

How a PI or Manager Creates or Change Delegates

1. Log in to OneRF using your **ID** and **Password**.
2. Once you are signed in, type **My Delegations** in the search bar ❶, then press enter. A content box will appear as shown below in **Figure 2**.

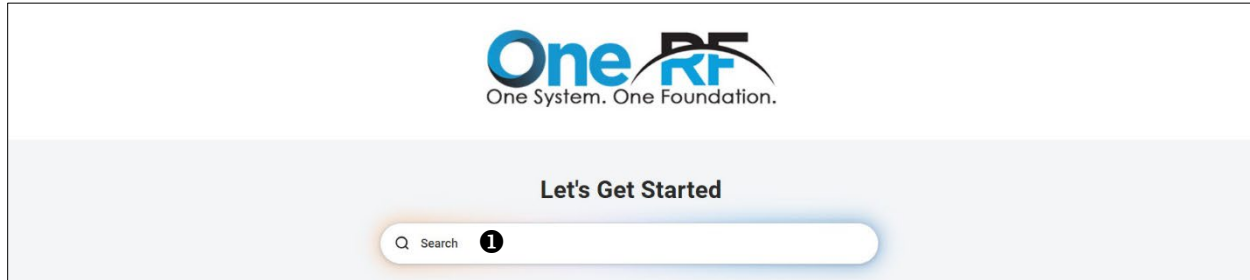


Figure 1

3. Click on **My Delegations** link ❷. A **My Delegations** window will appear as shown in **Figure 3** on **Page 2**.

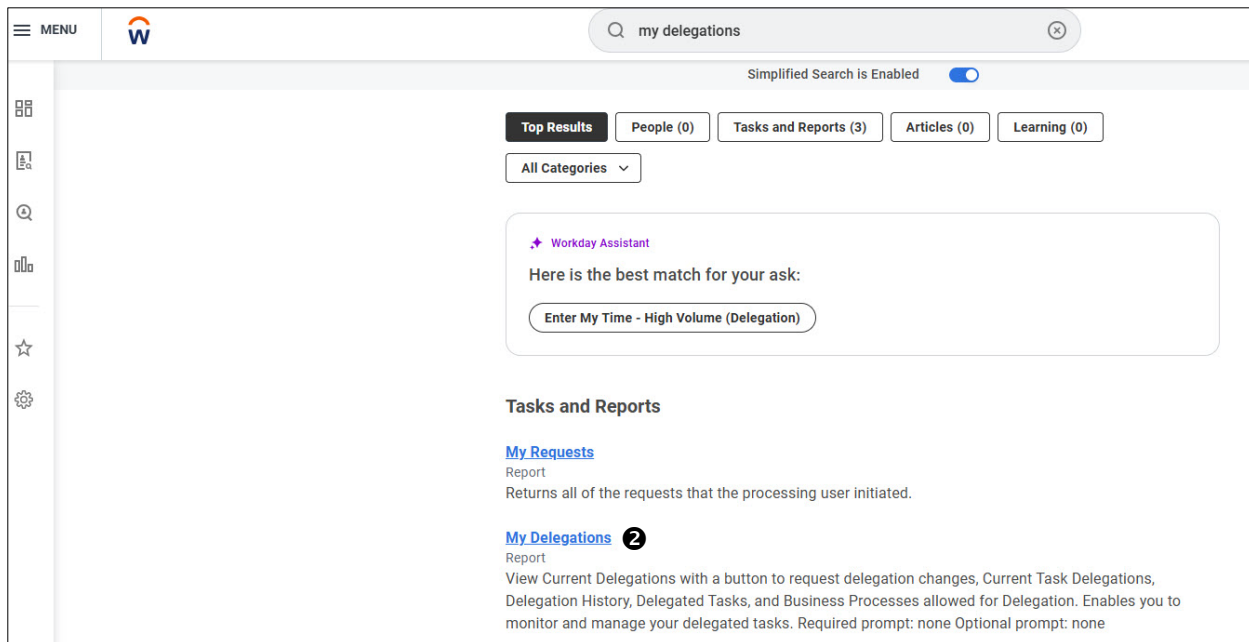


Figure 2

4. Click on **Manage Delegations Button ❶** in **Figure 3** below. A **Manage Delegations** window will appear as seen in **Figure 4**, on **Page 3**.

