

Delegation Instructions

Use the **Delegate Task** to add a reviewer or certifier to the effort certification document. The **Delegate Task** allows you to add reviewers and certifiers from different schools and departments to prepare or certify an effort document. Use the **Delegate Task** if;

• The *Save for Later* button was clicked, and the ECD is now locked in your inbox, or if the assigned reviewer or certifier is missing from the <u>waiting action</u> *All Person* list in the effort certification document *Process History* tab. See the below *(Process History)* tab example.

Example

ummary Aggregate Details	Positions Organizations Process History	,				
Process History 6 items		-				Tur
Process	Step	Status	Completed On	Due Date	Person (Up to 5)	All Person
Effort Certification	Effort Certification	Step Completed	05/27/2022 06:35:01 PM		Maria Hernandez	1
Effort Certification	Administrative Review	Awaiting Action			Andres Chan (Effort Certification Manager	
19 items	··· ×					
19 items All Persons Andres Chan (Effort Certification R	····· × 砂垣田室 ion Manager (Unconstrained))					
19 items All Persons Andres Chan (Effort Certificati Ben Bell (Effort Certification R	weiwer)					
19 items All Persons Andres Chan (Effort Certificati Ben Bell (Effort Certification R Carmen Hernandez (Effort Cer	·····································					
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19 items All Persons Andres Chan (Effort Certification R Ben Bell (Effort Certification R Carmen Hernandez (Effort Certifica Caroline Sakai (Effort Certifica Catherine Velazquez (Effort Certifica	wiewer) tification Reviewer) etrification Reviewer) etrification Reviewer)					
19 items All Persons Andres Chan (Effort Certification R Carmen Hernandez (Effort Cert Caroline Sakai (Effort Certifica Catherine Velazquez (Effort Certifica Janet Stoeckert (Effort Certifica	wiewer) tion Manager (Unconstrained)) eviewer) tification Reviewer) etification Reviewer) etification Reviewer) etification Reviewer)					
19 items All Persons Andres Chan (Effort Certification Ben Bell (Effort Certification R Carmen Hernandez (Effort Certifica Caroline Sakai (Effort Certifica Catherine Velazquez (Effort Certifica Janet Stoeckert (Effort Certifica 4						

Below are two methods of locating the Delegate Task.



Delegation Instructions

Method 1

Step#1 Open the effort certification document (ECD) using the <u>Inbox</u>.



Step#2 Click the *Task Action* icon located in the document's upper right corner, then click the *Delegate Task.*





Delegation Instructions

Step#3 Click the **Proposed Delegates** radio button, then enter the 7-digit employee ID or employee name to filter the associate to whom the ECD is being delegated. Next, enter a comment into the **comment box** and click the **Submit** button.

Delegate Task				
19 day(s) ago - Due 06/	27/2022			
Delegating Worker	Maria Hernandez			
Business Process	Effort Certification: S01 for Maria Bolshakova for 08/01/2021 - 12/31/2021			
Task	PI Certification of Active Student 2			
Current Delegates	(empty)			
1 🗪	★ O Proposed Delegates 🛛 🗙 Andres Chan … 📰			
	Stop Current Delegations			
enter your	comment 3			
Submit	Save for Later Cancel			



Delegation Instructions

Step#4 Once your manager approves the delegation, the effort document will appear in the assigned associate's inbox. The associate will have to switch employee profiles to access the assigned document.

You have submitted	Ĺ
Up Next: Andres Chan Approval by Manager	

Method 2

Step#1 Open the effort certification document (ECD) using the *Find Effort Certifications* module.

Instructions	Primary lookup report certification type, gran certification is past du	for effort certifications. Allows user t t, grant Pl, whether an employee is te e. Report displays various details abo	to search effort certification rminated, whether an effort out the effort certification ar	is by a date range, employee, status, effort certification has been changed, or whether an effor nd effort certification event.
	All prompts are option	al.		
Effort Certifica	ation Date From	07/01/2021	> Enter the eC	ert
Effort Certific	ation Date To	89/38/2821	Period Dat	te
Organization			:=	Enter the employee
Employee		× Maria Bolshakova \cdots	=	name or 7-digit ID.
Effort Certific	ation Type		:=	
Effort Certification Status		× In Progress	:=	Select these ECD
		× N/A × Not Started		status.
Grants on Effo	ort Certification		:=	
Grant Principa	al Investigator		:=	
Effort Certific	ation Reviewer(s)		:=	
Effort Certific	ation has Costed Chang	es 🗌		
Worker is Terr	minated			
Past Due				
Filter Nan	ne			
Manage Fi 5 Saved Fil	Iters			
	Click O	к		



Delegation Instructions

Step#2 *Click* the (...) ellipsis to open the submenu, select *Business Process*, and click on the *Delegate Task*.

l item									
Effort Certification	Effort Certificati Event	Employee	Employe	e ID Employee Type	Worker is Terminated	Effort Certification Workday ID	Effort Certification Status	Туре	Start Date
Q02 for Hittu Matta for 10/01/2021 - 12/31/2021	٩	Actions		Event				E PDF	× 01/202
		Business Process		Add Approvers Confirmation View	Jo2 for I	Hittu Matta for 10/01/2021 - 1	12/31/2021		
		Integration IDs	,	Delegate Task Full Process Record	ər Hittu M	1atta for 10/01/2021 - 12/31/202	1		
	4			Reassign This Task Test Rule	gress				
				View Definition	/2022 06	:35:01 PM			
				View Remaining Proce	ess				

Step#3 Click the *Proposed Delegates* radio button, then enter the 7-digit employee ID or employee name to filter the associate to whom the ECD is being delegated. Next, enter a comment into the *comment box* and click the *Submit* button.

19 day(s) ago - Due 06/:	27/2022		
Delegating Worker	Maria Hernandez		
Business Process	Effort Certification: S01 for M	aria Bolshakova for 08/01/2021 -	12/31/2021
Task	PI Certification of Active Stud	ent 2	
Current Delegates	(empty)		
1 🗪 🖡	Proposed Delegates	× Andres Chan …	:=
	Stop Current Delegation	ns	
enter your	comment		
		3	
4		3	
4		3	



Delegation Instructions

Step#4 Once your manager approves the delegation, the effort document will appear in the assigned associate's inbox. The associate will have to switch employee profiles to access the assigned document.

Q Search	
You have submitted	×
Up Next: Andres Chan Approval by Manager View Details	J
VIEW Details	