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

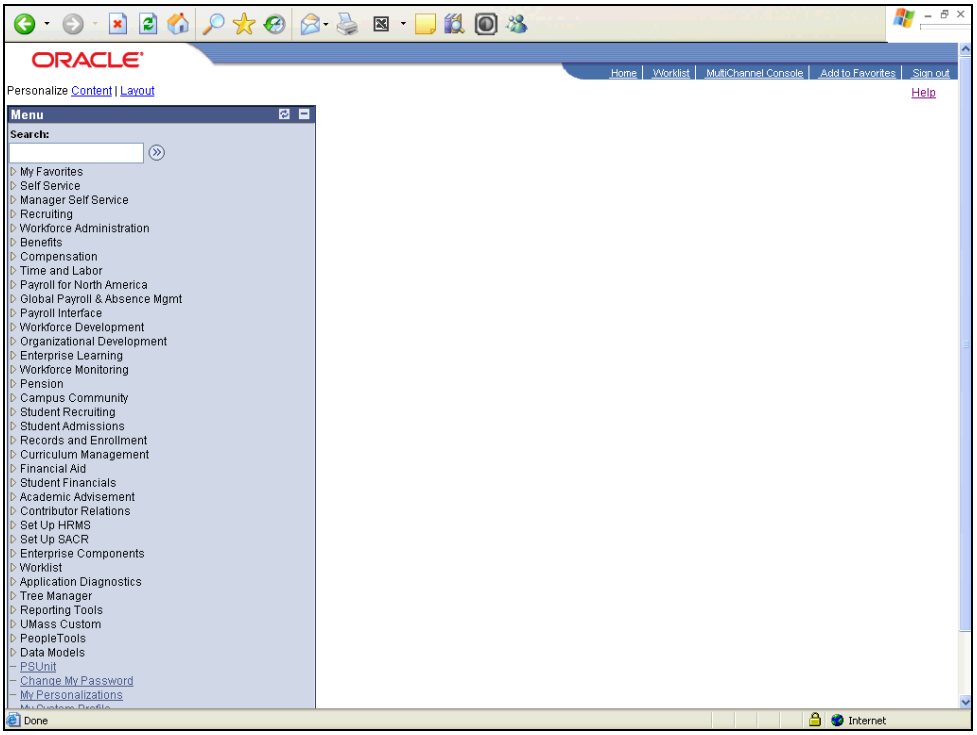
Delegating a Proxy

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.

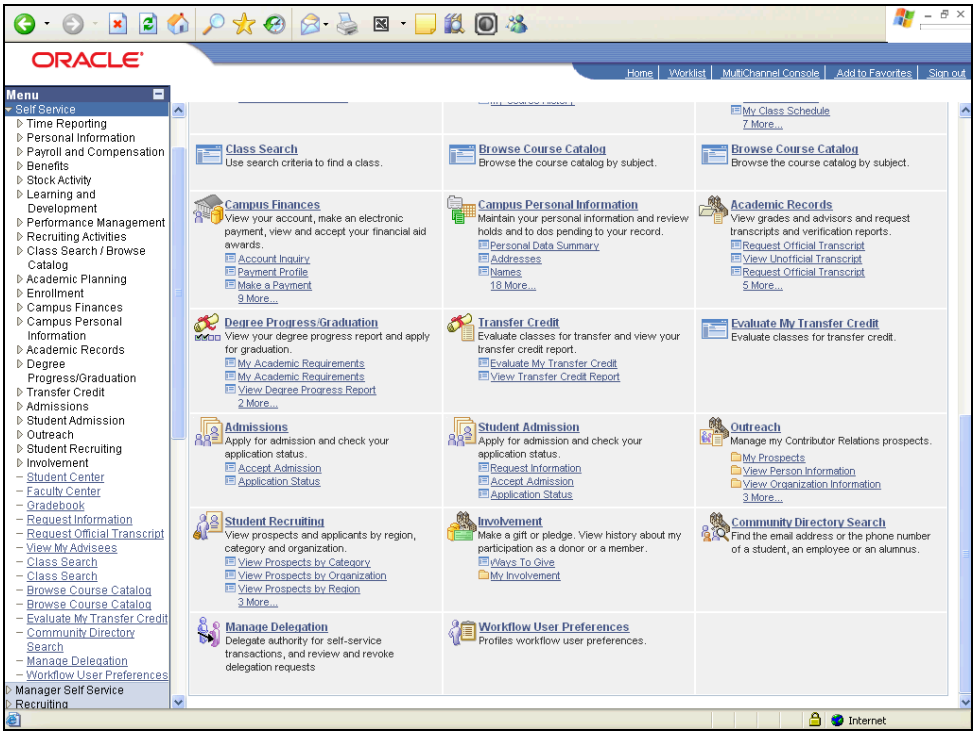
Procedure

Consider this scenario:

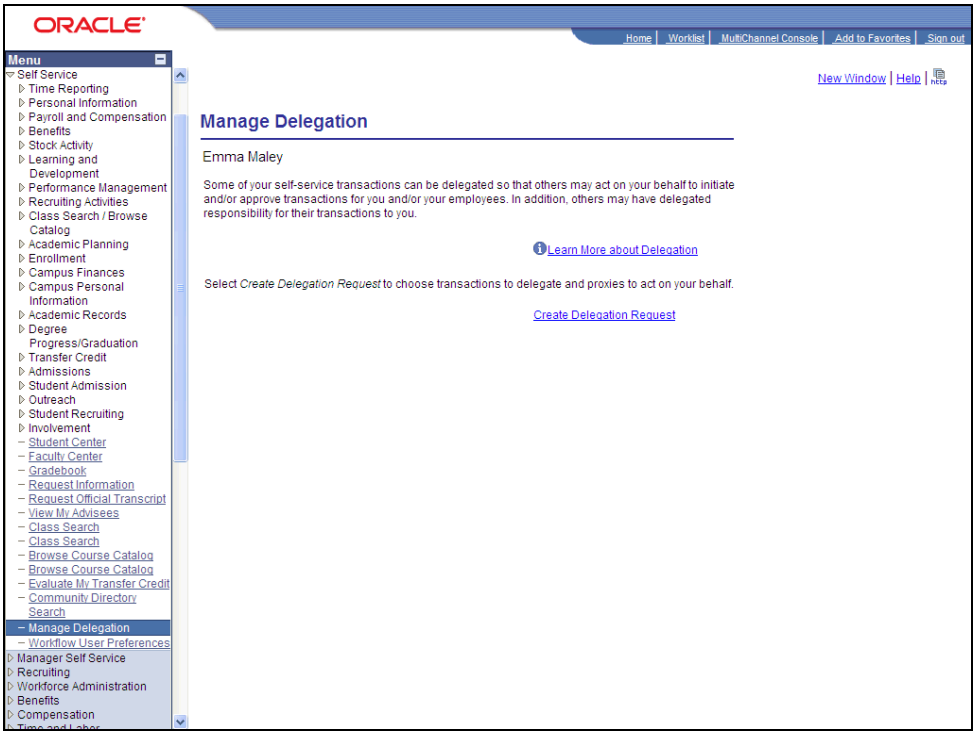
You are planning to be gone for a short period of time and need another manager to monitor your approvals and other required activity while you are away.



