Delegates

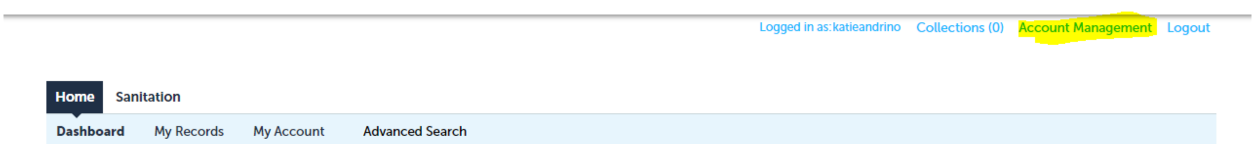
The Delegate feature allows the current user the ability to grant another user view and edit access to the records assigned to the current user. Prior to delegating, it is important for the current user to evaluate, which records, type of permission, and type of access a delegate should have. It is also the responsibility of the current user to periodically review the list of delegates and type of permissions to ensure those access is still needed.

For instance:

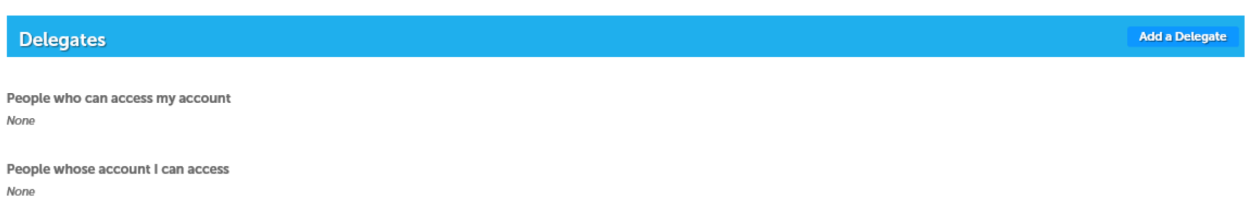
- The current user can decide which AB939 records a Delegate have access to, such as NOT granting Delegate access to the Application and/or Permit Record. Please note that the default is to allow Delegates to view all AB939 records that the current user has access to.
- If the user is away on vacation and has a replacement to complete reports, the user can grant access to the delegated user for that function alone and remove the delegate later.

The delegated user must be an active, registered user. This capability allows the user that delegates access, the ability to control or edit the delegate's access. If a Project Manager wants staff to be able to access all reporting records that they have access to, but not to enter information, the delegate function should be used. The delegate user will still need to login under their own credentials.

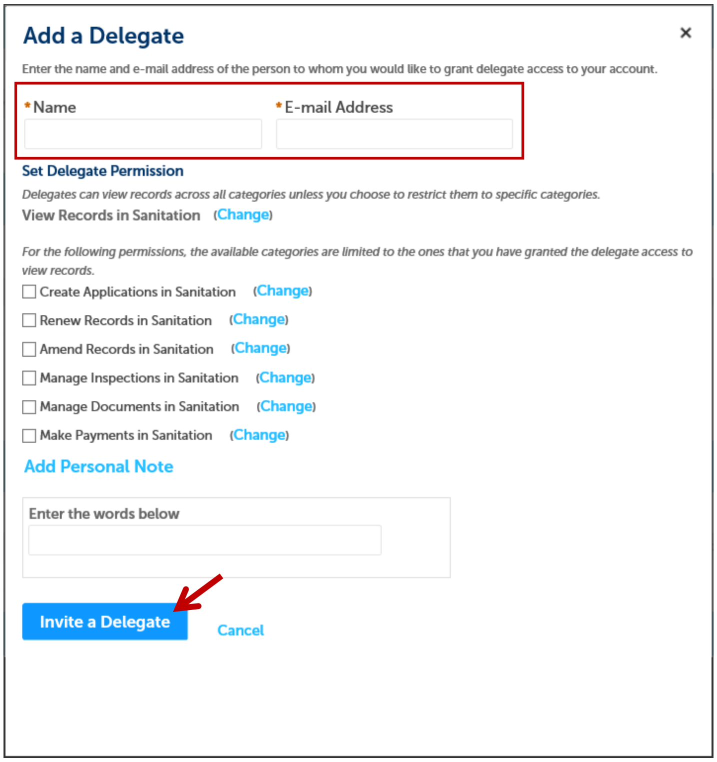
If there are any delegates on the account, they will be listed under the **People who can access my account** or **People whose account I can access**. To add a delegate, go to **Account Management.**

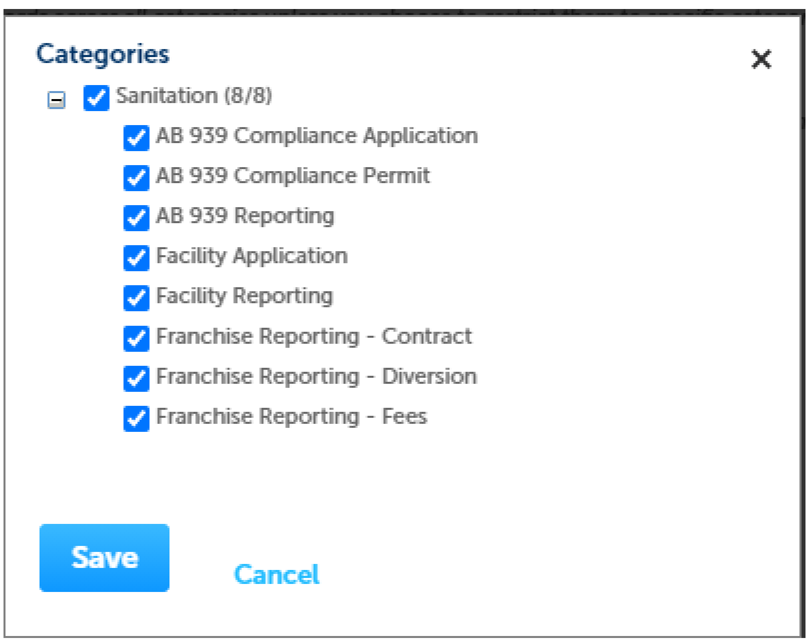


To provide access, select **Add a Delegate**.



A pop-up will appear. Enter the **Name** and **E-mail Address** of the individual to provide access. Edit what the individual should be able to see by selecting **Change**. Select the types of records the delegate should have access to.





Once all the delegation permissions are selected, select **Invite a Delegate**.

The delegate should now appear under **People who can access my account**. The permissions can be altered at any time.


Delegates
Add a Delegate
People who can access my account
User (Email)
Last accessed account on 05/20/2020
Add a Delegate
People whose account I can access
None
Actions
Actions
View Permissions
Edit Permissions
Remove