GENERAL

Delegating Expense Reports (and Other Tasks)

Last updated June 3, 2020

Grant another CCA staff member access to initiate specific tasks on your behalf. The tasks you may delegate depend upon your role, but common delegations include permission to create and submit expense reports on one's behalf.

Delegations may be useful when you are out of the office on vacation, leave, or any other reason.

Steps

1) Run the My Delegations report.

2) Click the **Manage Delegations** button.

- Read the instructions at the top of the following screen before proceeding.

3) Use the **plus icon** to add a new row (if you have any other current delegations, you may need to do so).

4) Enter the **Begin Date** and **End Date** for the delegation.

- If you want to delegate a task perpetually, leave **End Date** blank (generally not recommended).

5) In the **Delegate** field, search and select the person you'd like to delegate your inbox to.

6) In the **Start On My Behalf** dropdown, select one or more tasks you would like the delegate to be able to initiate on your behalf.

7) If the delegate needs to manage any approval or follow-up task(s) from your inbox, fill in the **Do Inbox Tasks on My Behalf** column accordingly:

Under **For Business Process**, select the specific inbox tasks/items your delegate will need to access.

- Make sure to check the **Retain Access to Delegated Tasks in Inbox** box so you still receive your same inbox items while delegated.
- If you are delegating a specific business process, select a **Delegation Rule** to control which *types* of inbox items the delegate will receive for that process.
- If no inbox access is needed, select **None of the above**.

8) Click **Submit**. The delegate will receive a notification.

9) Click **Done** to exit the task.