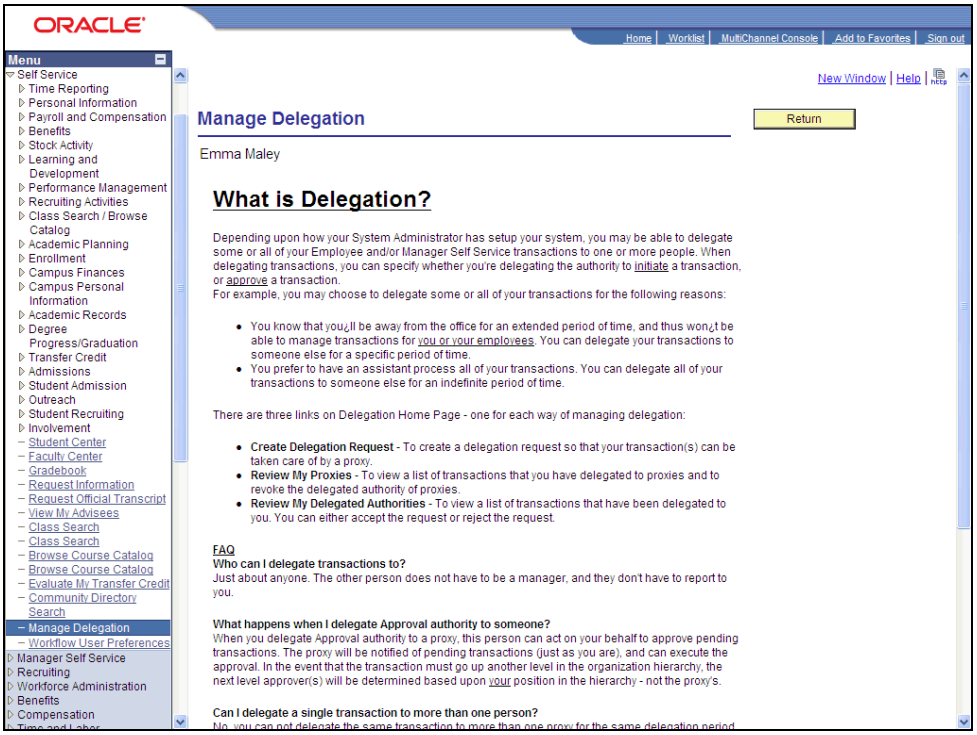
Step	Action
1.	Manage Delegations is in Employee Self Service since not all persons who need to assign proxies are managers. Click the **Self Service** link. ▷ Self Service



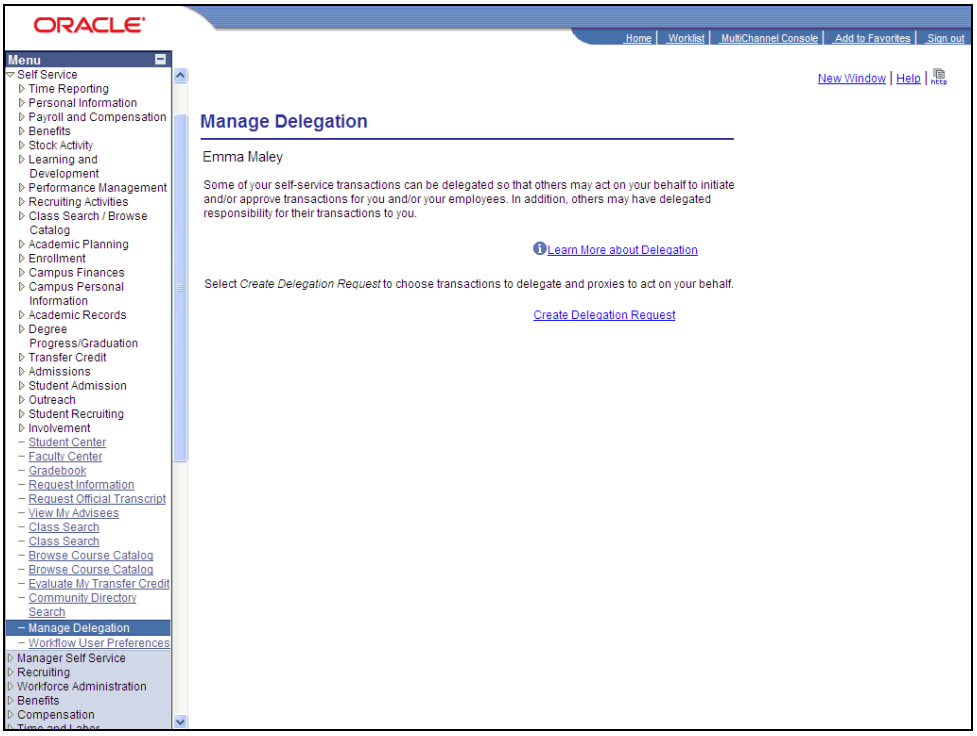
Step	Action
2.	Click the **Manage Delegation** link.



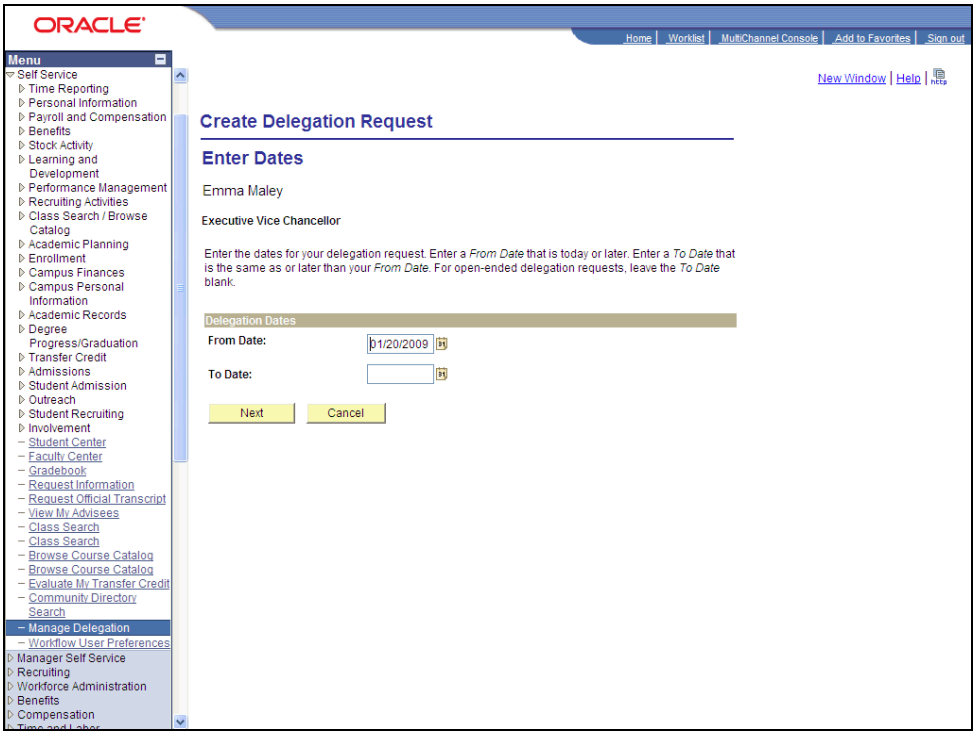
Step	Action
3.	Additional information about managing delegation is available. Click the **Learn More about Delegation** link. Learn More about Delegation



