

Managing Delegation

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Managing Delegation

HR Direct Manager's Self Service provides a process to reassign your system responsibilities for approving and monitoring requests for employees. Whether you are on vacation or need to delegate some of your duties, you are able to designate some or all of that responsibilities to another system user.

When you delegate to a proxy, an e-mail is sent to that user. They will go into Employee Self Service and accept or reject the requested responsibilities. An e-mail is then generated to the delegation administrator and to the originator of the request. If accepted a process that is monitored by the delegation administrator ensures that the proxy has permission to the pages and employees required to complete the accepted responsibility. If an end date is provided, the process will revoke the privileges based on the submitted end date.

Upon completion of this section you will be able to:

- Delegate another employee proxy responsibility for some or all of your transactions
- Review the status of your delegation request

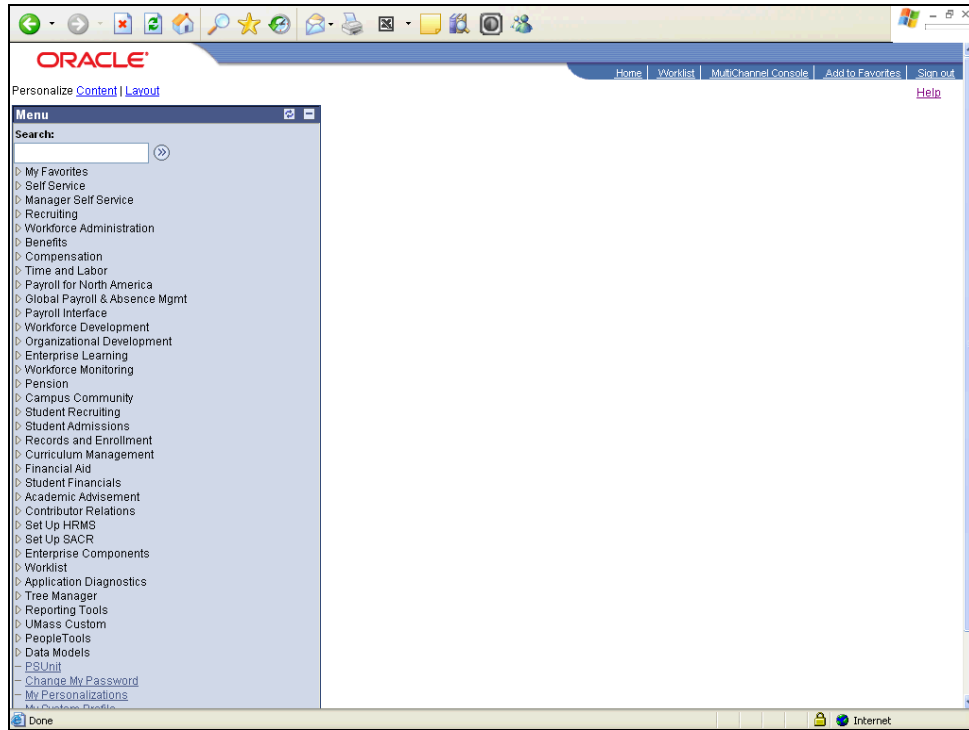
Delegating a Proxy

HR Direct's Manager Self Service provides a means for a Manager to delegate their access and transaction processing authority to a proxy. To Delegate someone as a proxy means to grant them authority to act on your behalf. When a proxy has delegated authority, the Delegation framework temporarily assigns the proxy a unique role that is specific to the delegated transaction. The role enables the proxy to access the components and pages associated with the delegated transaction. When the proxy no longer has delegated authority, the Delegation framework removes that role and thus prevents the proxy from performing the transaction.

