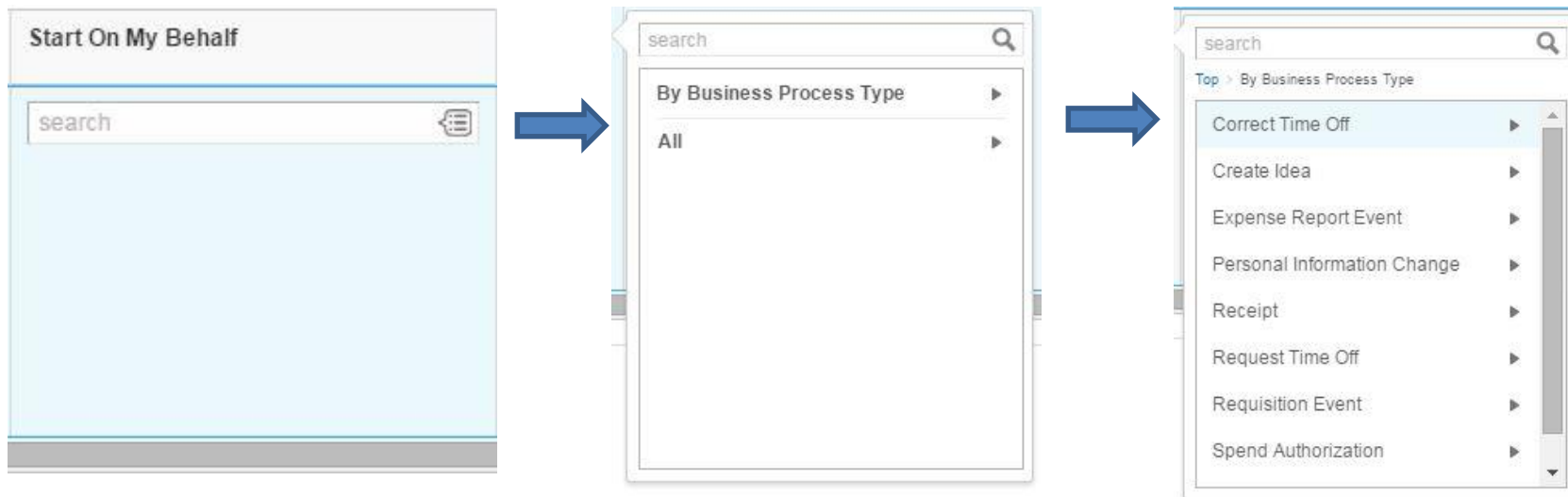
	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
	06/22/2015 	06/22/2016 	search x Michael J Cooper	search x Create Expense Report	<input type="radio"/> For all Business Processes <input checked="" type="radio"/> For Business Process search x Expense Report Event <input type="radio"/> None of the above Retain Access to Delegated Tasks in Inbox <input checked="" type="checkbox"/> Delegation Rule search

Alerts: 1

When you delegate the creation of an item, you give the delegate access to all of your previously created items of that type.

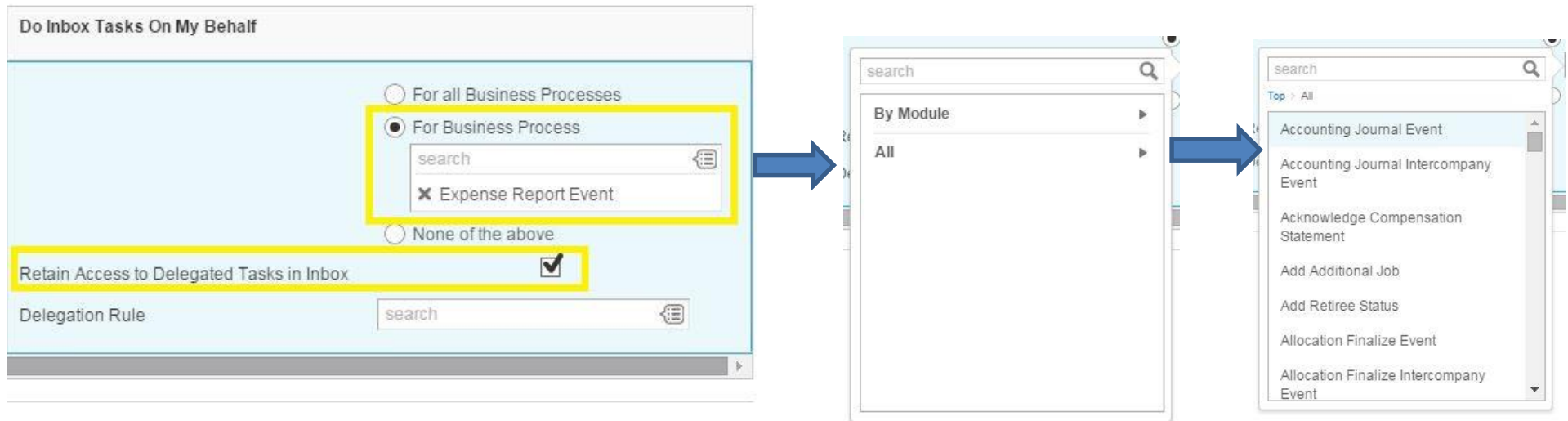
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- e. Under **Start on My Behalf**, more than one task can be selected.
 - i. Type the task or click the Prompt to select the task.
 - ii. If the Prompt is clicked, select the tasks from the drop-down menu.



