User Profile – Assigning Delegates

The Delegate function in PSEE allows staff to be assigned to work on behalf of another staff member. When Delegates work within the PSEE application, the Journal records the action taken, but lists the Delegate as doing the action on behalf of the Delegator.

Adding a Delegate

1. Select the **User Profile Icon** (a) beside the current user in the top right of the screen.

🔩 Projec	t <mark>Suite</mark> Er	terprise Edition	า	User: BEN MCG	REGOR System Admin
Go To Project	- 6	Dashboard - Project	- Search - Scheduling -	Create Project - Assignments -	Other Tools - Reports - He
Project Info [4187	760-2] (Click to coll	apse)			T 😨 🛱
Item Segment	(Click to collapse)				Ŧ
District:	Version:	PSEE Project Manager:		WP Project Manager:	
District 5	AD	CHANG WANG MARTHA KIRKLAND (Backup)		BSP-URS	

2. From the User Profile page select the **Delegates** header to expand that section.

Signature (Click to expand)	(2) ±
Delegates (Click to collegee)	?
My Delegates are no one at this time (Select a new delegate)	
Privileges and Notifications (Click to expand)	? ±
Notification Subscriptions (Click to expand)	(2) ±
User Settings (Click to expand)	(2) ±
Search Profile Management (Click to expand)	±

3. In the text box, type in the first and/or last name of the person to be added as a Delegate. Select the person from the drop down list.

Delegates (Click	to collapse)		? 7
My Delegates are	no one at this time Schwinn SCHWINN, STEPHANE (SS973SS)	(Select a new delegate)	
I'm the delegate fo			

4. The person selected has been added as a Delegate. Repeat the process to add as many Delegates as needed.

ſ	Delegates (Click	to collapse)		
	My Delegates are I'm the delegate fo	MARTHA KIRKLAND <u>Remove</u> STEPHANIE SCHWINN <u>Remove</u> no one at this time	(Select a new delegate)	

5. The system will generate an email to each delegate.

Removing A Delegate

1. To remove a delegate, select the **Remove** hyperlink beside the delegate's name.

Delegates (Click	s to collapse)	(?) ĩ
My Delegates are	MARTHA KIRKLAND Remove STEPHANIE SCHWINN Remove (Select a new delegate)	
I'm the delegate fo	r no one at this time	

2. The system will generate an email to the removed delegate.

A few reminders about delegates:

- Any time delegates are added or removed an email is sent to the affected staff member.
- Delegates cannot add/remove other delegates for the person they are a Delegate for.
- District and Statewide Administrator levels of access cannot be delegated.
- Work done by a delegate is documented as being done by the delegate, but as "on behalf of" their delegator.

Journal Module	(Click to colla	apse)			🖷 🕐 Ŧ
Journal Entry Type:	All Sys	tem Generated	d 🔘 User Generated		
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