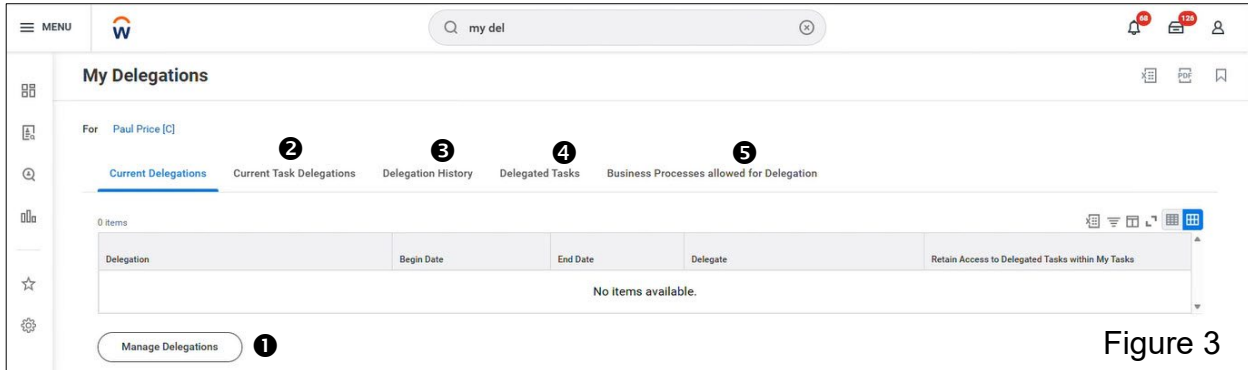


Figure 3

Please Note: This window provides the following:

Current Task Delegations ❷: Displays all active delegations you have assigned to another worker. The purpose is to show which tasks or approvals another person can perform for you at present.

Delegation History ❸: Provides a record of past delegations that have expired or been completed. The purpose is to maintain an audit trail of all previous delegations for compliance and reference.

Delegated Tasks ❹: Lists of all tasks that have been delegated to you by other users. This includes: Name of the person who delegated the task, Type of task or business process, Due date and status.

Business Processes Allowed for Delegation ❺: Displays all business processes in OneRF that your organization allows to be delegated. The purpose is to define which specific actions are eligible for delegation based on organizational policy.

5. After clicking **Manage Delegations** ❶ in Figure 3, on **Page 2**, the **Manage Delegations** screen will appear as shown in **Figure 4** below.
6. Select **Begin and End Date** ❶ for the delegation by clicking on the field and Calendar Icon will populate. In **Figure 5** below, choose a **Delegate** ❷, type in **First & Last** name ❸ of the person you are delegating the tasks to, click on the name and press enter on your keyboard.

In the **Start On My Behalf** ❹ seen in **Figure 6**, type in **Create Expense Report** and **Create Spend Authorization** ❺, then click **Enter** on your keyboard so both tasks are displayed ❻.

In **Do My Tasks On My Behalf** ❼ section in **Figure 7**, select **For Business Purpose** by clicking on the **radial button** ❸. Then type in **Expense Report Event** and **Spend Authorization** and select them ❾. The **Retain Access to Delegated Tasks within my Tasks** box ❿ will auto select. This will allow you to view all the items you are delegating to someone else.

Review the section information in **Figure 8** on **Page 4**. The section will turn blue.

Figure 4

Figure 5

Figure 6

3

Figure 7

Please Note: to assign tasks to multiple individuals, click the plus icon to add additional delegation rows **❶**. To remove a row, click the minus icon located right below the plus sign.

7. A **Comment** **❷** is required explaining the need for the approval delegation as well as why the individual chosen is appropriate.

Please Note: Delegations will need to be approved by the campus Grants Officer.

Upload any documents that are required by clicking **Selected Files** **❸**.

The next step is to click the **Submit Button** **❹**.

An **Alert Banner** will appear as seen in **Figure 9** below.

Figure 8

8. Click on the **banner** **❶**, a message will appear. After reading the **Message**, **X out** to the main screen seen in **Figure 8** above. Then click **Submit** **❸**.

Figure 9

After clicking **Submit**, in a pop-up box will appear saying **You have submitted 1** as shown in **Figure 10** below.