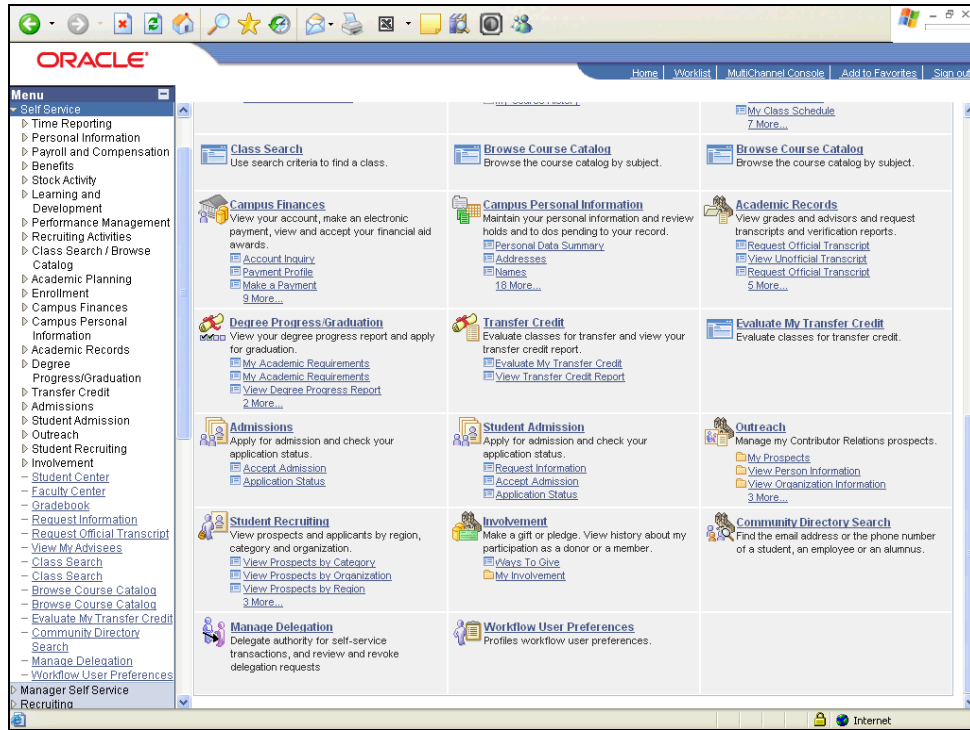
Procedure

Consider this scenario:

You are planning to be gone for a short period of time and need another manager to monitor your approvals and other required activity while you are away.



Step	Action
1.	<p>Manage Delegations is in Employee Self Service since not all persons who need to assign proxies are managers.</p> <p>Click the Self Service link.</p> <p>▶ Self Service</p>



Step	Action
2.	Click the Manage Delegation link.

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Manage Delegation

Emma Maley

Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.

[Learn More about Delegation](#)

Select *Create Delegation Request* to choose transactions to delegate and proxies to act on your behalf.

[Create Delegation Request](#)

Step	Action
3.	<p>Additional information about managing delegation is available.</p> <p>Click the Learn More about Delegation link.</p> <p>Learn More about Delegation</p>

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Manage Delegation

Return

Emma Maley

What is Delegation?

Depending upon how your System Administrator has setup your system, you may be able to delegate some or all of your Employee and/or Manager Self Service transactions to one or more people. When delegating transactions, you can specify whether you're delegating the authority to initiate a transaction, or approve a transaction.

For example, you may choose to delegate some or all of your transactions for the following reasons:

- You know that you'll be away from the office for an extended period of time, and thus won't be able to manage transactions for you or your employees. You can delegate your transactions to someone else for a specific period of time.
- You prefer to have an assistant process all of your transactions. You can delegate all of your transactions to someone else for an indefinite period of time.

There are three links on Delegation Home Page - one for each way of managing delegation:

- Create Delegation Request** - To create a delegation request so that your transaction(s) can be taken care of by a proxy.
- Review My Proxies** - To view a list of transactions that you have delegated to proxies and to revoke the delegated authority of proxies.
- Review My Delegated Authorities** - To view a list of transactions that have been delegated to you. You can either accept the request or reject the request.

FAQ

Who can I delegate transactions to?

Just about anyone. The other person does not have to be a manager, and they don't have to report to you.

