How to Delegate Approvals

Step-by-Step Instructions for Delegating Approvals

Log into Ohio eProcurement, navigate to your User Name Drop-Down Menu in the upper right hand corner of the page, and click on My open workflow tasks.

1. a) While on the My Open Workflow Tasks 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.
   
   You may see options in the drop-down menus (e.g., Workflows, Activities) that are not part of Ohio eProcurement's initial release, but will be available in future releases.

2. b) The Leader field will automatically default to your name:
   
   If you do not delete your name before you click Search, then your results will only show workflow items delegated to you. As a result, you will not see workflow items delegated to others users and you will be unable to delegate their workflow items to other users.

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

3. c) To further refine the type of Workflow, navigate to the box titled Workflows and click the drop-down arrow (▼) to see a list of possible options. Choose your applicable option.

4. 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. Choose your applicable option.

5. e) Click the Search button to process your filters and see your results.
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a) On the search results page, scroll to the Workflow item you want to delegate to another user (e.g., Catalog Upload Approval – LIGHTHOUSE SOLUTIONS GROUP – 7). Click the Check Box (✓) next to the Workflow item you want to delegate.

! You can delegate all of a user’s tasks using the selector at the bottom of the page.

b) Scroll the bottom of the page to find the box titled Delegate to. Click on the Ellipses (…) next to the Delegate to box.

A pop-up titled Users Allowed for Delegation appears:

a) Towards the top of the pop-up, there is an option to refine your search results (e.g., the name of the user in the field Keywords). Click Search once you have filtered accordingly.

b) Click on the check box next to the applicable user and then click Close.

a) Once you click on the check box next to the user you want to delegate a Workflow item to, it shows next to the box titled Delegate to, which is towards the bottom of the page.

b) Scroll towards the top of the page and click Delegate.

c) Once you click Delegate, the Workflow item will show who the Workflow has been delegated to.

If you have questions or need additional assistance, please contact Ohio Shared Services Contact Center via e-mail (ohiosharedservices@ohio.gov) or phone (877-644-6771).