



Microsoft Dynamics AX Tip Sheet: Approval Delegation While on Vacation

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ABOUT AXUG:

The Dynamics AX User Group is an independent community focused on end-user education, training and networking. AXUG is recognized by Microsoft as the official user group for Dynamics AX.

Overview

This tip sheet was written by an AXUG user member and covers the process for creating delegations in the User Options form within Dynamics AX.

VERSION OF DYNAMICS AX

AX 2012 R2

ABOUT THE AUTHOR

Michele Foster is an IT System Administrator for Depomed, Inc. Foster has been working with Dynamics AX products since 2008, and has been part of the AXUG community since 2009. Foster became an AXUG Advisory Board member in 2014 and has been on the Summit Planning and Programming committees for the last year. Being part of this community and helping others to understand the world of ERP has been her focus and passion since her initiation to Axapta 4.0. Foster's primary areas of expertise are within Security and Workflow realms, but also strives to learn more about the AX universe every day.



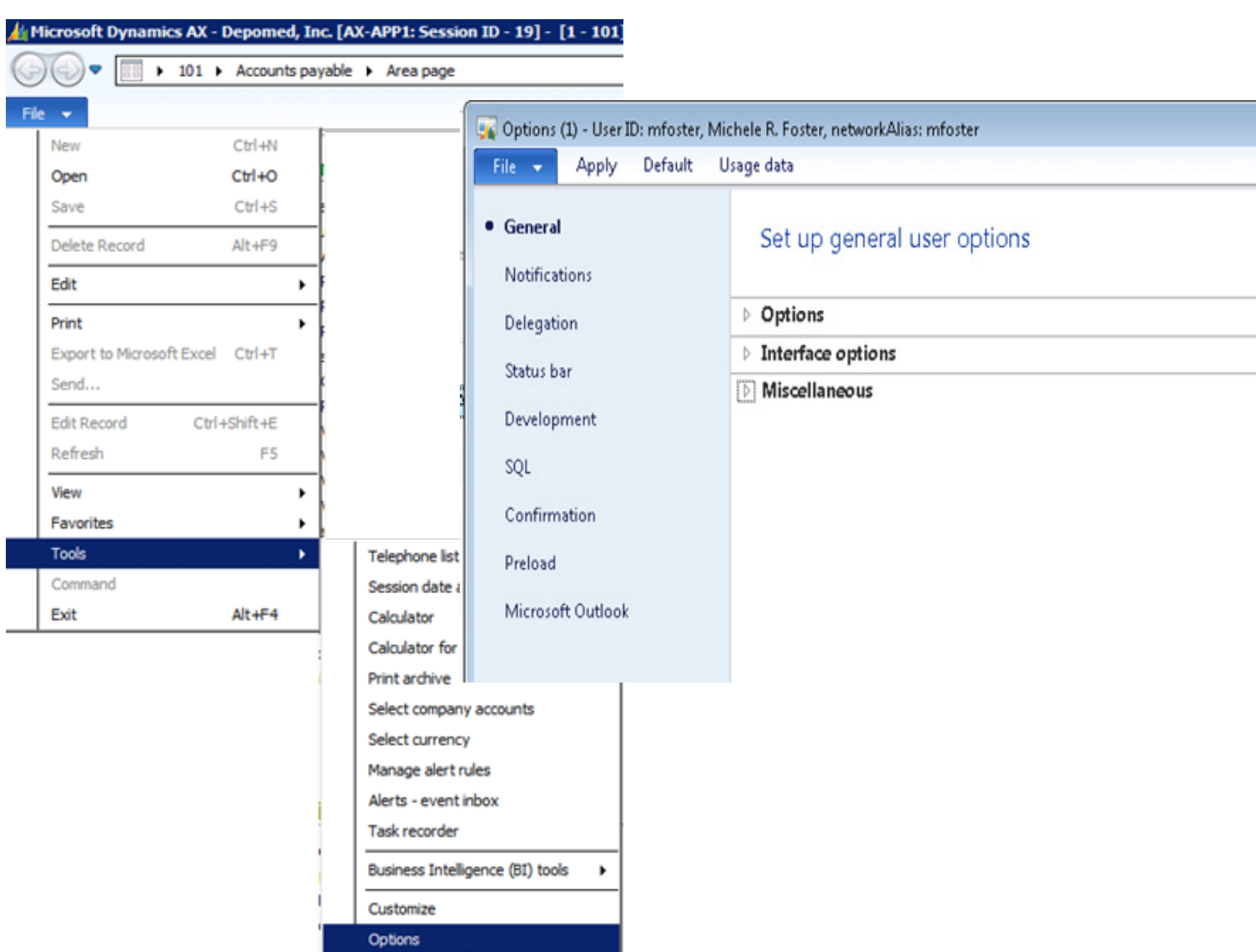
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Approval Delegation While on Vacation