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- f. Under **Do Inbox Tasks On My Behalf**:
 - i. Select **For Business Process**.
 - ii. In the search box, type the task or use the Prompt to select the task. For example, type **Expense Report** and press Enter.
 - iii. More than one **For Business Process** can be selected.



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g. For **Retain Access to Delegated Tasks in Inbox**:

- i. If **you do NOT want to see the tasks in your Inbox**, but want them **sent to the delegate** for further action, **do NOT click the box**. Only the delegate will see the tasks as they come in.
- ii. If you want tasks posted to **both your inbox and the delegate's inbox** for further action, **click the box to place a checkmark**. Both you and the delegate will see the tasks as they come in.

The screenshot shows the 'Do Inbox Tasks On My Behalf' configuration window. It features three radio button options: 'For all Business Processes', 'For Business Process', and 'None of the above'. The 'For Business Process' option is selected and highlighted with a yellow box. Below it is a search field containing 'Expense Report Event'. At the bottom, the 'Retain Access to Delegated Tasks in Inbox' checkbox is unchecked and highlighted with a yellow box. A green arrow points from the search field to the checkbox. The 'Delegation Rule' search field is visible at the bottom.

The screenshot shows the same 'Do Inbox Tasks On My Behalf' configuration window. The 'For Business Process' option is selected and highlighted with a yellow box. Below it is a search field containing 'Expense Report Event'. At the bottom, the 'Retain Access to Delegated Tasks in Inbox' checkbox is checked and highlighted with a yellow box. A green arrow points from the search field to the checkbox. The 'Delegation Rule' search field is visible at the bottom.

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- When you finish completing the **New Delegation** section, click **Submit** for final approval.

Note: No attachments are needed.

Manage Delegations Ashley S. Fisher

Alerts: 1

- When you delegate the creation of an item, you give the delegate access to all of your previously created items of that type.

Business Processes allowed for Delegation

New Delegation

+/-	*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
-	06/22/2015	06/22/2016	search X Michael J Cooper	search X Create Expense Report	<input type="radio"/> For all Business Processes <input checked="" type="radio"/> For Business Process search X Expense Report Event <input type="radio"/> None of the above Retain Access to Delegated Tasks in Inbox: <input checked="" type="checkbox"/> Delegation Rule: search

enter your comment

Attachments

Submit Save for Later Cancel

Establish Delegations– Use when you need to delegate a task

5. The next step in the approval process will display.

You have submitted [Delegation for Ashley S. Fisher](#)

on 06/22/2015 ⋮



Up Next



Kathleen R. Tetreault

Approval by Manager


Due Date 06/20/2015

▾ Details and Process


Done

Establish Delegations– Use when you need to delegate a task

6. You can check the status of the approval process by clicking **Details and Process**.
7. Click the **Process** tab to check the status.
8. Click **Done** when complete.

You have submitted [Delegation for Ashley S. Fisher](#) on 06/22/2015 

Up Next

 Kathleen R. Tetreault
Approval by Manager
Due Date 06/20/2015

Details and Process


For [Ashley S. Fisher](#)

Overall Process [Delegation for Ashley S. Fisher](#) on 06/22/2015

Overall Status In Progress

Due Date 06/20/2015

[Details](#) [Process](#)

Process History 2 items 

Process	Step	Status	Completed On	Due Date	Person	Comment
Request Delegation Change	Request Delegation Change	Step Completed	06/19/2015 08:43:28 AM	06/20/2015	Ashley S. Fisher	
Request Delegation Change	Approval by Manager	Awaiting Action		06/20/2015	Kathleen R. Tetreault (Manager)	

[Done](#) 