

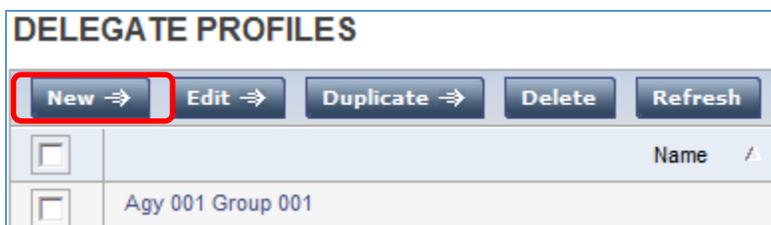
Delegate profile setup is a two-step process you must complete for each agency/division in your agency. This process adds the available managers to the Temporary Delegation pane.

Step 1 - Delegate Profile Setup

- 1 From the **Related** Items pane, select **Setup**. Then select **Delegate Profiles**.

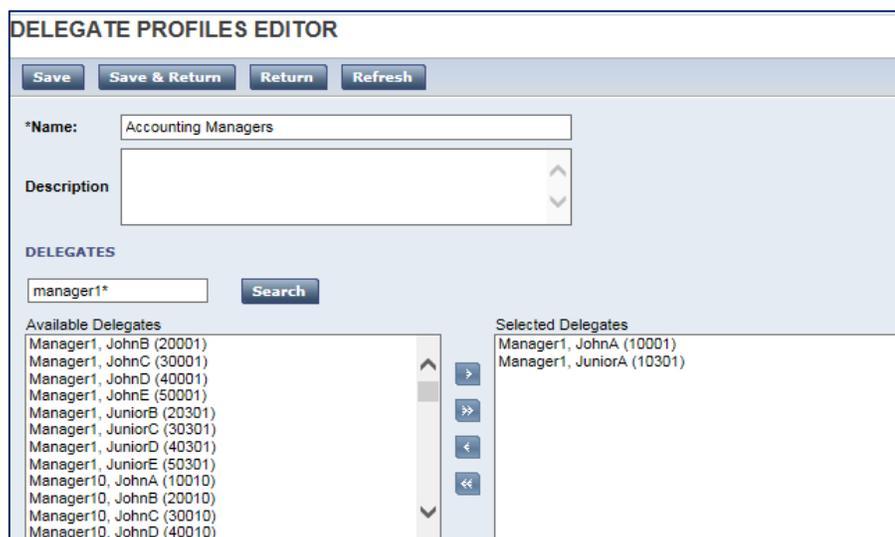


- 2 Select **New** from the **Delegate Profiles** screen.



- 3 Enter the name of the profile in the **Name** field.

- 4 Select the **Search** button to retrieve a list of manager delegates. To narrow the search, enter a letter or letters of the last name in front of the asterisk (*), then select **Search**.



- 5 The **Available Delegates** display. Select the desired delegate(s), then the right arrow button  to move from **Available Delegates** to **Selected Delegates**.

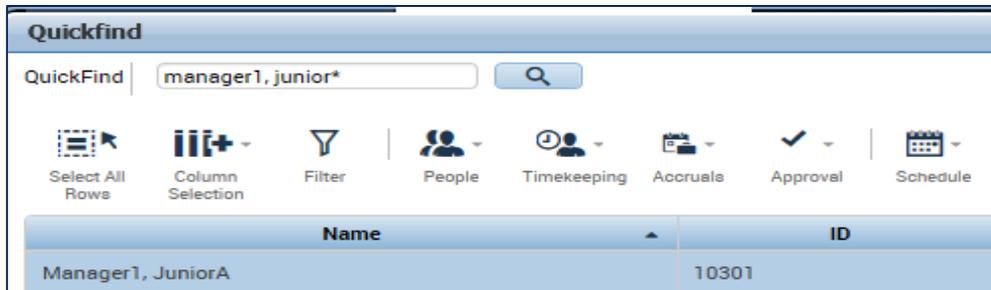
Note: To select more than one delegate, hold down the CTRL key and click on each name, then the right arrow button. Additionally, if a new manager is added, the agency administrator will need to manually add the new manager to the delegate profile.

- 6 Click the **Save** button.

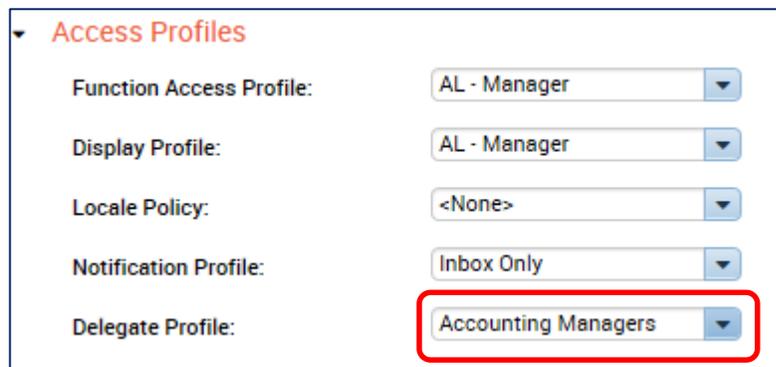
Step 2 - Assigning the Delegate Profile to the People Record

The Delegate Profile must be added to the manager's People Editor in order to be used.

- 1 From the Agency Administrator workspace, select **Related Items>QuickFind**.



- 2 Locate manager(s) to be added to the delegate profile.
- 3 Highlight the manager name(s).
- 4 Select **People>Edit**. The People Editor displays.
- 5 Select **Job Assignment** tab.
- 6 Select **Access Profiles**.
- 7 Select the delegate from the **Delegate Profile** drop-down.



- 8 Click the **Save** button.

Now the delegates are available on the Temporary Delegate pane, which must be complete at the time you wish to delegate. Refer to the **Manager Delegation for Requesting Backup Coverage** job aid for assistance.

Repeat for each manager.

If a manager needs to be removed from a delegate group, change the **Delegate Profile** in their People Record to reflect **Empty Profile**. Next, on the **Delegate Profiles Editor** screen, highlight the manager and move their name to the **Available Delegates** window using the arrow.

Note: A person cannot edit his/her own People Editor record. For those who need to be added to the new Delegate Profile, Step 2 - Assigning the Delegate Profile to the People Record will need to be completed by another Agency Admin.