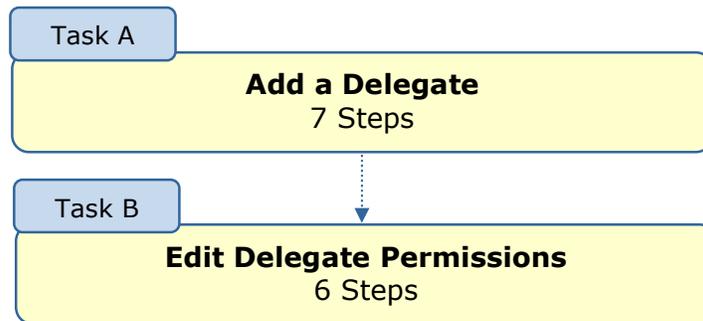


Job Aid: Assigning Delegates (Supervisor)

Purpose

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

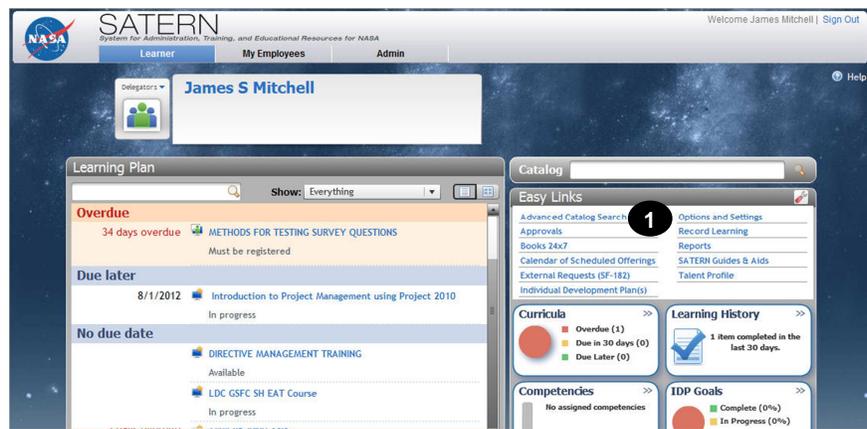
When you identify a user as a delegate through the Delegates area in your **Options and Settings** screen, the system adds that user's name to the Delegates list. Typically, you identify a user as a delegate when you want the user to perform some of your tasks. You can use the Delegates area to add or 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.

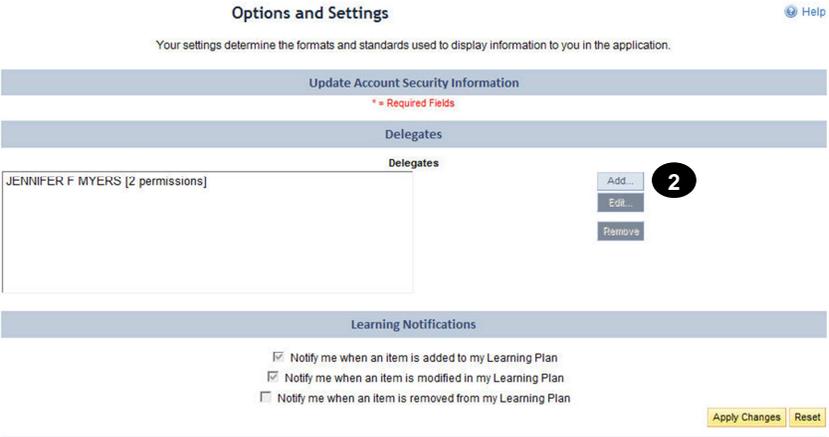
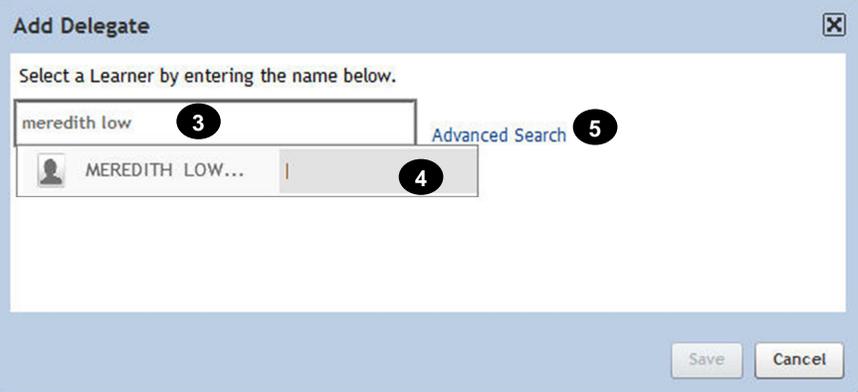


Note: Your administrator determines the list of permissions that you can delegate; you must decide to grant some, all, or none of those permissions for each delegate.