What happens when I delegate Approval authority to someone?

When you delegate Approval authority to a proxy, this person can act on your behalf to approve pending transactions. The proxy will be notified of pending transactions (just as you are), and can execute the approval. In the event that the transaction must go up another level in the organization hierarchy, the next level approver(s) will be determined based upon your position in the hierarchy - not the proxy's.

Can I delegate a single transaction to more than one person?

No, you can not delegate the same transaction to more than one proxy for the same delegation period.

Step	Action
4.	<p>The top half of the page explains how delegation works in the system.</p> <p>Click the scrollbar.</p>
5.	<p>The bottom part of the page displays a FAQ for delegation.</p> <p>Click the Return button.</p> <div>Return</div>

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Manage Delegation

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Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.

[Learn More about Delegation](#)

Select *Create Delegation Request* to choose transactions to delegate and proxies to act on your behalf.

[Create Delegation Request](#)

Step	Action
6.	Click the Create Delegation Request link. Create Delegation Request

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Create Delegation Request

Enter Dates

Emma Maley

Executive Vice Chancellor

Enter the dates for your delegation request. Enter a *From Date* that is today or later. Enter a *To Date* that is the same as or later than your *From Date*. For open-ended delegation requests, leave the *To Date* blank.

Delegation Dates

From Date:

To Date:

Step	Action
7.	<p>Enter the first date you need someone to monitor your approvals.</p> <p>Enter the desired information into the From Date: field.</p> <p>Enter "02012009".</p>
8.	<p>Enter the last date the proxy will perform these activities.</p> <p>Note: This can be open-ended. No <i>To Date</i> is required.</p> <p>Enter the desired information into the To Date field.</p> <p>Enter "02152009".</p>
9.	<p>Click the Next button.</p> <p><input type="button" value="Next"/></p>

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Create Delegation Request

Select Transactions

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Executive Vice Chancellor

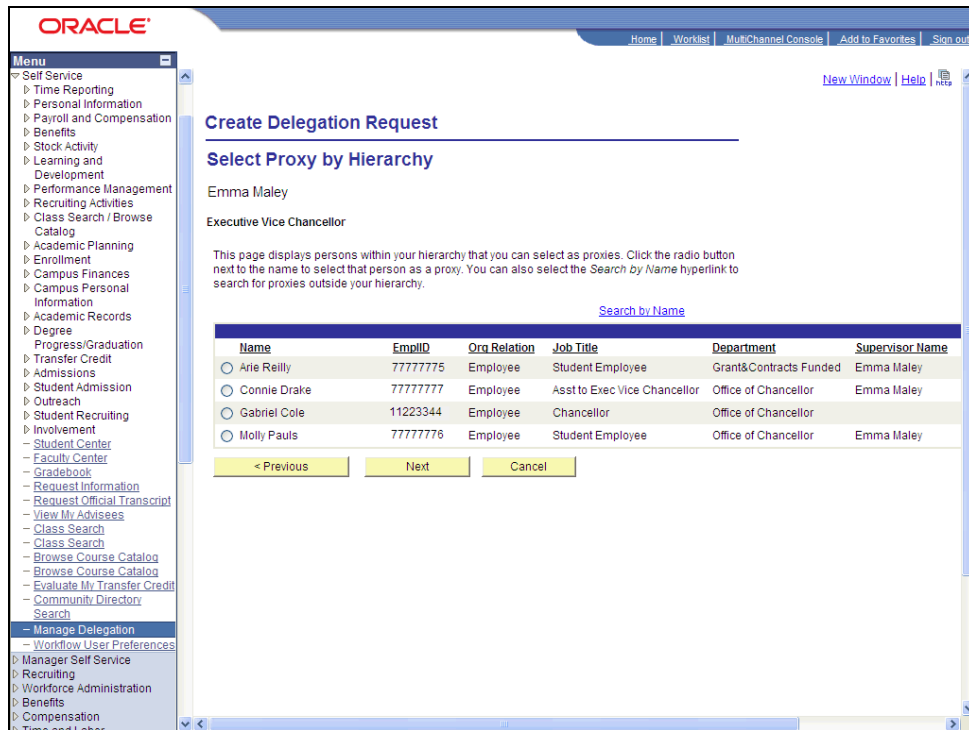
Select the transactions that you want to delegate to a proxy. You can select one or many transactions.

