Job Aid: Assigning Delegates (Supervisor)

Purpose

The purpose of this job aid is to guide you through the step-by-step process of using the delegate feature within TMS. A delegate is another user who you identify to act on the work that you need to complete in the user interface.

When you identify a user as a delegate through the Delegates area in your **Options and Settings** screen, the system adds that user's name to the Delegate list. Typically, you identify a user as a delegate when you want the user to perform some of your tasks. You can use the Delegates area to add or edit the permissions for a delegate, which you might want to do, for example, if you plan to take an extended holiday or cannot access the user interface for some reason.

In this example, Marcus Hoff will be going on vacation for two weeks. He has a handful of employees who report to him. He has decided to deem his direct supervisor, Aaron Miller, as a delegate to perform all necessary actions in TMS.

In Task A, you will complete seven steps to add a delegate. In Task B, you will edit delegate permissions by completing six steps.

Note: Your administrator determines the list of permissions that you can delegate; you must decide to grant some, all, or none of those permissions for each delegate.

Task A. Assign a Delegate

1. From the Learning Plan page, click the **Options and Settings** easy link.
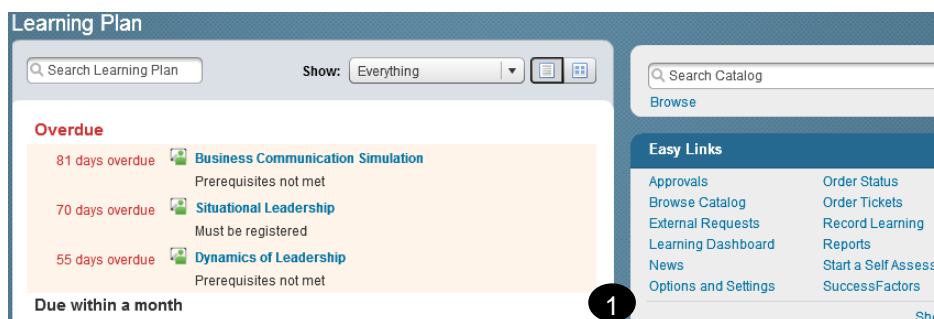

2. Click **Add** in the Delegates area on the Options and Settings screen.

3. Using the type-ahead feature, enter the last name of the user you wish to identify as a delegate for your records.

4. The system displays a matching list of users. Select the user you wish to assign as delegate.

or

5. Click the **Advanced Search** link to search for specific users using the search screen.
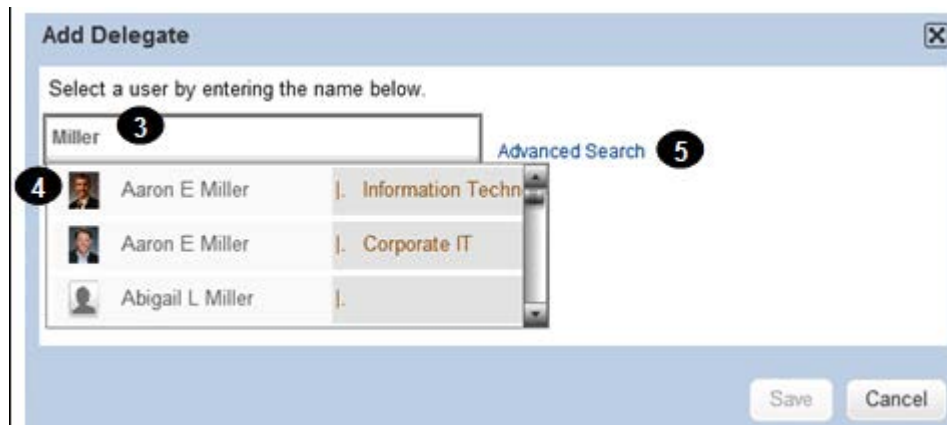

6. Once selected, select the level of permissions for the delegate:

- Inactive Delegate: selected user is inactive; no permissions are active.

- Predefined Permissions: provide selected user with all of the workflows that you have currently.

- Selected Permissions: select the workflows (from the set of workflows that you currently have) that you want to grant to the selected user.

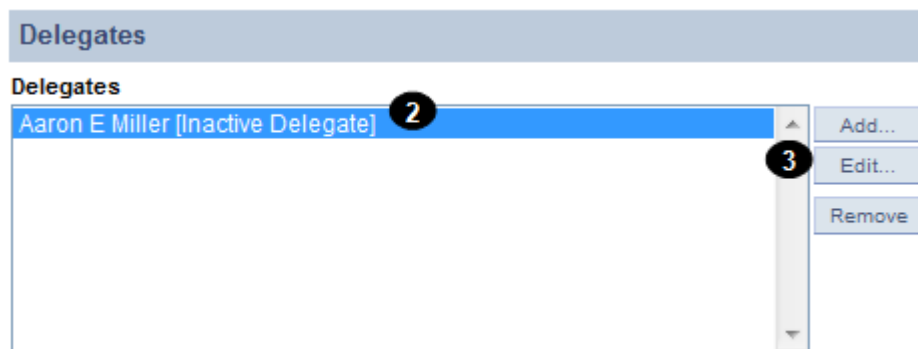7. Click **Save**. The delegate is now selected and permissions are assigned.
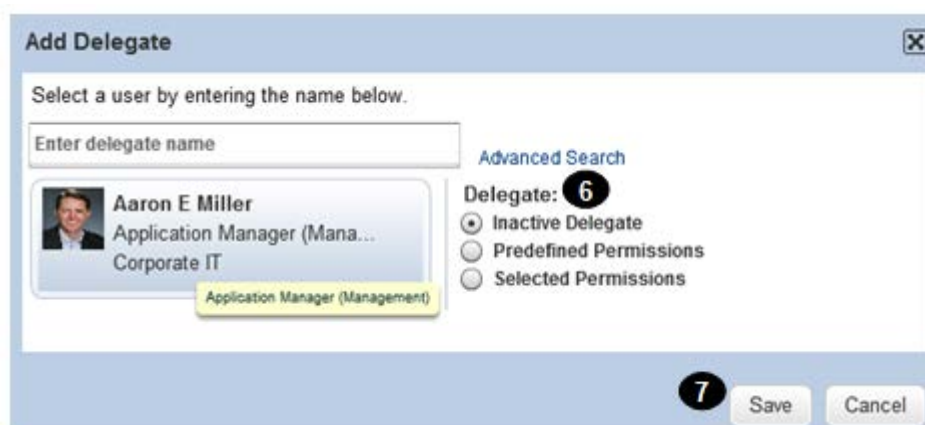
Task B.   Edit Delegate Permissions

