

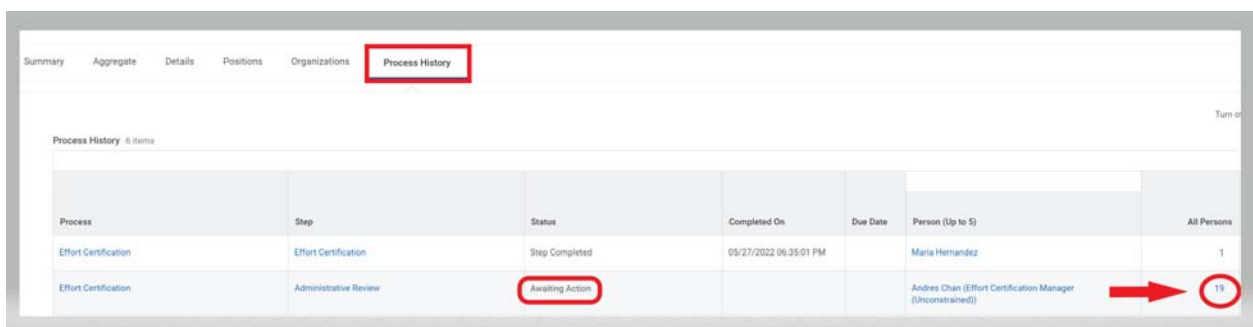
Effort Certification Document

Delegation Instructions

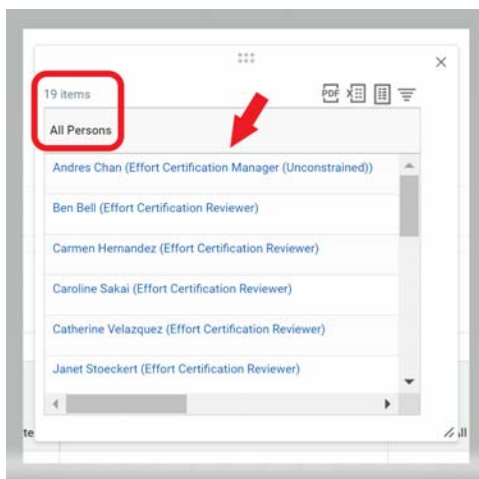
Use the **Delegate Task** to add a reviewer or certifier to the effort certification document. The **Delegate Task** allows you to add reviewers and certifiers from different schools and departments to prepare or certify an effort document. Use the **Delegate Task** if;

- 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 waiting action **All Person** list in the effort certification document **Process History** tab. See the below **(Process History)** tab example.

Example



Process	Step	Status	Completed On	Due Date	Person (Up to 5)	All Persons
Effort Certification	Effort Certification	Step Completed	05/27/2022 09:35:01 PM		Maria Hernandez	1
Effort Certification	Administrative Review	Awaiting Action			Andres Chan (Effort Certification Manager (Unconstrained))	19



Below are two methods of locating the **Delegate Task**.

Effort Certification Document

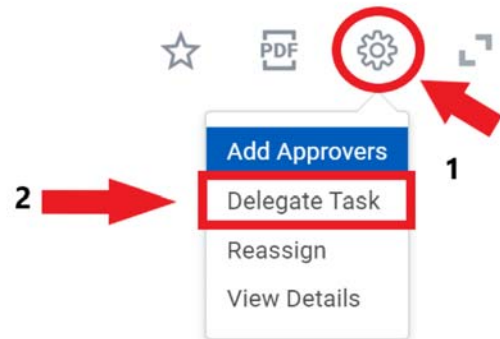
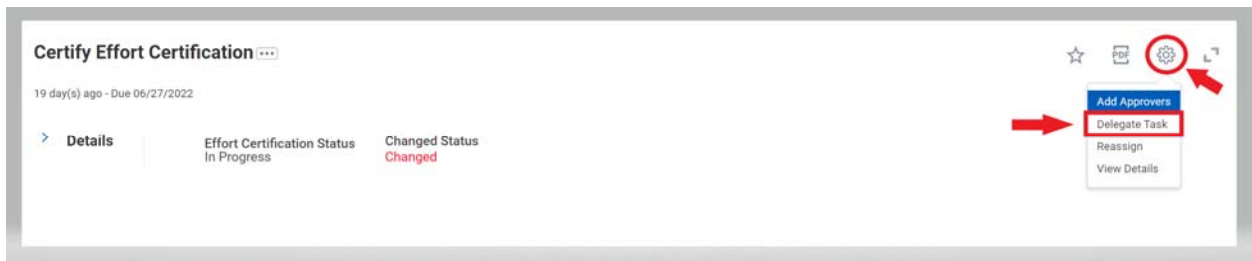
Delegation Instructions

Method 1

Step#1 *Open* the effort certification document (ECD) using the Inbox.



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



Effort Certification Document

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

Current Delegates (empty)


1 → *

☒ Proposed Delegates

× Andres Chan ...

