

How to Delegate Tasks

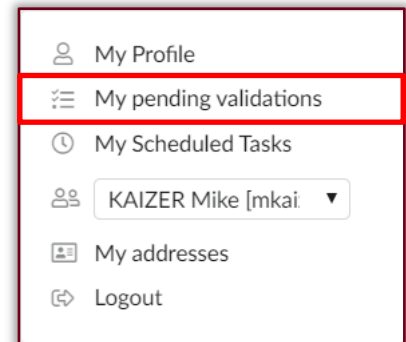
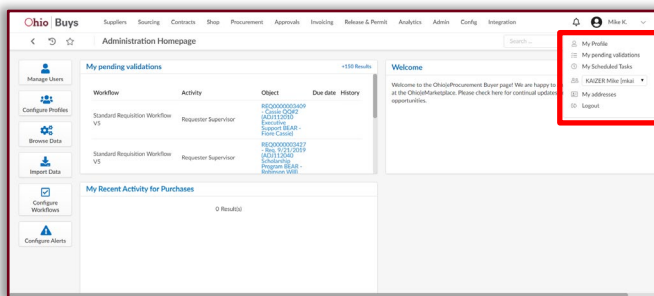
Step-by-Step Instructions for Delegating Tasks on the Pending Validations Page

When a user is out of the office and not able to take action within Ohio Buys, their pending and future tasks can be delegated to another user. There are two ways agency admins can delegate tasks to another user:

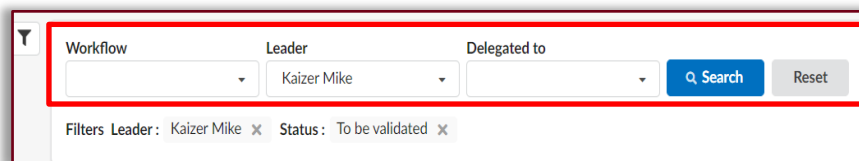
1. **Via the My Pending Validations Page:** Used for existing tasks (e.g., a purchase requisition approval) that need to be assigned to a different user.
2. **Via the My Profile Page:** Used when a user is out-of-office or would like to set up a delegate for approvals.

▲ In order to be delegated a task, a user must have the Additional Approver role.

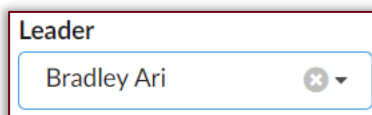
Log in to Ohio Buys, navigate to your User Name drop-down menu in the upper right hand corner of the page and click on **My pending validations**.



- a) While on the My Pending Validations page, a complete listing of workflow items will be visible. Towards the top of the page, there is an option to refine your search results.



- b) The Leader filter will automatically be applied and default to your name. Delete the filter by selecting the **Delete** (✕) icon next to your name. Input the name of the user whose tasks need to be delegated and select their name from the list.



▲ You can only delegate workflow items from one user to another if both users have the same user role. For example, workflow items can not be delegated from a Catalog Analyst to a Contract Analyst, but from one Catalog Analyst to another Catalog Analyst.

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2

- c) To further refine the type of Workflow, navigate to the box titled Workflow and click the **Selector** (▾) icon to see a list of possible options. Choose your applicable option.

Workflow

▾

- d) Once you choose a specific Workflow, a field titled Activities appears, which enables you to further refine your search. Click on the **Drop-Down Arrow** (▾) to see a list of possible options. Activity defines the current step within the workflow where the user has been pulled in. Choose your applicable option.

Activity

▾

- e) Click the **Search** button to process your filters and see your results.

Search

3

- a) On the search results page, scroll to the Workflow item you want to delegate to another user (e.g., Standard Requisition Workflow V5 – #3417). Click the **Checkbox** (☐) next to the Workflow item(s) you want to delegate.

<input type="checkbox"/>	Workflow	Requestor	#	Object	Activity	Performer	Forwarded on	Action's date (UTC-4)	Status	Due date	Delegated to	Initial performer	History
<input checked="" type="checkbox"/>	Standard Requisition Workflow V5	FIORE Cassie	3417	REQ0000003417 - Req. 9/18/2019 (AD112010 Executive Support BEAR - Fioire Cassie)	Agency Procurement Approver	KAIZER Mike	9/18/2019		<div></div>			KAIZER Mike	

- b) Click **Delegate** at the top of the page.

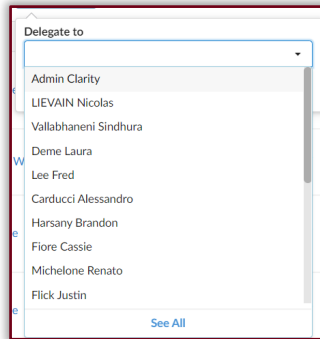
Delegate

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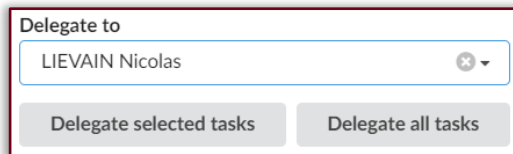
4

A pop-up titled Delegate to appears:

- a) Search for the user that you wish to delegate the task to using their name in Ohio Buys. One or multiple names can be selected by clicking the name(s).