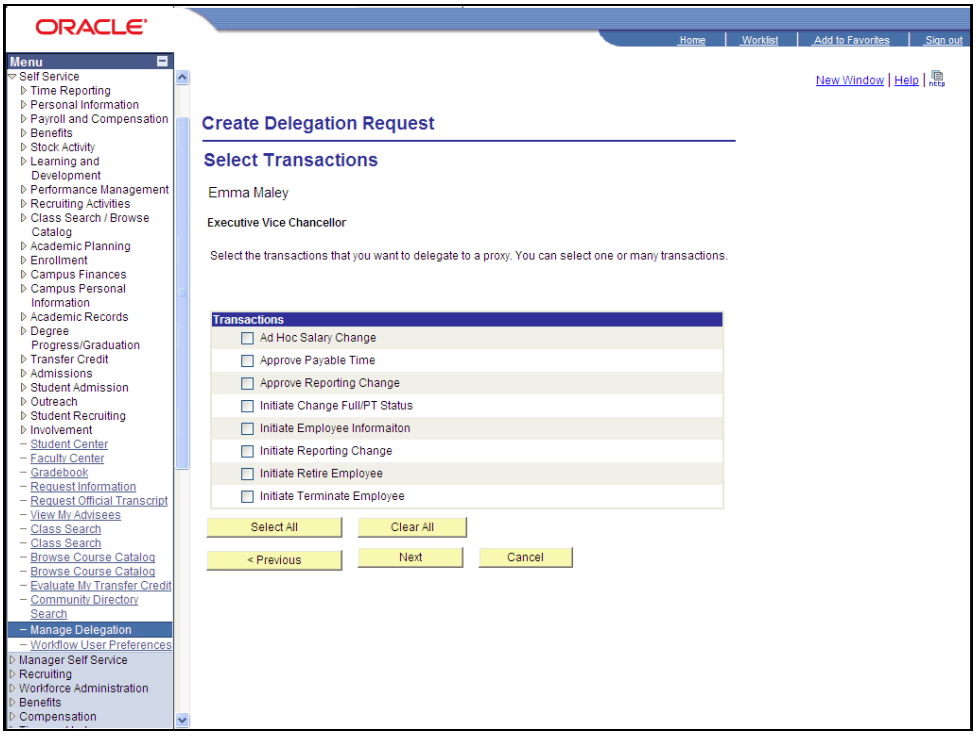
Step	Action
4.	The top half of the page explains how delegation works in the system. Click the scrollbar.
5.	The bottom part of the page displays a FAQ for delegation. Click the **Return** button. Return



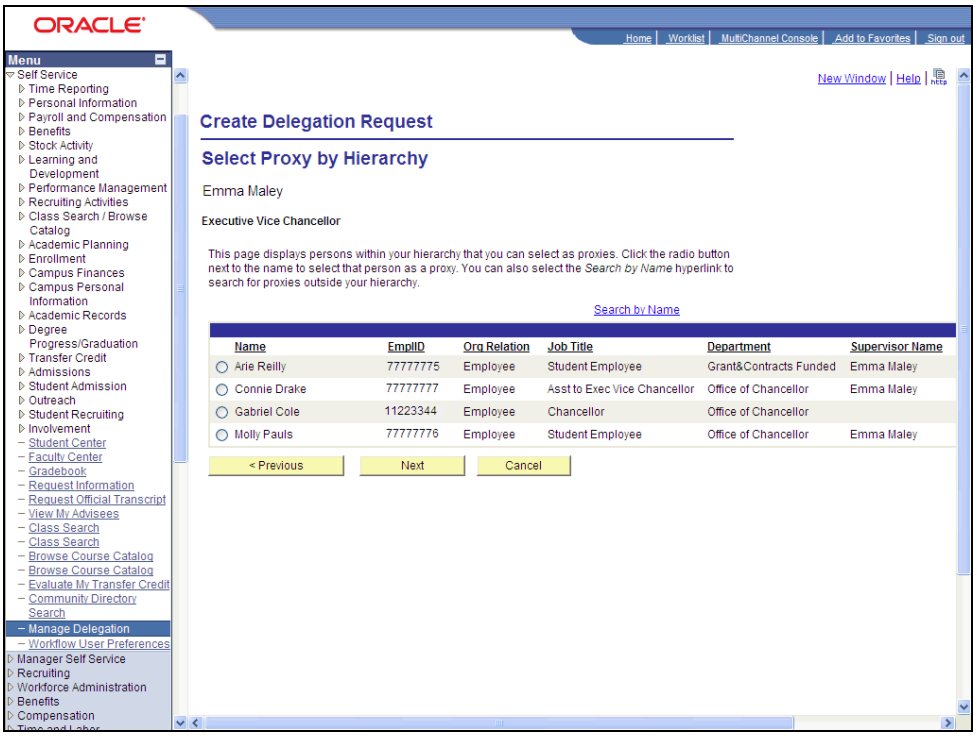
Step	Action
6.	Click the **Create Delegation Request** link. Create Delegation Request



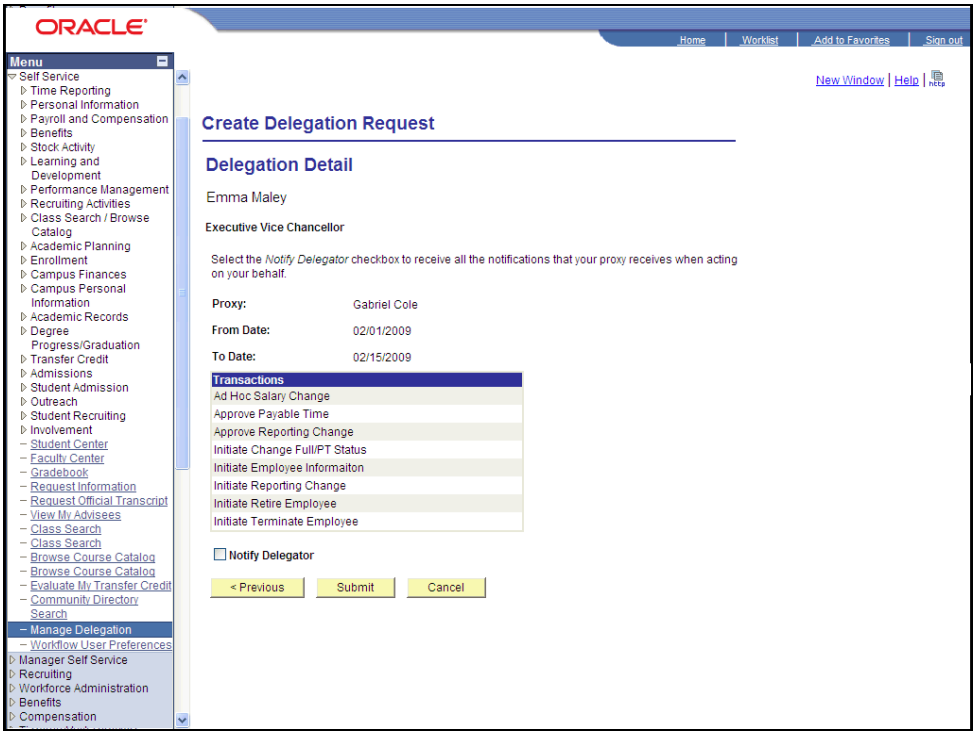
Step	Action
7.	Enter the first date you need someone to monitor your approvals. Enter the desired information into the **From Date:** field. nter "**02012009**".
8.	Enter the last date the proxy will perform these activities. **Note:** This can be open-ended. No *To Date* is required. Enter the desired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