Transactions
<input type="checkbox"/> Ad Hoc Salary Change
<input type="checkbox"/> Approve Payable Time
<input type="checkbox"/> Approve Reporting Change
<input type="checkbox"/> Initiate Change Full/Pt Status
<input type="checkbox"/> Initiate Employee Information
<input type="checkbox"/> Initiate Reporting Change
<input type="checkbox"/> Initiate Retire Employee
<input type="checkbox"/> Initiate Terminate Employee

Select All Clear All

< Previous Next Cancel

Step	Action
10.	<p>Select the transactions that the proxy will cover.</p> <p>You can turn on individual check boxes for some transactions or use the Select All button.</p> <p>Click the Select All button.</p> <p>Select All</p>
11.	<p>Click the Next button.</p> <p>Next</p>
12.	<p>The Select Proxy by Hierarchy page is used to select the person to whom you want to assign your proxy.</p> <p>The list that appears are all persons in your reporting chain (upward or downward).</p> <p>You can use the Search by Name hyperlink to find a proxy outside of your reporting chain.</p>
13.	<p>Decision: Please make a selection from the options listed below.</p> <ul style="list-style-type: none"> Select a proxy from my reporting chain Go to step 14 on page 10 Select a proxy from outside my reporting chain Go to step 24 on page 15



Step	Action
14.	<p>Select the person who will perform these transactions.</p> <p>Click the Gabriel Cole option.</p> <p><input type="radio"/></p>
15.	<p>Click the Next button.</p> <p><input type="button" value="Next"/></p>

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Create Delegation Request

Delegation Detail

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Select the *Notify Delegator* checkbox to receive all the notifications that your proxy receives when acting on your behalf.

Proxy:

Gabriel Cole

From Date:

02/01/2009

To Date:

02/15/2009

Transactions


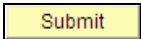
- Ad Hoc Salary Change
- Approve Payable Time
- Approve Reporting Change
- Initiate Change Full/PT Status
- Initiate Employee Information
- Initiate Reporting Change
- Initiate Retire Employee
- Initiate Terminate Employee