2

☐ Stop Current Delegations



enter your comment

3

4

Submit

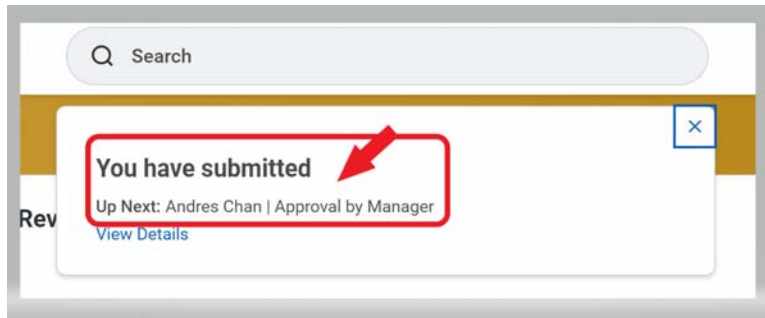
Save for Later

Cancel

Effort Certification Document

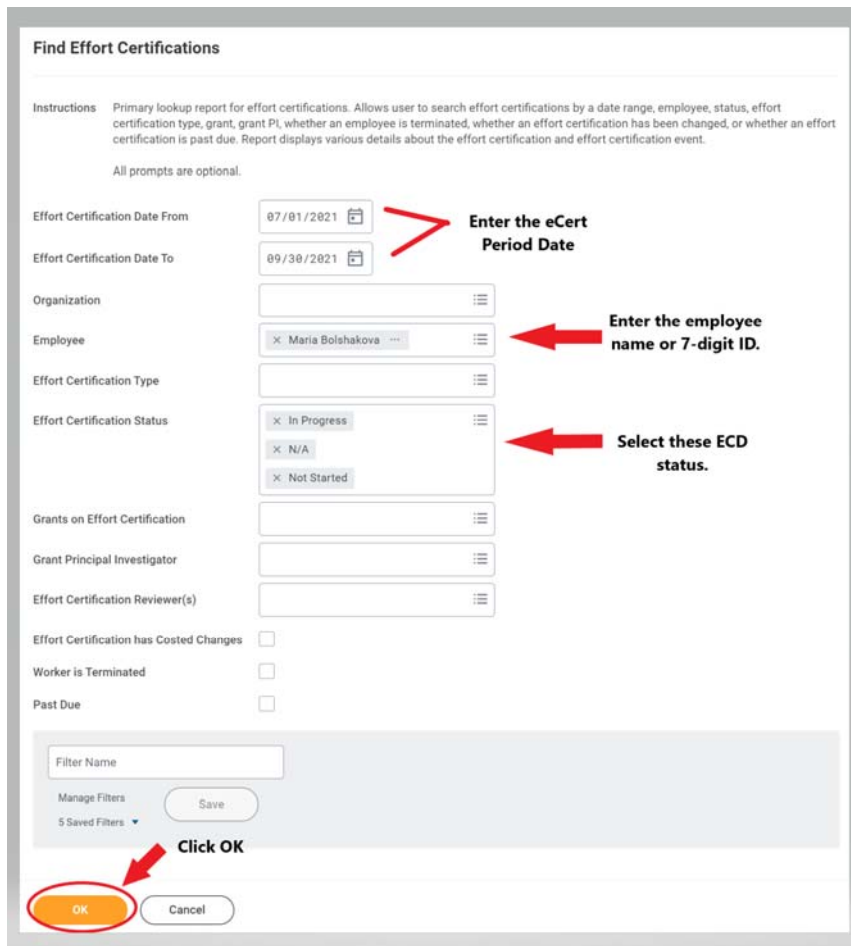
Delegation Instructions

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.



Method 2

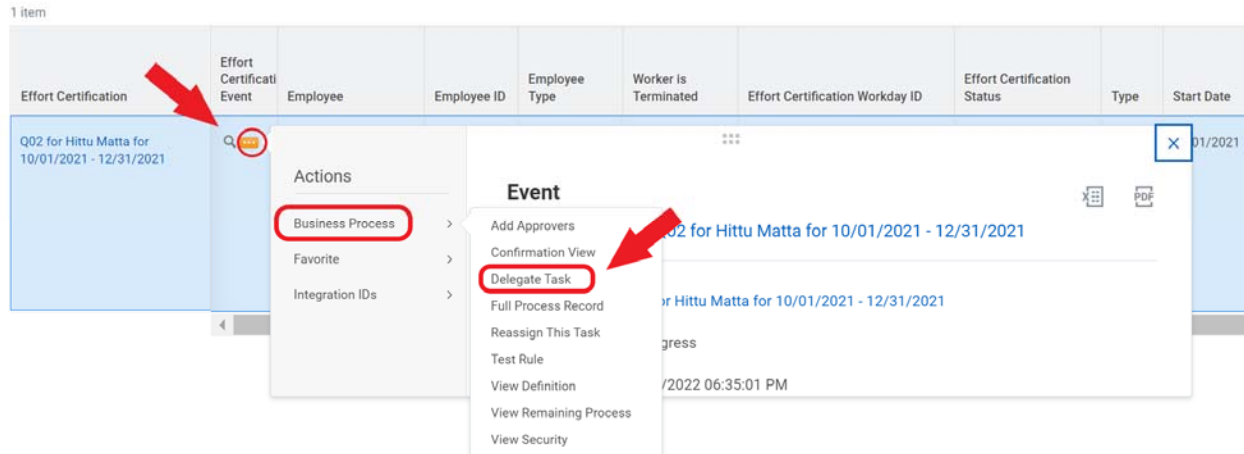
Step#1 *Open* the effort certification document (ECD) using the [Find Effort Certifications](#) module.



Effort Certification Document

Delegation Instructions

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



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

Current Delegates (empty)

1


☒ Proposed Delegates

×

Andres Chan

...

☐ Stop Current Delegations



3

4

Submit

Save for Later

Cancel

Effort Certification Document

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.