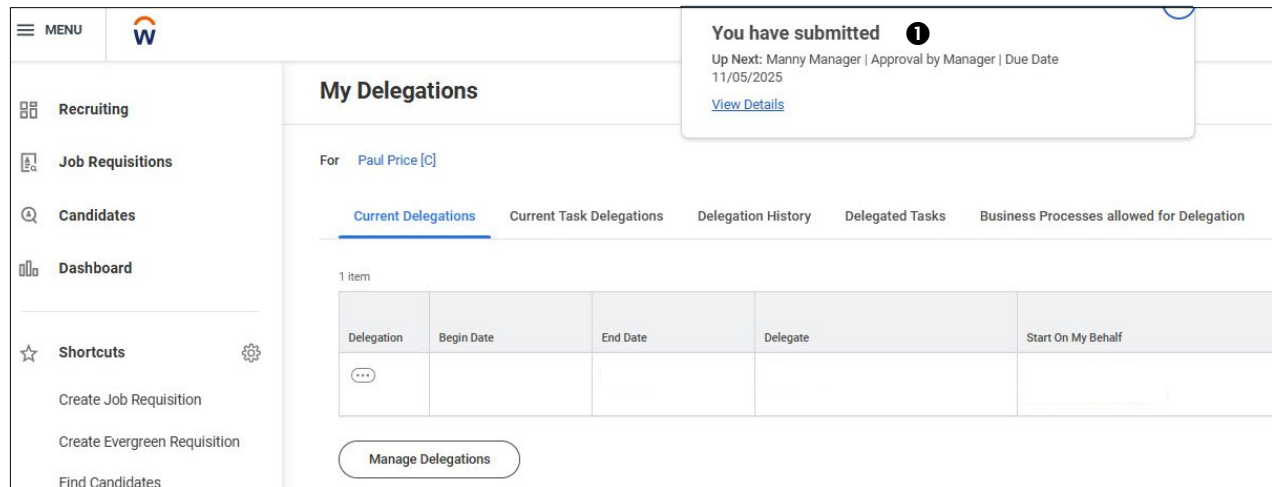


Figure 10

Following the Campus Grant officer **Approval**, OneRF's **Switch Account** functionality allows you to access the system under their profile.

The next section will guide you through how to switch users and carry out delegated activities.

Act as Delegate to Create an Expense Report to Reconcile Transactions for Purchasing Card

1. Log in to OneRF using your **ID** and **Password**.
2. To access the cardholder expenses, click on your profile icon ❶ in the top right corner from the home screen as seen in **Figure 1** below. This will open the profile panel where you choose **Switch Account** ❷.

This will open a list of authorized users on the account to choose from as seen in **Figure 2** below. Switch Account Options, click the name of the person whose delegated task you need to complete. In our example, chose **Paul Price** ❸. A check mark will appear by chosen name.