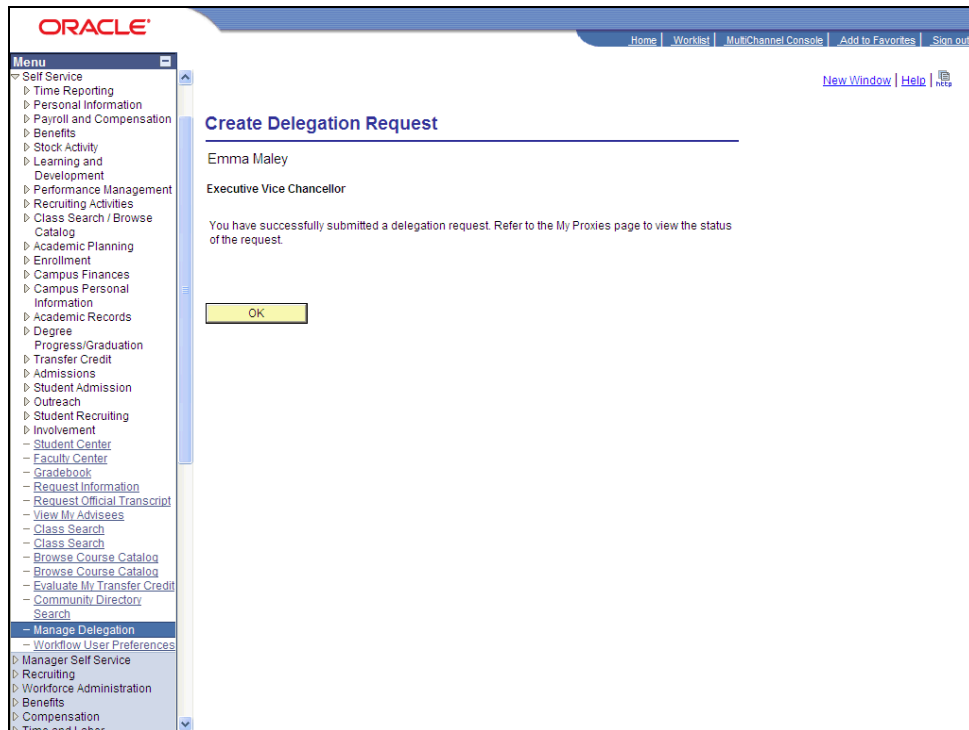
☐ Notify Delegator

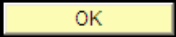
< Previous

Submit

Cancel

Step	Action
16.	<p>You can review your selections and turn on the Notify Delegator check box if you want to receive the same notifications that your proxy gets in your absence.</p> <p>Click the Notify Delegator option.</p> 
17.	<p>Click the Submit button.</p> 



Step	Action
18.	<p>A message appears to verify the submission of the delegation request.</p> <p>Click the OK button.</p> 
19.	<p>The My Proxies page appears for you to review the transactions.</p> <p>You can turn on a checkbox and press Revoke for any transactions you do not want this proxy to perform.</p>

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My Proxies

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Executive Vice Chancellor

This page allows you to view your proxies and the request status for each delegation request. Select a particular status and click *Refresh* to show the matching requests. Click the information icon to view request details. To revoke requests, select the request, then click *Revoke*.

Show Requests by Status:

Refresh

Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status
<input type="checkbox"/> Initiate Change Full/PT Status	Gabriel Cole		04/01/2009	04/15/2009	Submitted	Inactive
<input type="checkbox"/> Initiate Terminate Employee	Gabriel Cole		04/01/2009	04/15/2009	Submitted	Inactive
<input type="checkbox"/> Initiate Retire Employee	Gabriel Cole		04/01/2009	04/15/2009	Submitted	Inactive
<input type="checkbox"/> Initiate Employee Information	Gabriel Cole		04/01/2009	04/15/2009	Submitted	Inactive
<input type="checkbox"/> Approve Reporting Change	Gabriel Cole		04/01/2009	04/15/2009	Submitted	Inactive
<input type="checkbox"/> Ad Hoc Salary Change	Gabriel Cole		04/01/2009	04/15/2009	Submitted	Inactive
<input type="checkbox"/> Initiate Reporting Change	Gabriel Cole		04/01/2009	04/15/2009	Submitted	Inactive
<input type="checkbox"/> Approve Payable Time	Gabriel Cole		04/01/2009	04/15/2009	Submitted	Inactive

Select All

Clear All

Revoke

Return to Manage Delegation

Step	Action
20.	Click the Return to Manage Delegation link. Return to Manage Delegation

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Manage Delegation

Emma Maley

Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.

[Learn More about Delegation](#)

Select [Create Delegation Request](#) to choose transactions to delegate and proxies to act on your behalf.

[Create Delegation Request](#)

Select [Review My Proxies](#) to review the list of transactions that you have delegated and the proxy for each transaction.

[Review My Proxies](#)

Step	Action
21.	<p>A new link appears that allows you to return to the My Proxies page to review and/or change the proxies you have created.</p> <p>Click the Review My Proxies link.</p> <p>Review My Proxies</p>
22.	<p>You see the My Proxies page. You can click the information icon at the end of the row to see additional details about the proxy request.</p>
23.	<p>Congratulations! You have successfully delegated a proxy.</p> <p>End of Procedure. Remaining steps apply to other paths.</p>

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Create Delegation Request

Select Proxy by Hierarchy

Emma Maley

Executive Vice Chancellor

This page displays persons within your hierarchy that you can select as proxies. Click the radio button next to the name to select that person as a proxy. You can also select the [Search by Name](#) hyperlink to search for proxies outside your hierarchy.