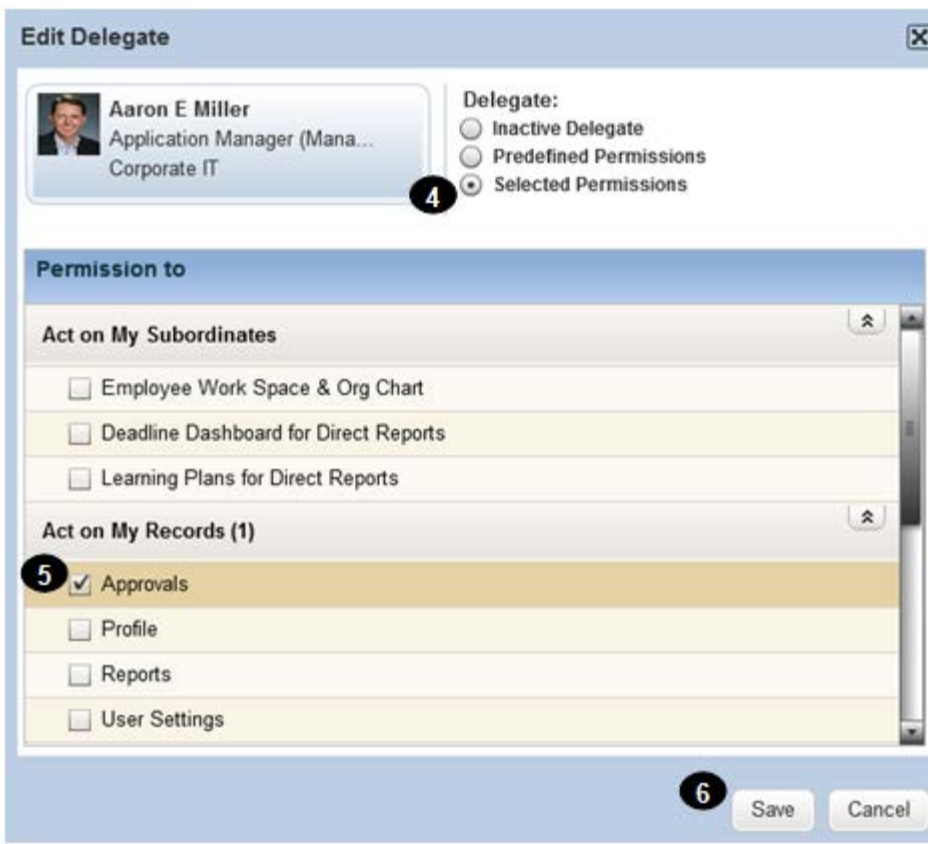1. From the Learning page, click the **Options and Settings** easy link.
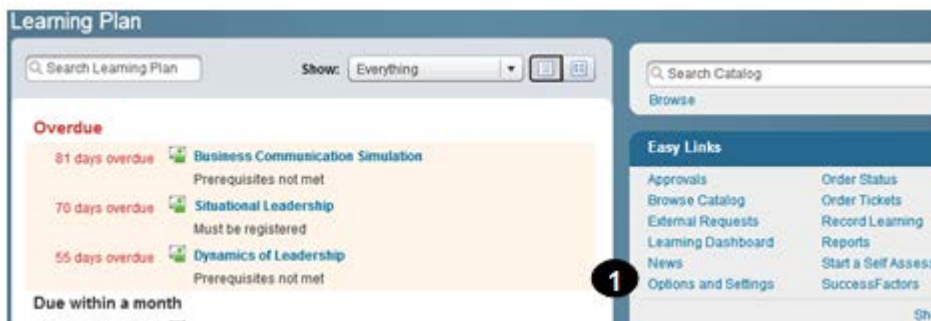
2. Select the delegate you wish to edit.
3. Click **Edit**.

4. Select appropriate permissions. In this example, we changed the delegate's permissions from predefined to selected permissions.

5. Select specific permissions to assign the delegate.

Note: Displayed permission options may differ from those shown on your screen. Use the scroll bar to view all permissions available. Use the expand and collapse buttons (⩔) to control the list view.

6. Click **Save**. A window will appear displaying the saved changes.