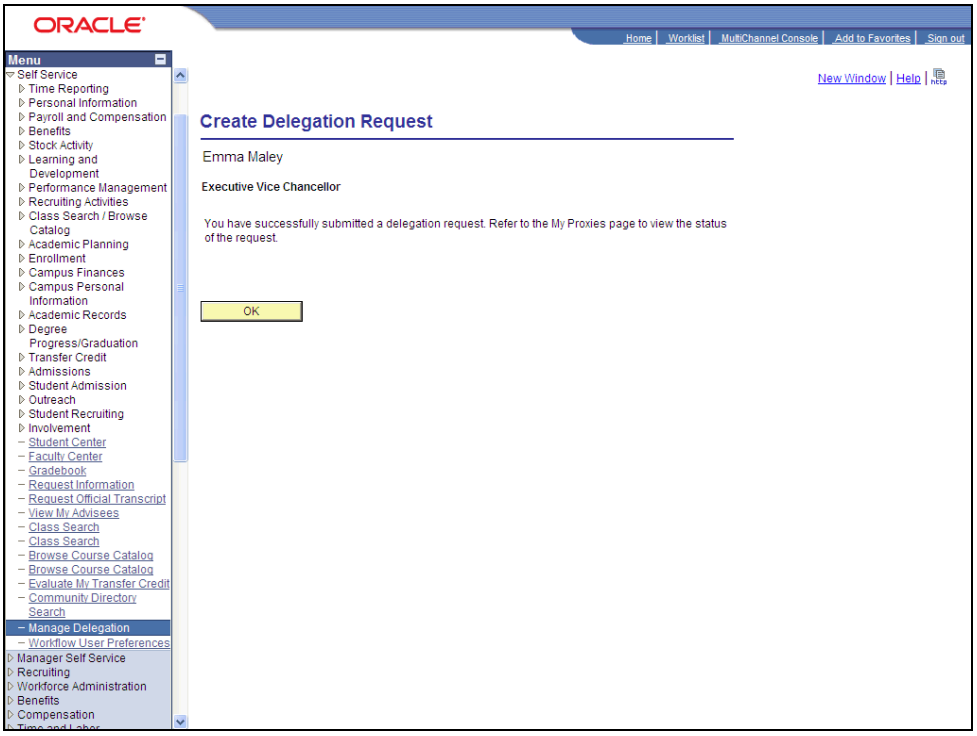
Step	Action
10.	Select the transactions that the proxy will cover. You can turn on individual check boxes for some transactions or use the **Select All** button. Click the **Select All** button. Select All
11.	 Click the **Next** button. Next
12.	The Select Proxy by Hierarchy page is used to select the person to whom you want to assign your proxy. The list that appears are all persons in your reporting chain (upward or downward). You can use the Search by Name hyperlink to find a proxy outside of your reporting chain.
13.	**Decision:** Please make a selection from the options listed below. • 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



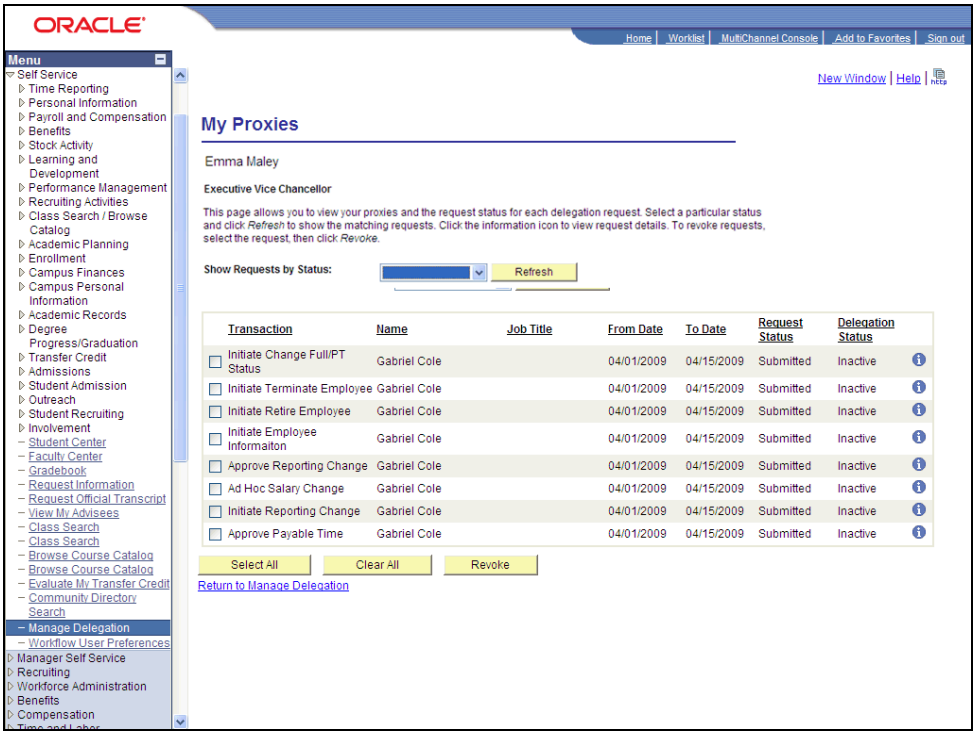
Step	Action
14.	Select the person who will perform these transactions. Click the **Gabriel Cole** option.
15.	Click the **Next** button. Next



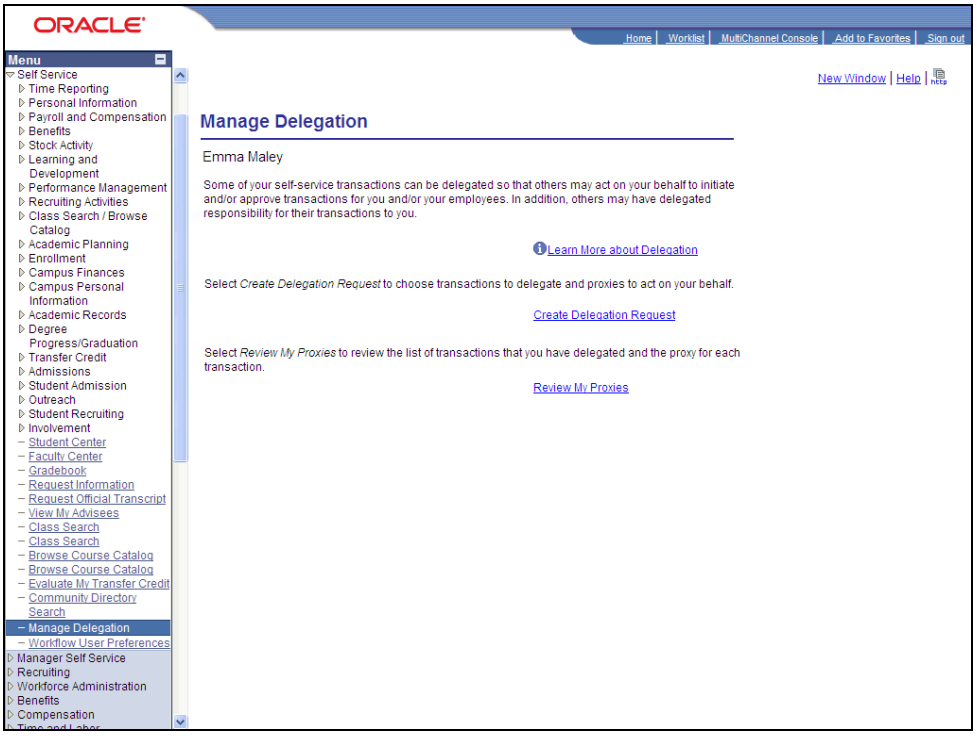
Step	Action
16.	You can review your selections and turn on the **Notify Delegator** check box if you want to receive the same notifications that your proxy gets in your absence. Click the **Notify Delegator** option. ☐
17.	Click the **Submit** button. Submit