[Search by Name](#)

Name	EmpID	Org Relation	Job Title	Department	Supervisor Name
<input type="radio"/> Arie Reilly	77777775	Employee	Student Employee	Grant&Contracts Funded	Emma Maley
<input type="radio"/> Connie Drake	77777777	Employee	Asst to Exec Vice Chancellor	Office of Chancellor	Emma Maley
<input type="radio"/> Gabriel Cole	11223344	Employee	Chancellor	Office of Chancellor	Emma Maley
<input type="radio"/> Molly Pauls	77777776	Employee	Student Employee	Office of Chancellor	Emma Maley

< Previous Next Cancel

Step	Action
24.	<p>Search for the name of the person to serve as a proxy.</p> <p>Click the Search by Name link.</p> <p>Search by Name</p>
25.	<p>Enter the desired information into the Last Name field.</p> <p>Enter "michaels".</p>
26.	<p>Enter the desired information into the First Name field.</p> <p>Enter "john".</p>
27.	<p>Click the Search button.</p> <p><input type="button" value="Search"/></p>
28.	<p>Select the person who will perform these transactions.</p> <p>Click the Gabriel Cole option.</p> <p><input type="radio"/></p> <p>Go to step 15 on page 10</p>

Receiving and Processing a Delegation Invitation

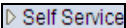
When you have been designated as a proxy, you may review the transactions assigned to you and choose to accept or reject the invitation to be a proxy.

Procedure

Consider this scenario:

You have been notified that you are to be a proxy for delegated tasks while Emma Maley is away. Access the Manage Delegations page to accept the responsibilities.



Step	Action
1.	Click the Self Service link. 



Step	Action
2.	<p>Click the Manage Delegation link.</p> 

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Manage Delegation

Gabriel Cole

Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.

[Learn More about Delegation](#)

Select [Create Delegation Request](#) to choose transactions to delegate and proxies to act on your behalf.

[Create Delegation Request](#)

Select [Review My Delegated Authorities](#) to see the list of transactions that have been delegated to you by others, and to accept or reject pending delegation requests.

[Review My Delegated Authorities](#)

[Main Content](#)

Step	Action
3.	<p>When you have been assigned as a proxy, you will see the <i>Review My Delegated Authorities</i> link.</p> <p>Click the Review My Delegated Authorities link.</p> <p>Review My Delegated Authorities</p>

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My Delegated Authorities

Gabriel Cole

Chancellor

This page allows you to view your delegated authorities. Select a particular status and click Refresh to show the matching requests. Click the information icon for request details.

Show Requests by Status: Refresh

Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status
<input type="checkbox"/> Multiple Transactions	Emma Maley	Executive Vice Chancellor	02/01/2009	02/15/2009	Accepted	Inactive

Select AllClear All

Return to Manage Delegation

Step	Action
4.	Review the transactions assigned to you. Click the Transaction link. Multiple Transactions

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Multiple Transactions

Transaction	Name	From Date	To Date	Request Status	Delegation Status
Initiate Reporting Change	Emma Maley	02/01/2009	02/15/2009	Submitted	Inactive
Ad Hoc Salary Change	Emma Maley	02/01/2009	02/15/2009	Submitted	Inactive
Approve Reporting Change	Emma Maley	02/01/2009	02/15/2009	Submitted	Inactive
Initiate Employee Informaiton	Emma Maley	02/01/2009	02/15/2009	Submitted	Inactive
Initiate Retire Employee	Emma Maley	02/01/2009	02/15/2009	Submitted	Inactive
Initiate Terminate Employee	Emma Maley	02/01/2009	02/15/2009	Submitted	Inactive
Initiate Change Full/PT Status	Emma Maley	02/01/2009	02/15/2009	Submitted	Inactive

Return

Step	Action
5.	Review the assigned proxy information. Click the Return button. <div>Return</div>

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My Delegated Authorities

Gabriel Cole

Chancellor

This page allows you to view your delegated authorities. Select a particular status and click Refresh to show the matching requests. Click the information icon for request details.

