**Delegate**

**STEP 1**
- Click on your name in the upper right hand corner to access your "Inbox"
- Click on "Inbox" to open.

**STEP 2**
- Click the drop down arrow and select "My Delegations"
STEP 3
- The My Delegations screen appears
- Click the “Manage Delegations” button

STEP 4
- Select a begin and end date for the delegation
- In the “Delegate” field, select a delegate from the prompt

Delegation begins and ends according to the time zone of the delegator. If the delegator and delegate are in the same time zone (i.e., EST) then the delegation will begin and end at the specified times in EST. However, if the delegator is on PST, and the delegate is on EST then the delegation will begin and end at the specified times in PST.
STEP 5

“Start on My Behalf”

- Leave the field blank if you are only delegating Inbox tasks

Or

- Select from the prompt for delegating Initiating Actions for a business process only, not Inbox tasks.

STEP 6

- Scroll right to see the “Do Inbox Tasks On My Behalf” section, select whether to delegate Inbox tasks:
  1. For all Business Processes.
  2. For a specific Business Process.
  3. None of the above (removes the ability to do Inbox tasks while retaining the ability to initiate specified business processes on your behalf).
STEP 6

- For Business Process selection:
  1. You can choose from the prompt

Or

2. Type in part of your selection to narrow your options. If you know it, you can also type out full name of the process.

STEP 7

- Note: Select Retain Access to Delegated Tasks in Inbox if you want to get notifications and access the tasks from your own Inbox as usual. If you retain access, then either you or your delegate can complete each task. You can also apply a Delegation Rule to the business processes you’re delegating.

- Click submit when finished entering.

Help? Please call Lorin @ 973-655-2045
STEP 6

- To add more delegations, add a row to the delegations grid by clicking the + icon, and then repeat the steps.

- Click Submit once complete