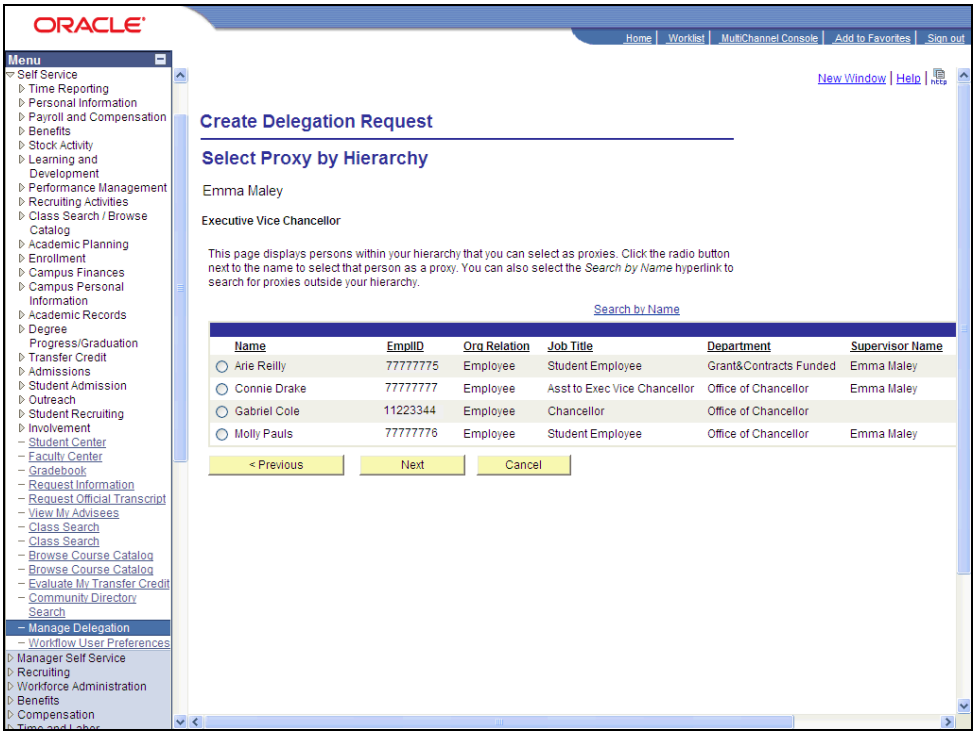
Step	Action
18.	A message appears to verify the submission of the delegation request. Click the **OK** button. OK
19.	The My Proxies page appears for you to review the transactions. You can turn on a checkbox and press **Revoke** for any transactions you do not want this proxy to perform.



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



Step	Action
21.	A new link appears that allows you to return to the My Proxies page to review and/or change the proxies you have created. Click the **Review My Proxies** link. Review My Proxies
22.	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.
23.	Congratulations! You have successfully delegated a proxy. **End of Procedure.** Remaining steps apply to other paths.



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

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.

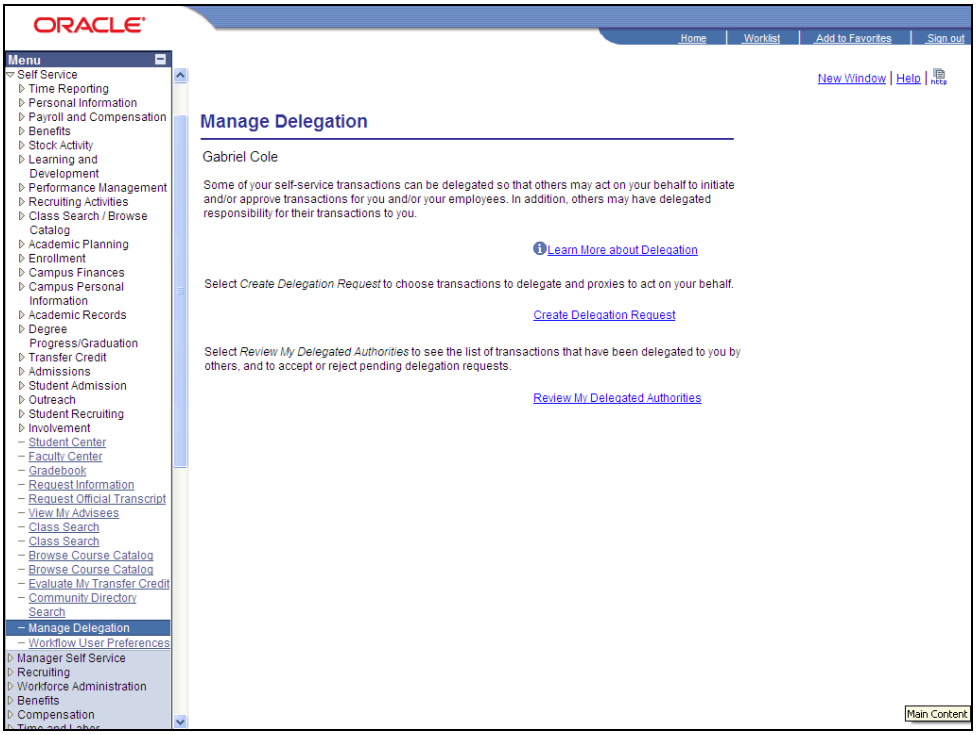
Procedure

Consider this scenario:

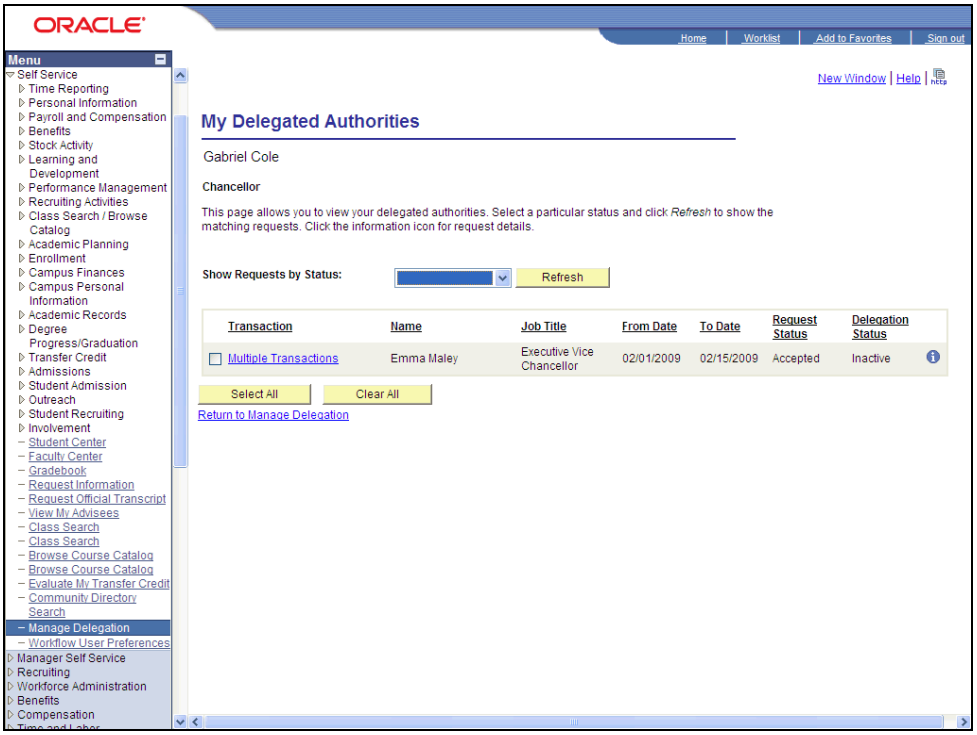
You have been notified that you are to be a proxy for delegated tasks while Emma Maley is away. Access the Manage Delegations page to accept the responsibilities.