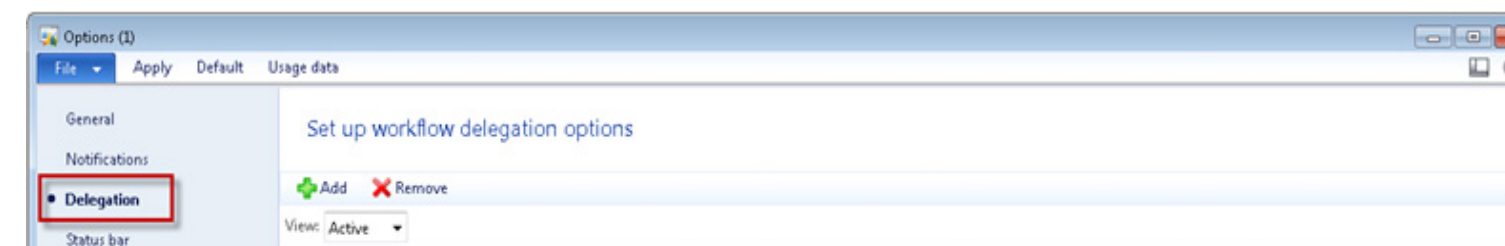
Prior to going on vacation or other type of absence, a quick setup to delegate approval items is recommended to ensure that workflow or other approval processes are not disrupted. This easy setup takes place in the User Options form. The ONLY, but most important requirement is that the person you choose must have the same or higher approval access in the system.

To set your delegations, follow the steps below:

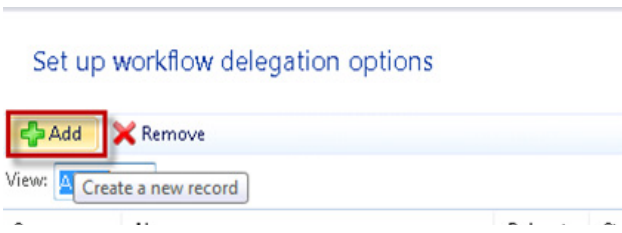
1. In the upper left corner of your AX window, Navigate to: **File -> Tools -> Options** menu item.



2. In the User Options Form, switch to the **Delegation** tab.



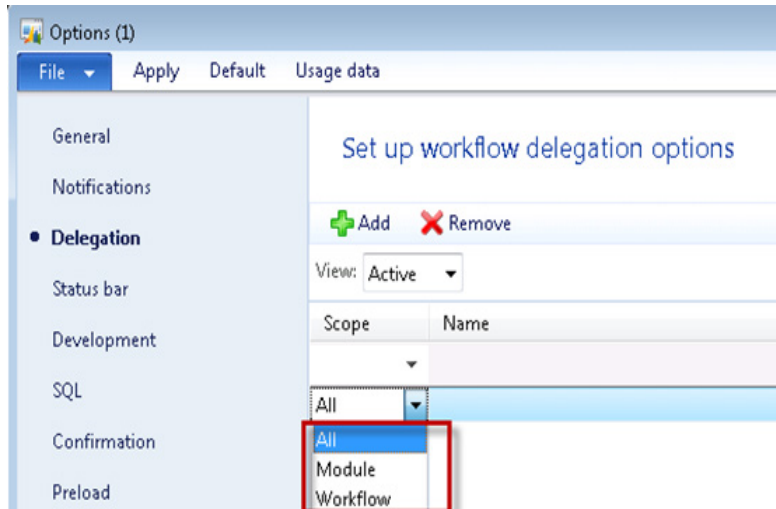
1. Click the **Add** button.



