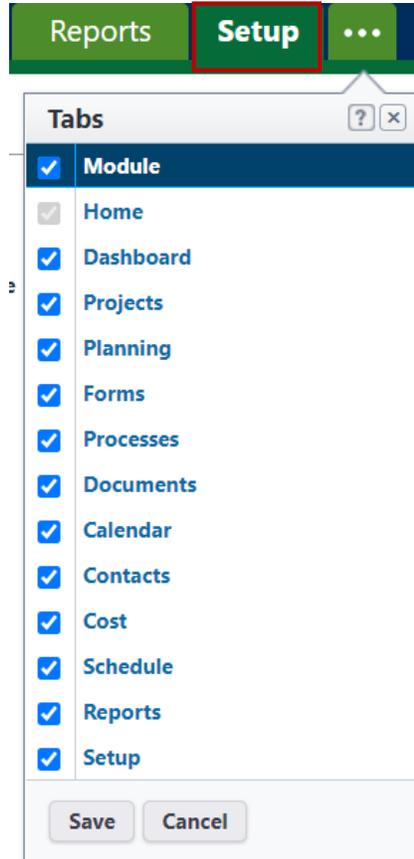


e-Builder: How To Delegate as a User or a Process

1. Access Delegation – this gives someone all your authority for a limited amount of time. They will see and be able to act on your processes, forms, and projects.
2. Process Delegation – this hands off the process to someone else so they can take your action. After they do, it resumes normal routing for that process.

User Access Delegation:

1. Click Setup (if needed, Click the ... to add the Setup tab)



- a.
2. Expand Personal Information and click Access Delegation

My Settings

- > Membership
- ▼ Personal Information
 - My Profile
 - Change My Password
 - Access Delegation**

a.

- Select the user you wish to give access to and set the duration, then click Grant

Grant Access
 Request Access

* Select User: Filter Users by Role

* Access Duration: Start Date & Time

End Date & Time

Notes:

- The access should show up in the table above. If needed, you can cancel their access early here by clicking Revoke. The next time this user logs in, they can select to login as you. **Note: when they take an action it will show up as you, the user who gave the access, taking the action in the process history.** You are still able to login while Access Delegation is in place.

Action	Current Status	Access Type	User	Start Date	End Date	Notes
	Expired	Granted Access From	Test Ext - GC	03.04.2019 5:00 am	03.18.2019 9:30 am	
	Expired	Granted Access From	Test Ext - Consultant Engineering	03.04.2019 7:30 am	03.18.2019 11:00 am	
	Expired	Granted Access From	Test External Contractor	05.01.2019 10:30 am	05.31.2019 5:00 pm	
Revoke	Active	Granted Access To	Veronica High	11.25.2020 10:00 am	11.30.2020 8:00 am	

a.

Process Delegation

- This is separate from Access Delegation and can be done at any time.
- On the process, click Delegate

Pay App (PAYAP) - 5

a.

- Select the User and then type a message, then click Delegate Authority

Delegate Full Authority

Delegate Authority
Cancel

* Select a Role:

* Select a User:

Message:

"Segoe UI", A... | 12px | **B** | *I* | U | abc | | | | | | | | | | | |

Brian, could you please review and approve?

a.

4. They will receive an email. A comment will show up and the current actors will be updated:

Pay App (PAYAP) - 5

Delete

Accept
Decline
Complete
Take Action
Check Spelling

Project: Z_Test_DeleteMe

Process Document: PAYAP - 5

Current Workflow Step: [Show History](#) | [Current Actors](#)

* Subject: Fiscal Analyst Update

Status: In Progress

Project Number: 123456789

Overall Due Date: 12/31/2023

Step Due Date: 12/31/2023

Details
Comments (1)
Attachments (0)
Attached To (0)

Actor	Action Taken	Actor Type
Alford, Brian		Delegated
Sherman, Peter		Step Actor

Make Private
Private
Comment

Delegated the work on step Fiscal Analyst Update to Brian Alford (City of Raleigh)

Test, please ignore

a.