After selecting a user, their name will populate in the Delegate to field:



5

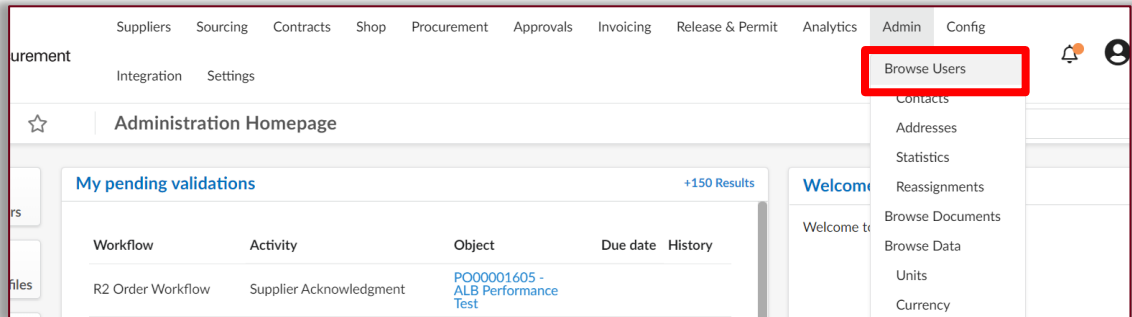
- a) Click **Delegate selected tasks** to delegate the selected task(s) to the chosen user
- b) Click **Delegate all tasks** to delegate all tasks within the search results to the new user listed in the **Delegate to** field.
- c) Once you click Delegate, the Workflow item will show who the task has been delegated to.

<input type="checkbox"/>	Workflow	Requestor	#	Object	Activity	Performer	Forwarded on	Action's date (UTC-4)	Status	Due date	Delegated to	Initial performer	History
<input type="checkbox"/>	Standard Requisition Workflow V5	FIORE Cassie	3417	REQ0000003417 - Req. 9/18/2019 (ADJ112019 Executive Support BEAR - FIORE Cassie)	Agency Procurement Approver	KAIZER Mike	9/18/2019				LIEVAIN Nicolas	KAIZER Mike	

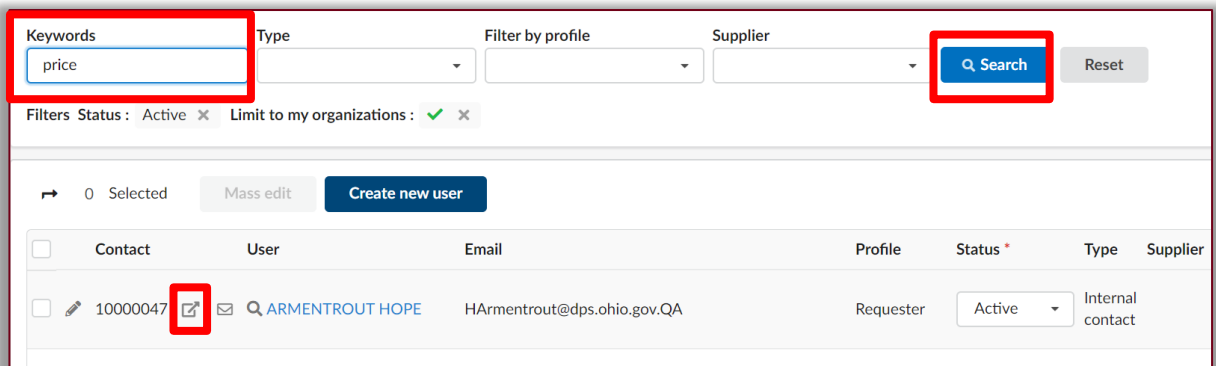
Step-by-Step Instructions for Delegating Tasks on the User Profile Page

- ▲ If a user is out of the office for an extended period of time, that user's profile settings can be adjusted so that all future tasks are delegated to another user.

From the Main Menu Navigation bar, the Agency Admin can navigate to **Admin** and select **Browse Users**.

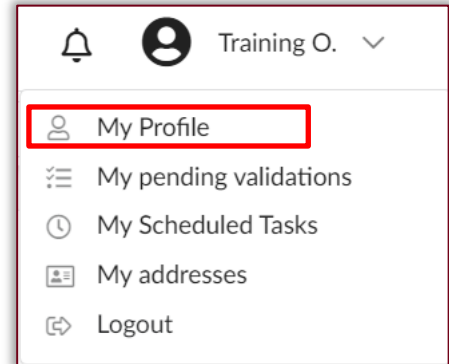
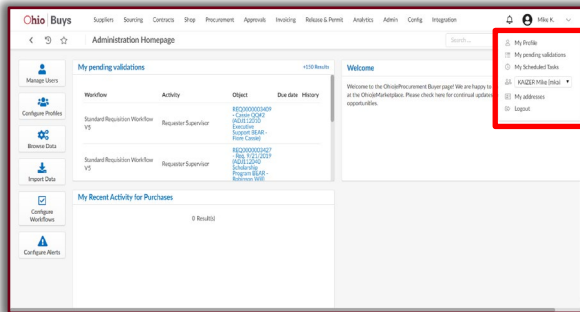


Type the user's name in the **Keywords** field and select **Search**. Select the **Log in with this user** icon next to the user's **Contact** number to log in as that user.



Step-by-Step Instructions for Delegating Tasks on the User Profile Page

Navigate to the User Name Drop-Down menu in the upper right hand corner of the page, and click on **My Profile**.



In the **Delegation** section, complete all of the necessary fields:

- Select the name of another user in the **Give my approval workflow tasks to** field
- Select a date to start delegating tasks in the **From** field
- Select a date to stop delegating tasks in the **To** field. If the delegation is supposed to occur indefinitely, then leave this field blank.

A screenshot of the 'Delegation' section in the user profile page. The section has a title 'Delegation' and a 'Save' button at the top left. Below the title, there are three fields: 'Give my approval workflow tasks to' (labeled A), 'From' (labeled B), and 'To' (labeled C). The 'Give my approval workflow tasks to' field is a dropdown menu. The 'From' and 'To' fields are date pickers. The 'To' field is highlighted with a yellow box. Below these fields, it says '0 Result(s)'.

Click **Save** at the top of the page.

A blue button with the text 'Save' and a small icon of a document with a checkmark.