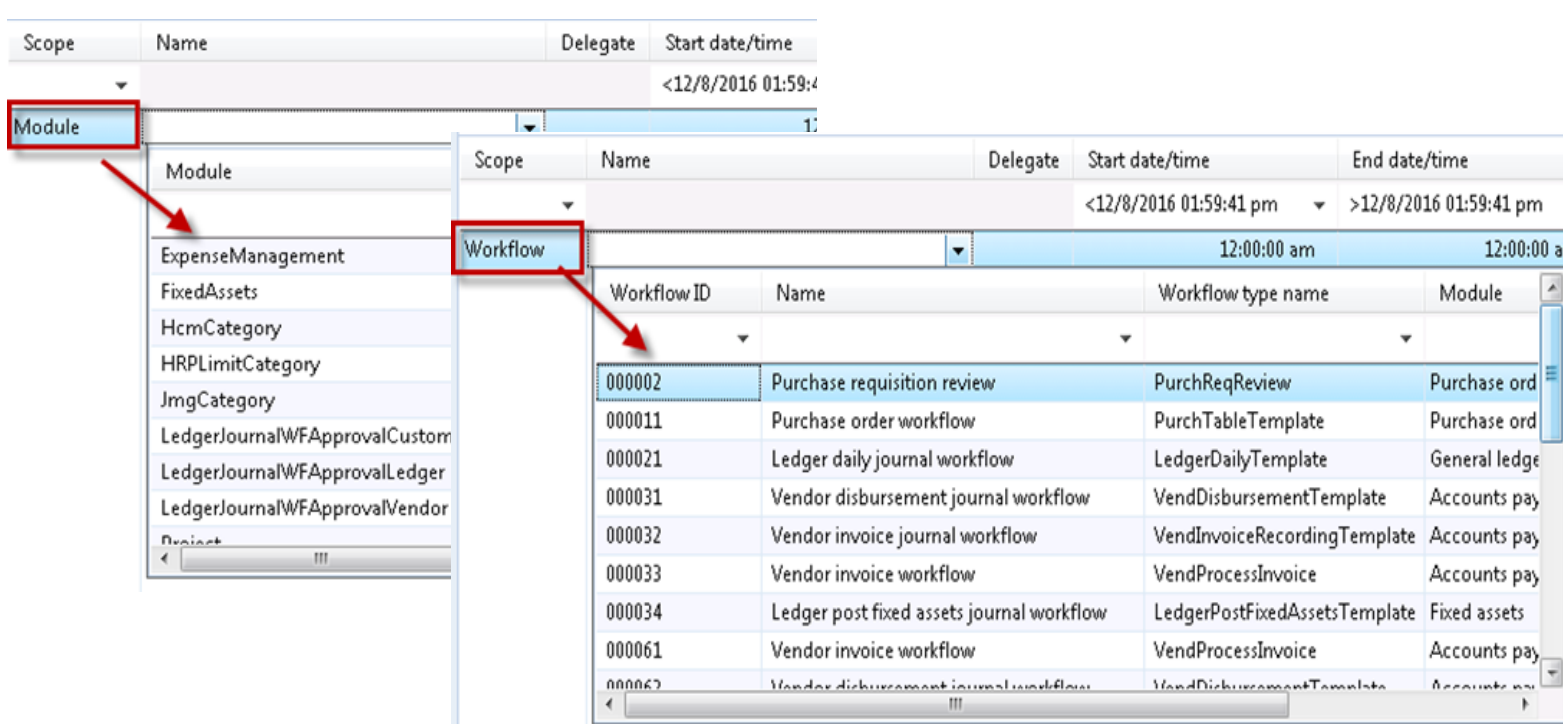
2. In the **Scope** field, select one of three options:

- a. All – Routes all workflow approvals to a delegate (all workflows regardless of area)
- b. Module – Routes all approvals within a specific module to a delegate (e.g. Accounts Payable approvals)
- c. Workflow – Routes all approvals by workflow name to a delegate

Note: You must know the workflow name prior to using this option



3. When selecting either the Module or Workflow option, select the name of the module or workflow from the drop-down list.
4. In the **Delegate** field, select a delegate from the drop-down menu (all active users in AX are displayed).
5. Select a **Start date/time**.
6. Select an **End date/time**.
7. Check the **Enabled** box.
8. To create additional delegates for different modules or periods of time, click the down arrow on your keyboard or click the **Add** button again to create a new delegate.



9. Close the **Options** form.

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