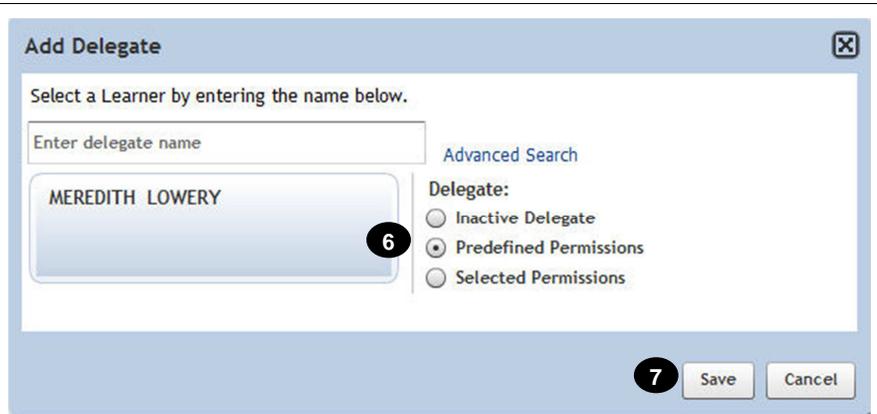
Task A. Assign a Delegate

1 From the Learner tab Home page, click the **Options and Settings** easy link.



<p>2 Click Add in the Delegates area on the Options and Settings screen.</p>	
<p>3 Using the type-ahead feature, enter the name of the user you wish to identify as a delegate for your records.</p> <p>4 The system displays a matching list of users. Select the user you wish to assign as delegate.</p> <p>or</p> <p>5 Click the Advanced Search link to search for specific users using the search screen.</p>	

- 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**.

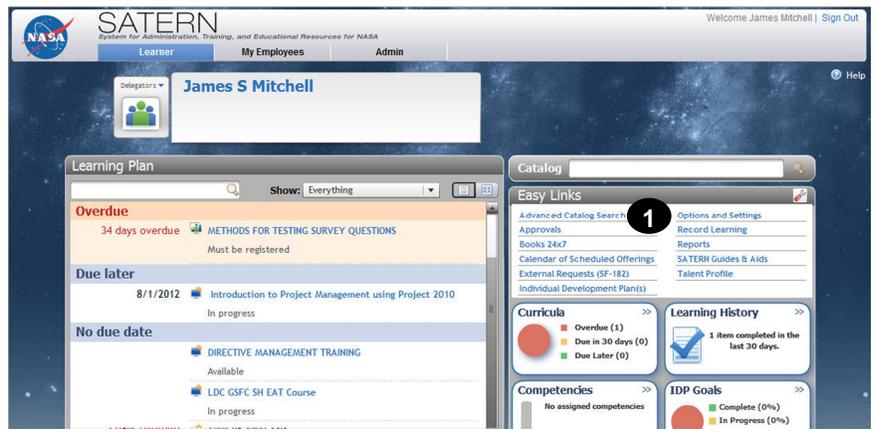


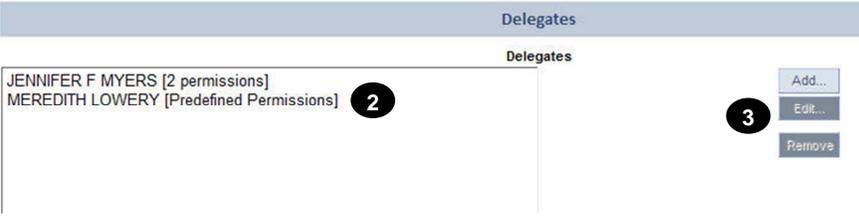
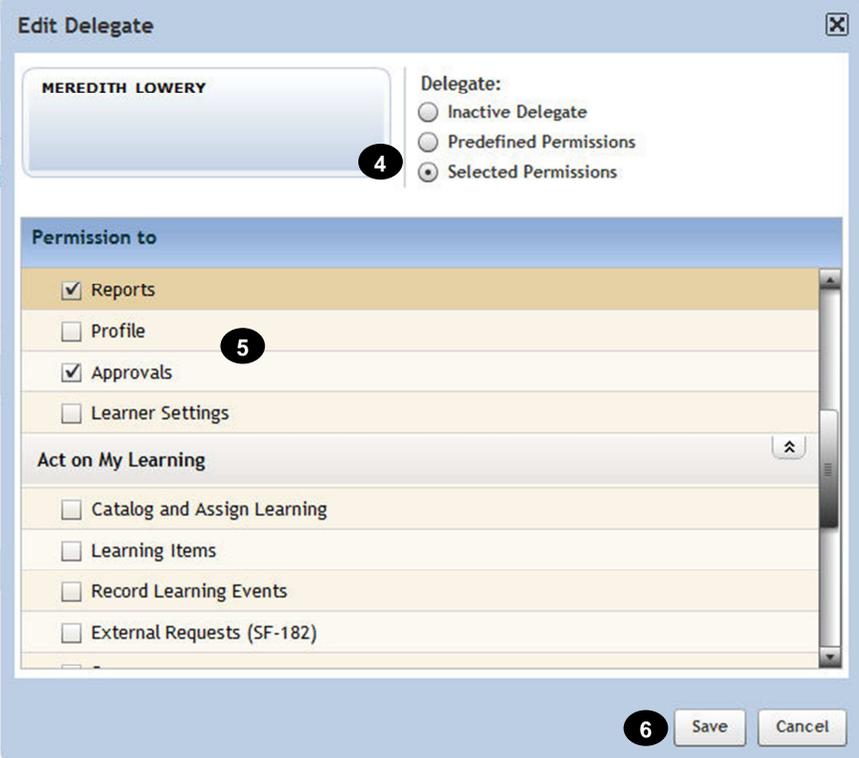
The delegate is now selected and permissions are assigned.



Task B. Edit Delegate Permissions

- 1** From the Learner Tab Home page, click the **Options and Settings** easy link.



<p>2 Select the delegate.</p> <p>3 Click Edit.</p>	
<p>4 Select appropriate permissions. In this example, we changed the delegate's permissions from predefined to selected permissions.</p> <p>5 Select specific permissions to assign the delegate.</p> <p><i>Note: Use the scroll bar to view all permissions available. Also, use the expand and collapse buttons () to control the list view.</i></p> <p>6 Click Save.</p>	
<p>View saved changes.</p>	