



Access Delegation Guide

Access delegation allows PMRS users to delegate approval of a process to someone else. Once the request is made, an email notification is sent to the delegated person who has the option to accept or decline this request.

An expiration date can be applied to the delegated period.

What to Consider



It is important to note that actions completed by the delegated user will show in the audit trail as the original user's actions and not the delegate's.



Out of the Office Assistance:
While out of the office, PMRS users can grant colleagues access to their profiles so processes are not delayed while they are away.

Need Help?



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www.njdotlocalaidrc.com

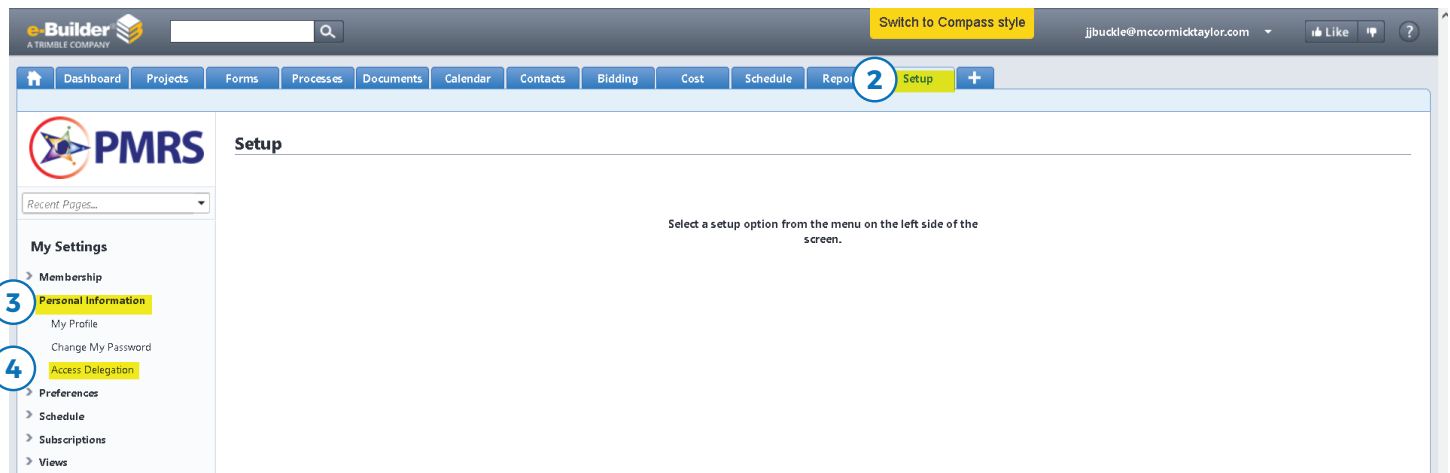
609.649.9395

DOT-LocalAID.ResourceCenter@dot.nj.gov

To Delegate Access to Another User:



1. Log in to e-Builder (PMRS).
2. Select "Setup" tab from top global menu.
3. Select "Personal Information" from left side menu.
4. Then select "Access Delegation."



5. First time users of the Access Delegation tool will have no name listed in the chart.

Access Delegation Management | Access Delegation History

Access Delegation

☐ Filter Delegations

User:	<input type="text"/>	Status:	<input type="text" value="All"/>
Start Date:	From: <input type="text"/> To: <input type="text"/>	End Date:	From: <input type="text"/> To: <input type="text"/>

Action	Current Status	Access Type	User	Start Date	End Date	Notes
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☒ Grant Access ☐ Request Access

* Select User:

Filter Users by Role: Enter username:

Users:

* Access Duration:

Start Date & Time:

End Date & Time:

Notes:

6. Since you are the one who wants to give access to another PMRS member, please select "Grant Access."
7. You are required to select your Delegate using one of three filters:
 - "Filter Users by Role" (This will provide you the list of all PMRS users in that specific role. When you select the role, it will take couple of seconds for the users' names to appear in "Users" list.)
 - "Username" (If you know Delegate's PMRS username, you can use this option.)
 - "Users" (You can select your Delegate's first and last name here. This list is sorted alphabetically by first name.)