Step	Action
1.	Click the **Self Service** link. ▷ Self Service

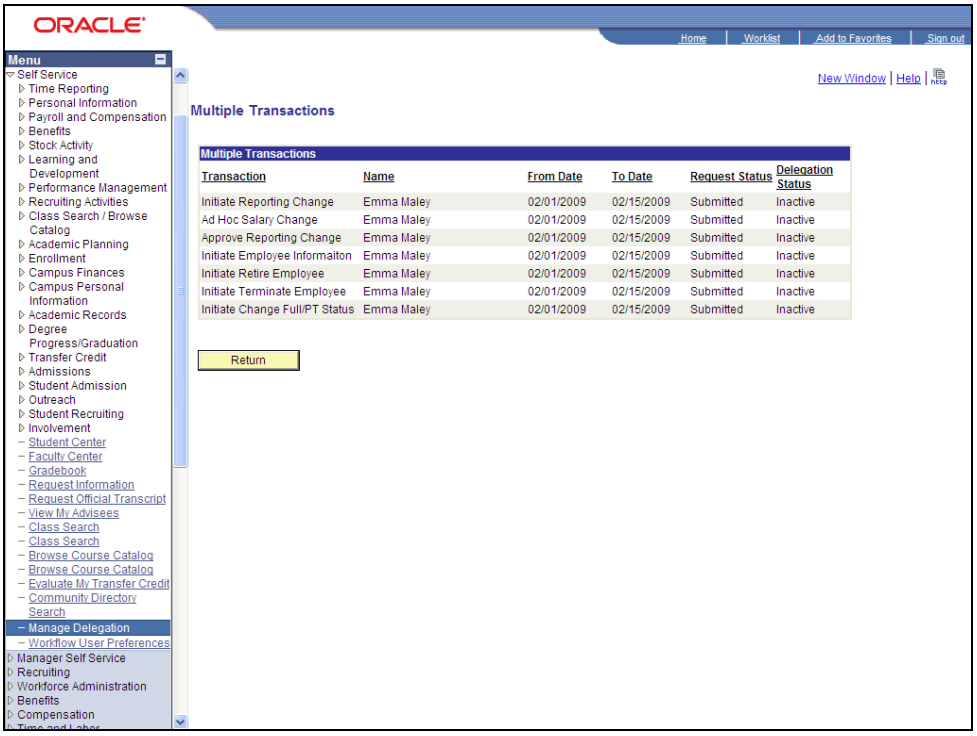
Step	Action
2.	Click the **Manage Delegation** link.



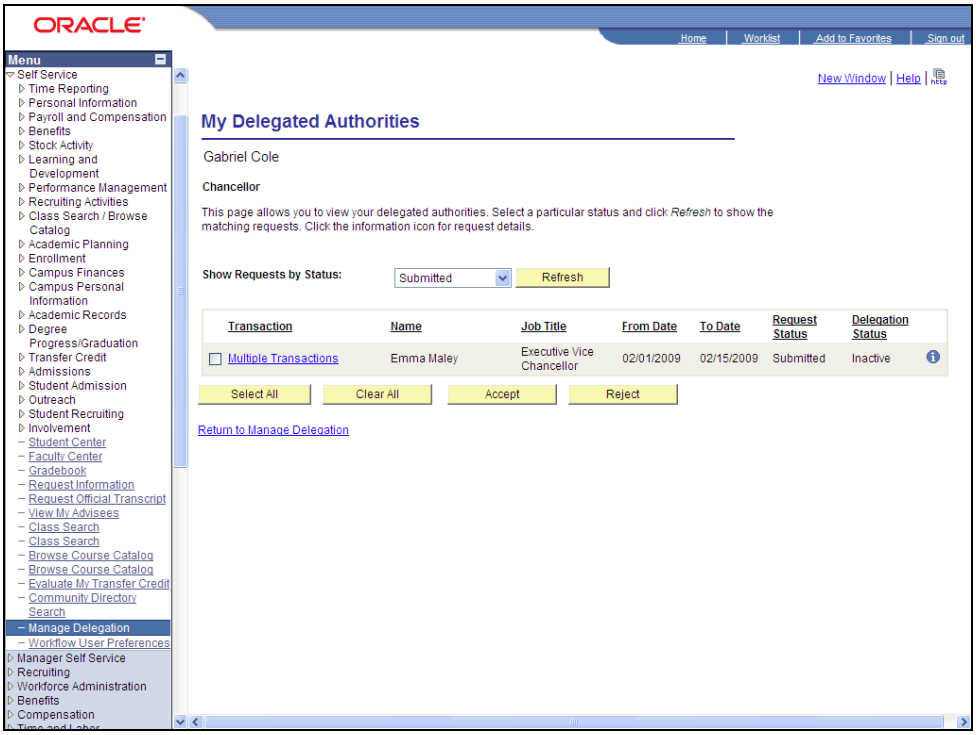
Step	Action
3.	When you have been assigned as a proxy, you will see the *Review My Delegated Authorities* link. Click the **Review My Delegated Authorities** link. Review My Delegated Authorities



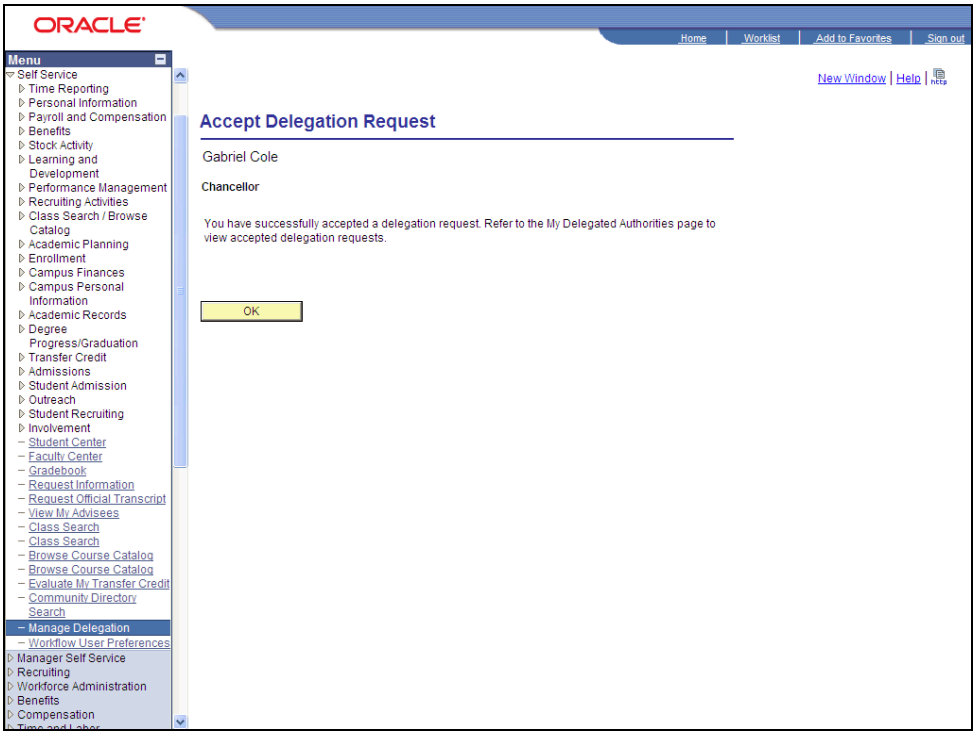
Step	Action
4.	Review the transactions assigned to you. Click the **Transaction** link. Multiple Transactions



