Establish Delegations – Spend Authorizations and Expense Reports
Use when you need to delegate a task

How to Access Delegations
Note: All Asterisks (*) need to be completed.

Access the My Delegations task

1. The My Delegations page will display:
   a. Under the Current Delegations tab, click Manage Delegations.
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2. Under **Manage Delegations**, the **Business Processes allowed for Delegation** will display. This is where you will set up your delegate.
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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. This is the person who you will be delegating spend authorizations and 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. Type **Spend Authorization** and press Enter. 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.
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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.

Your screens and processes may vary from those described here.
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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.
      1. Type **Spend Authorization** and press Enter.
      2. 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.

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

Note: No attachments are needed.
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5. The next step in the approval process will display.

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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.

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9. The Manager will need to approve the delegation.
10. Click Approve.
11. The **Success** page will display.
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12. The Overall Status will state Successfully Completed.
13. Click Done.
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14. The Delegate will receive a Notification.
15. The Delegate is notified about the Delegated Task(s) from the Delegator.