8. Select “Access Duration” (Please make sure to select start date, start time, end date, and end time.)
9. You can provide guidance or explain the Delegate’s responsibility (i.e., name specific project) in the “Notes” section.
10. When all required fields are populated, please click “Grant.”

☒ Grant Access ☐ Request Access

Check Spelling Grant Clear

* Select User:

Filter Users by Role
All Roles

Enter username

Users

Please select...

* Access Duration:

Start Date & Time
09.01.2021 1:30pm

End Date & Time

Notes:

Please see filled out sample:

☒ Grant Access ☐ Request Access

Check Spelling Grant Clear

* Select User:

Filter Users by Role
02LA-LPA Clerk

Enter username

Users

R2D2 D1 LPA Clerk

* Access Duration:

Start Date & Time
09.01.2021 1:30pm

End Date & Time
09.02.2021 9:00am

Notes:

Please make sure all projects that need my attention are moving forward in a timely manner during the time I am out of office.

11. If everything was selected correctly, you will receive this message at the top of the page after you clicked “Grant:”

Access Delegation

✓ Saved

Request has been successfully submitted.

×

12. When the Delegate logs in to PMRS, they can see the Delegator username in the dropdown.

e-Builder
A TRIMBLE COMPANY

Switch to Compass style

Wanda Jones

Dashboard Projects Forms Processes Documents Calendar Contacts Bidding Cost Schedule Reports

Setup
eB Community
Product Ideas
Help
John Oscovitch
Logout

Wanda Jones
All Projects

Workflow in your court

Show First

Project	Name	Subject	Step	Date Due
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13. At this point, if the Delegate clicks on the Delegator's username, they will be able to access the Delegator's page and be able to act on behalf of this person.

Example:

The Presiding Officer John Oscovitch delegates access to his Clerk Wanda Jones.

When the Clerk logs in to PMRS, she will see the Presiding Officer's username under the user account dropdown list:

Please keep in mind that any action that a Delegate takes on behalf of the Delegator will show under the Delegator's name and title.

The screenshot shows the PMRS dashboard for Wanda Jones. The user account dropdown menu is open, showing the following options: Setup, eB Community, Product Ideas, Help, John Oscovitch (highlighted), and Logout. The dashboard includes a navigation bar with tabs for Dashboard, Projects, Forms, Processes, Documents, Calendar, Contacts, Bidding, Cost, Schedule, and Reports. The main content area displays 'Wanda Jones' and 'Workflow in your court' with a table of projects.

When the Clerk clicks on the Presiding Officer's username, she will be brought to the Presiding Officer's PMRS homepage:

The screenshot shows the PMRS dashboard for John Oscovitch. The user account dropdown menu is open, showing the following options: Like, Dislike, and John Oscovitch (highlighted). The dashboard includes a navigation bar with tabs for Dashboard, Projects, Forms, Processes, Documents, Calendar, Contacts, Bidding, Cost, Schedule, Reports, and Setup. The main content area displays 'John Oscovitch' and 'Workflow in your court' with a table of projects.

When the Clerk accesses the specific project and/or specific process that the Presiding Officer requested him/her to act on, the Clerk can look for the process/project in the Presiding Officer's court:

The screenshot shows the PMRS dashboard for John Oscovitch. The 'Workflow in your court' table displays the following project:

Project	Name	Subject	Step	Date Due	Requested Comment
LA-2018 MA Byram Twp TRAINING BAKUP-Roseville Road Improvements 19	LAAE - 1	Resolution - LA-2018 MA Byram Twp TRAINING BAKUP-Roseville Road Improvements 19	Presiding Officer Signs		

Click on the process abbreviation under the "Name" column to enter to that specific process for that specific project.



Next the Clerk follows the process steps and fills in all the fields that the Presiding Officer has to fill. Then the Clerk selects “Signed” in the “Take Action” dropdown menu and clicks “Take Action.”

Even though the Clerk acted on this step, the Presiding Officer's name will appear in the next step as the person who signed the Resolution in the Presiding Officer step:

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