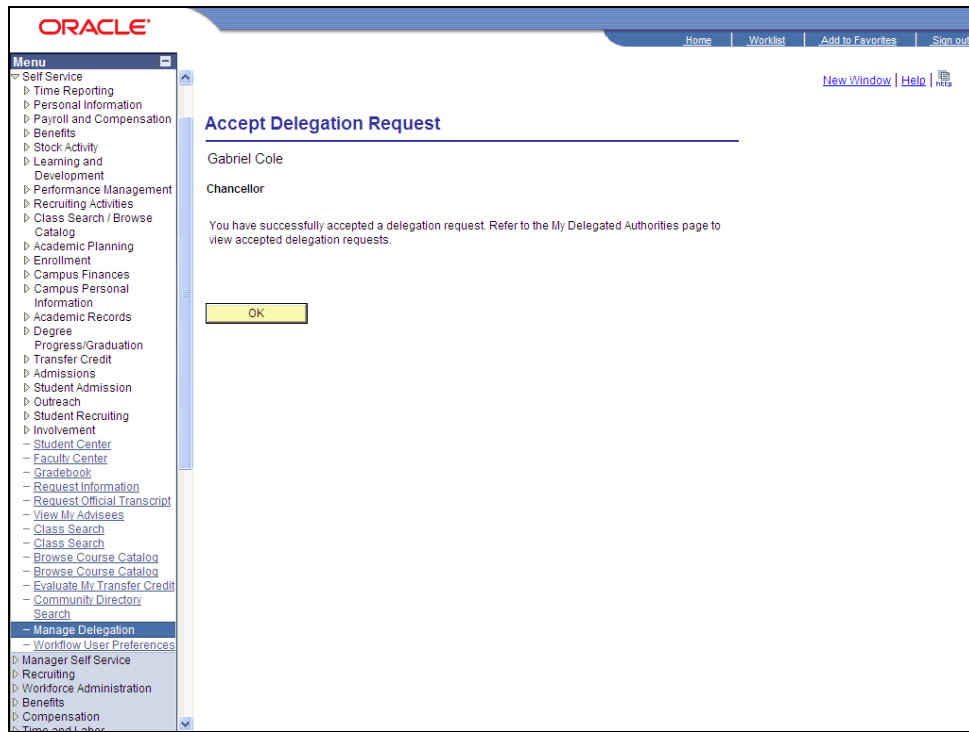
Show Requests by Status: SubmittedRefresh

Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status
<input type="checkbox"/> Multiple Transactions	Emma Maley	Executive Vice Chancellor	02/01/2009	02/15/2009	Submitted	Inactive

Select AllClear AllAcceptReject

[Return to Manage Delegation](#)

Step	Action
6.	<p>You are now ready to accept the responsibility.</p> <p>Click the Multiple Transactions option.</p> <div><input type="checkbox"/></div>
7.	<p>If you choose to decline, you can select the Reject button.</p> <p>In this example, you will accept the responsibility.</p> <p>Click the Accept button.</p> <div>Accept</div>



Step	Action
8.	<p>The Accept Delegation Request page verifies your acceptance.</p> <p>Click the OK button.</p> <div>OK</div>

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My Delegated Authorities

Gabriel Cole

Chancellor

This page allows you to view your delegated authorities. Select a particular status and click **Refresh** to show the matching requests. Click the information icon for request details.

Show Requests by Status:

[Return to Manage Delegation](#)

Step	Action
9.	Click the Return to Manage Delegation link. Return to Manage Delegation

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Manage Delegation

Gabriel Cole

Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.

[Learn More about Delegation](#)

Select *Create Delegation Request* to choose transactions to delegate and proxies to act on your behalf.