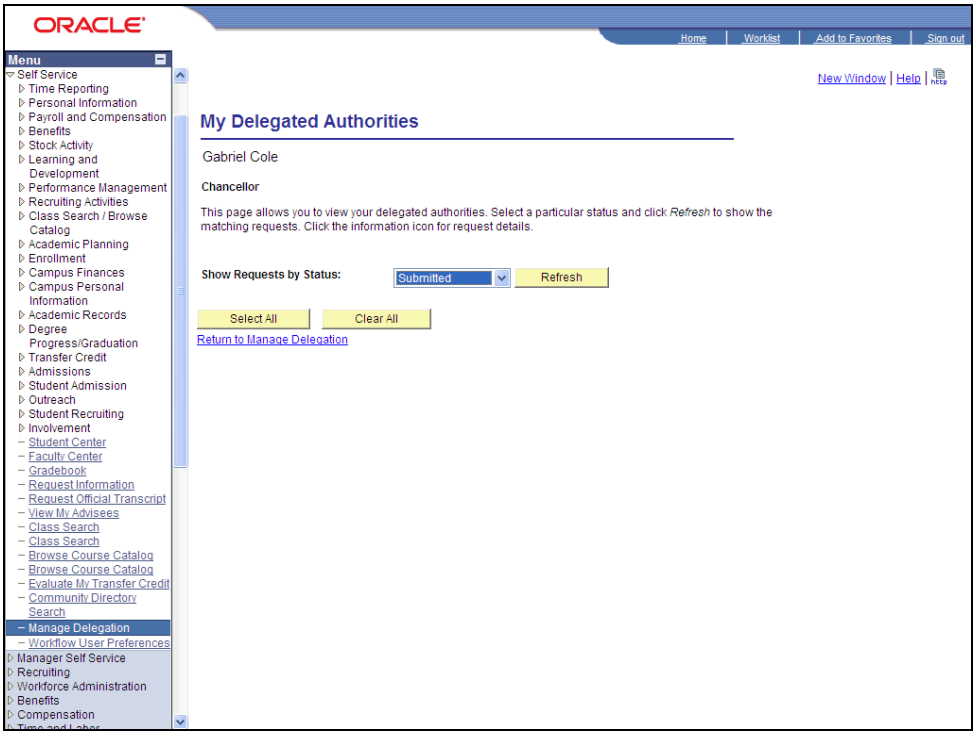
Step	Action
5.	Review the assigned proxy information. Click the **Return** button. Return



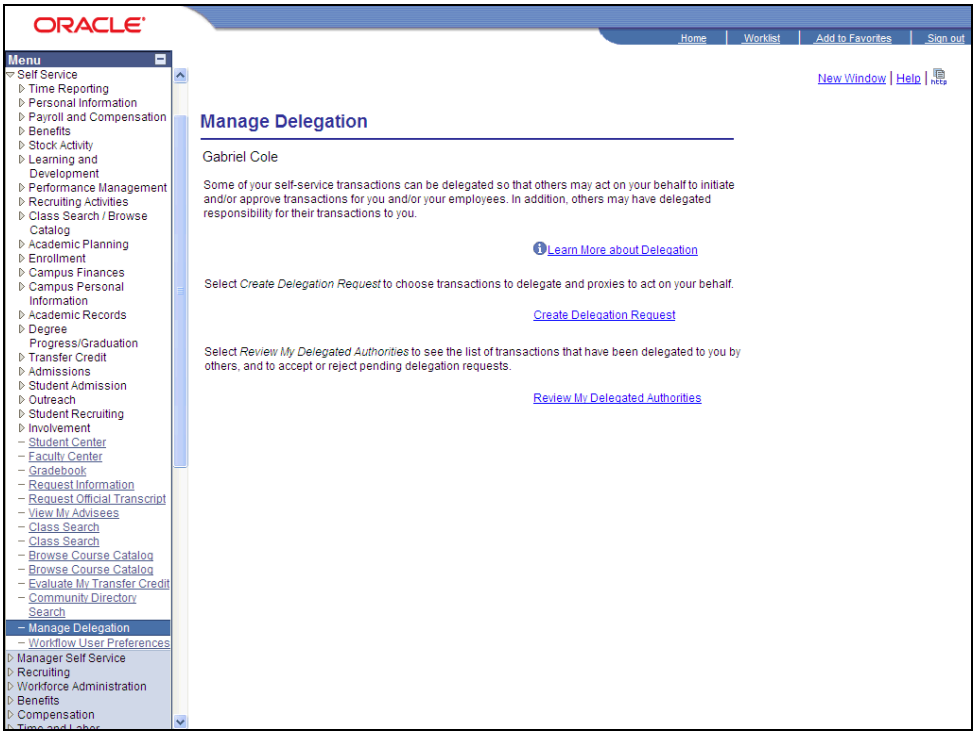
Step	Action
6.	You are now ready to accept the responsibility. Click the **Multiple Transactions** option. ☐
7.	If you choose to decline, you can select the **Reject** button. In this example, you will accept the responsibility. Click the **Accept** button. Accept



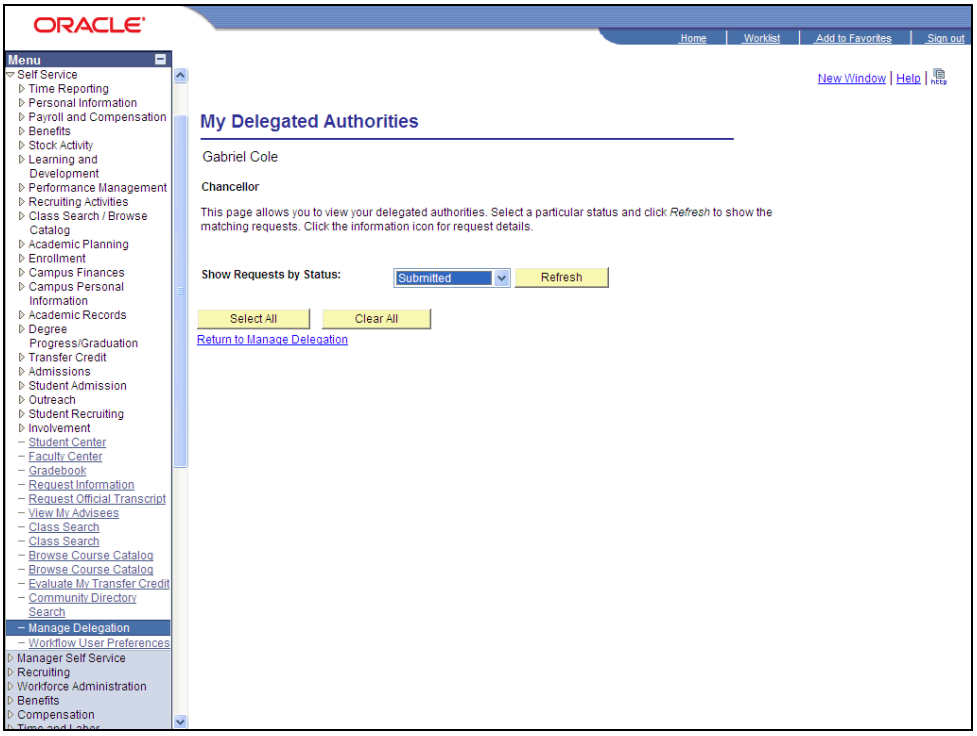
Step	Action
8.	The Accept Delegation Request page verifies your acceptance. Click the **OK** button. OK