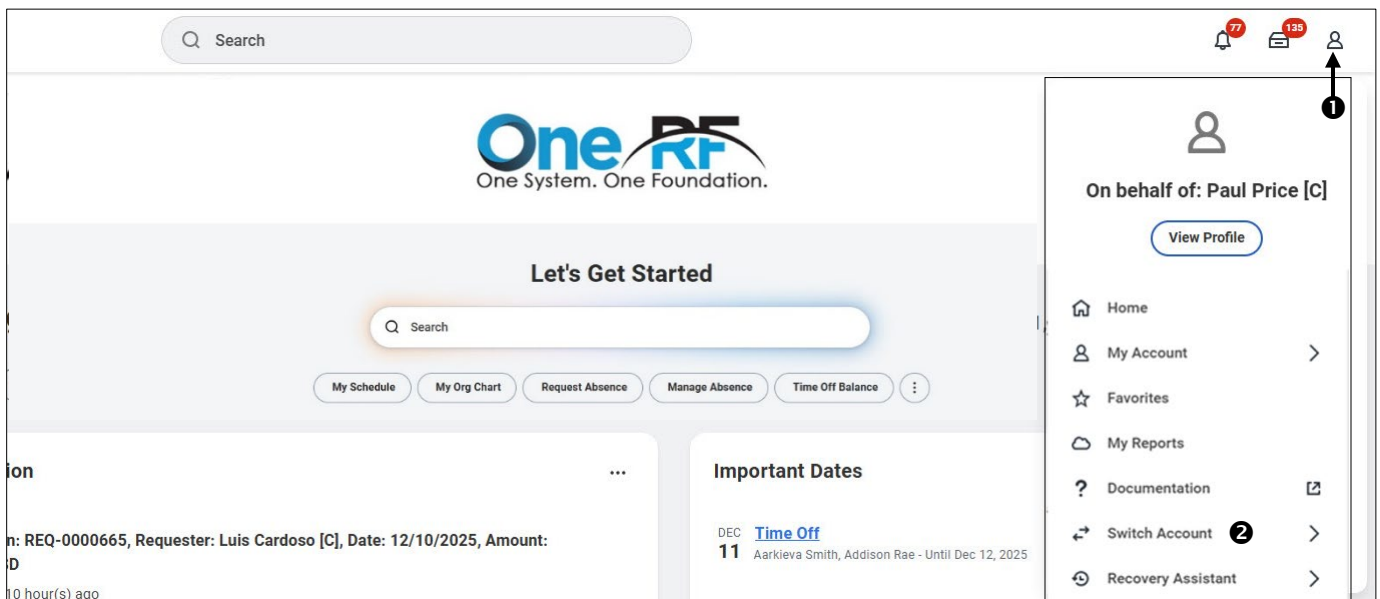


Figure 1

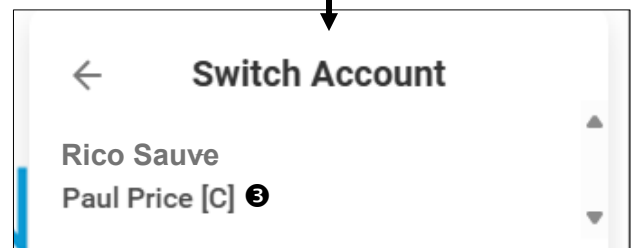


Figure 2

Once you click on the Delegate, the Delegation Dashboard will appear with the Delegate's name (**Paul Price**) ❶ on the upper left side of the screen.

In the **search bar** ❷ type in the **Create Expense Report** or **Create Spend Authorization**. A content box will appear with Create Expense or Spend authorization and select task. Click on **Create Expense Report**.

To complete the task, follow the required Job Aids for:

- How a PI Creates an Expense Report for P-Card Reconciliation
- How a PI Creates an Expense Report for Reimbursement
- How a PI Creates a Spend Authorization (Cash Advance)
- How a PI Creates an Expense Report to Reconcile Spend Authorization (Cash Advance)
- How a PI Itemizes an Expense to Allocate to Multiple Grants

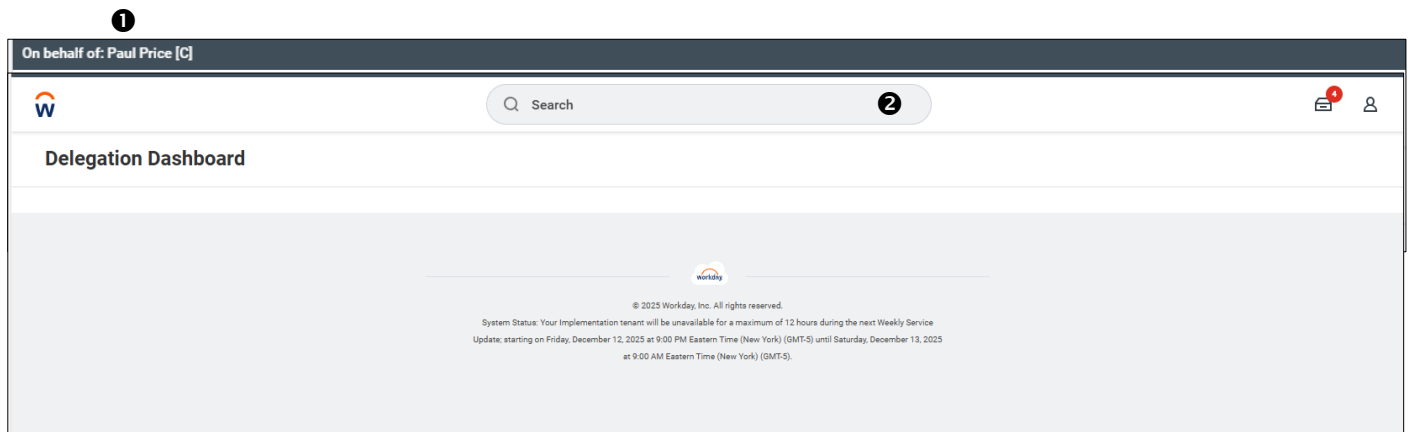


Figure 3

Switching Back

After completing the task, click your profile icon in the upper-right corner ❶. Select **Switch Account** ❷, Choose your **name** ❸ from the list to switch back to your personal account. A check mark will appear by chosen name.

This will bring you back to your account dashboard home screen.