[Create Delegation Request](#)

Select *Review My Delegated Authorities* to see the list of transactions that have been delegated to you by others, and to accept or reject pending delegation requests.

[Review My Delegated Authorities](#)

Step	Action
10.	<p>At any time, you may come back to the Manage Delegation page to review your delegated authorities.</p> <p>Click the Review My Delegated Authorities link.</p> <p>Review My Delegated Authorities</p>

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My Delegated Authorities

Gabriel Cole

Chancellor

This page allows you to view your delegated authorities. Select a particular status and click *Refresh* to show the matching requests. Click the information icon for request details.

Show Requests by Status:
Submitted
Refresh

Select All
Clear All

[Return to Manage Delegation](#)

Step	Action
11.	<p>You can select the status that you want to view.</p> <p>Click the Show Requests by Status list.</p> <div>Submitted</div>

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My Delegated Authorities

Gabriel Cole

Chancellor

This page allows you to view your delegated authorities. Select a particular status and click Refresh to show the matching requests. Click the information icon for request details.

Show Requests by Status:

Submitted

Refresh

Select All

Clear All

Accepted

Ended

Rejected

Revoked

Submitted

[Return to Manage Delegation](#)

Step	Action
12.	<p>Click the Accepted list item.</p> <div>Accepted</div>

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My Delegated Authorities

Gabriel Cole


Chancellor

This page allows you to view your delegated authorities. Select a particular status and click Refresh to show the matching requests. Click the information icon for request details.

Show Requests by Status: Accepted Refresh

Select All Clear All

[Return to Manage Delegation](#)

Step	Action
13.	Click the Refresh button. <div>Refresh</div>
14.	The information button gives more information about the status of the delegation. Click the Details button. <div>  </div>

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Delegation Request Details

Gabriel Cole

Chancellor

Request Details	
Transaction:	Multiple Transactions
Proxy:	Gabriel Cole
On Behalf Of:	Emma Maley
Job Title:	Executive Vice Chancellor
From:	02/01/2009
To:	02/15/2009
Notify Delegator of All Transactions for Proxy:	Yes

Request Status	
Request Status:	Accepted
Delegation Status:	Inactive

Request History					
Transaction Name	Trans Type	Request Status	Name	DateTime Stamp	
1 HR_SALCHANGE	Initiate	Submitted	Emma Maley	01/20/09 6:50PM	
2 HR_FULL_PART_CHG	Initiate	Submitted	Emma Maley	01/20/09 6:50PM	
3 HR_REPORT_CHG	Approve	Submitted	Emma Maley	01/20/09 6:50PM	
4 HR_EE_INF_MGR	Initiate	Submitted	Emma Maley	01/20/09 6:50PM	
5 HR_TERM	Initiate	Submitted	Emma Maley	01/20/09 6:50PM	
6 HR_RETIRE	Initiate	Submitted	Emma Maley	01/20/09 6:50PM	
7 HR_REPORT_CHG	Initiate	Submitted	Emma Maley	01/20/09 6:50PM	
8 HR_REPORT_CHG	Initiate	Accepted	Gabriel Cole	01/20/09 7:19PM	
9 HR_TERM	Initiate	Accepted	Gabriel Cole	01/20/09 7:19PM	
10 HR_REPORT_CHG	Approve	Accepted	Gabriel Cole	01/20/09 7:19PM	
11 HR_SALCHANGE	Initiate	Accepted	Gabriel Cole	01/20/09 7:19PM	
12 HR_FULL_PART_CHG	Initiate	Accepted	Gabriel Cole	01/20/09 7:19PM	

Step	Action
15.	<p>The Delegation Request Details page displays the details about the responsibilities you have accepted.</p> <p>Scroll to the bottom of the page to continue the review.</p> <p>Click the scrollbar.</p>
16.	<p>Click the Return button.</p> <div>Return</div>
17.	<p>Congratulations! You have successfully accepted and reviewed your delegated authorities.</p> <p>End of Procedure.</p>