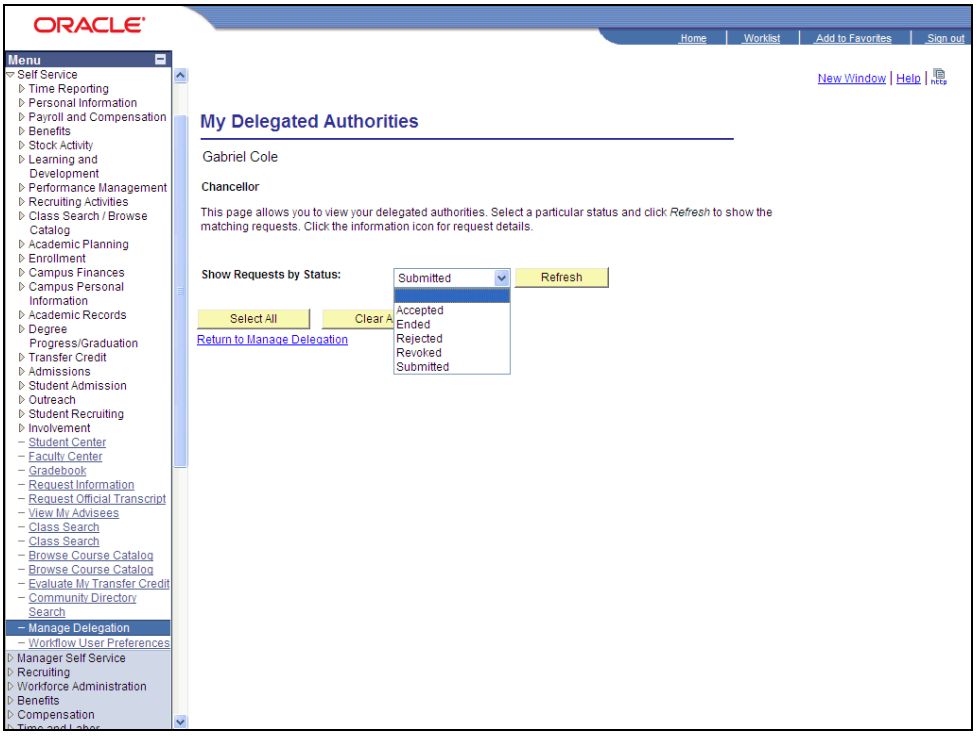
Step	Action
9.	Click the **Return to Manage Delegation** link. Return to Manage Delegation



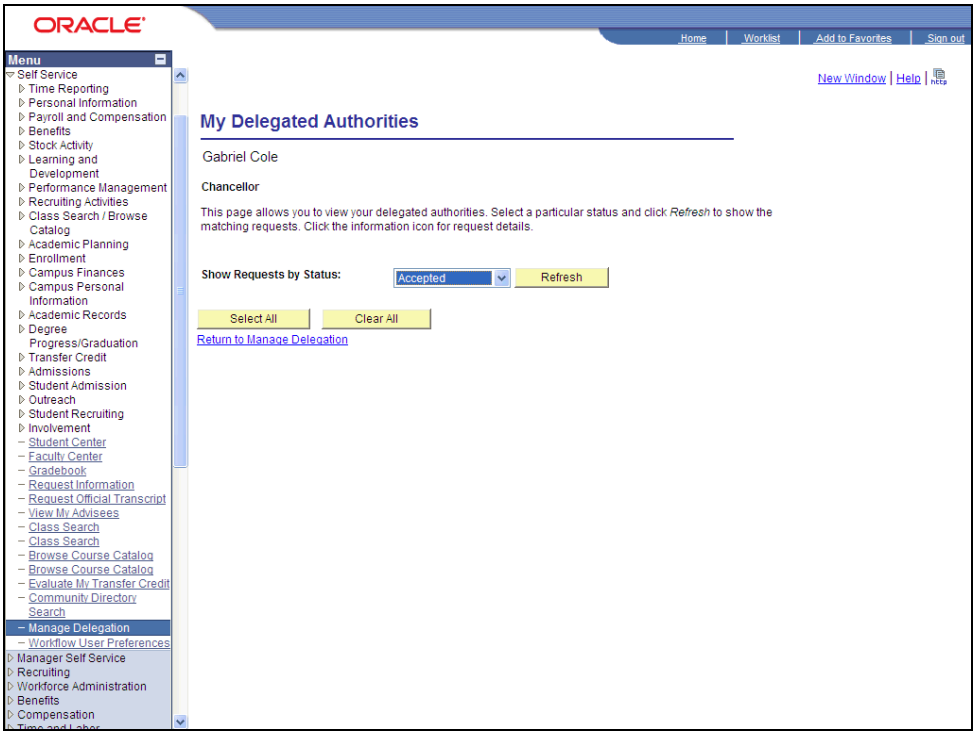
Step	Action
10.	At any time, you may come back to the **Manage Delegation** page to review your delegated authorities. Click the **Review My Delegated Authorities** link. Review My Delegated Authorities



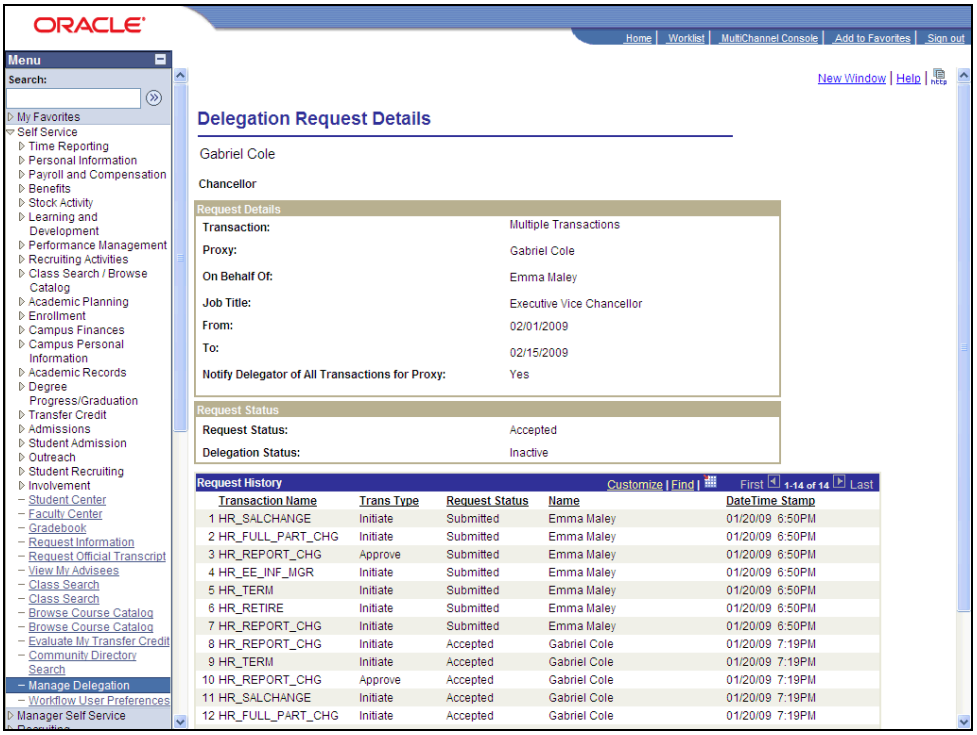
Step	Action
11.	You can select the status that you want to view. Click the **Show Requests by Status** list. Submitted



Step	Action
12.	Click the **Accepted** list item. Accepted



Step	Action
13.	Click the **Refresh** button. Refresh
14.	The information button gives more information about the status of the delegation. Click the **Details** button.



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