Delegation Type Fact Sheet

It is best practice for all delegations to **start 1 day before they are needed** to ensure proper workflow.
The **end date should be set to the day the person returns**.

TYPE	SET UP INSTRUCTIONS	KEY POINTS
APPROVAL DELEGATION (Time Card & Absences) *HCM Module*	**Me** tab – **Roles & Delegations** tile – **Approval Delegation** – Click the **arrow** to expand – Click **Add** – Enter a **Unique Rule Name** and a **Start/End Date** ***Category = Time and Labor OR** ***Category = Global Absences** Select the employee in the **Delegate To** field – **Save** ***If delegating both categories, repeat the process for each.**	• The original approver and delegate should understand the requirements for verifying a transaction (i.e., Financial impact of approving or rejecting a time card). • Delegates should have the capacity to carry out the same level of review as the original approver. • Delegation does not relieve the responsibilities associated with the approver, but rather the ACT of approving. • **Line Manager Role delegation is also required; see below.**
ROLE DELEGATION (Visibility for Team Time Card, Hours Monitor Reports, and Absences) *HCM Module*	**Me** tab – **Roles & Delegations** tile – **Role Delegation** – Click the **Add** button – Enter "**Line Manager**" for the **Rule name**. Enter a **Start/End Date** Select the employee in the **Delegate To** field – **Save**	• Keep in mind, a Role Delegation provides visibility to salary data but does not provide delegation of related tasks. • Discuss the importance of confidentiality BEFORE giving this type of access. • **Approval Delegation may still be required; see above.**
EXPENSE DELEGATION (Expense Report Creation) *Expense Module*	**Me** tab – **Expense** tile – Click the **Gear icon** in the top right corner of the screen – Select **Manage Delegates** – Click the **Plus Sign (+) icon** – Select the M**agnifying Glass icon** – Enter the name of the employee or email – Click **Search** – **Highlight** the person's name – Click **OK** – Click **Save**.	• This delegation allows another person to enter and submit Expense Reports on your behalf. • The employee is still responsible for the data submitted on the expense report.

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TYPE	SET UP INSTRUCTIONS	KEY POINTS
VACATION PERIOD APPROVER ASSIGNMENT (Approval of Travel Authorizations, Expense Reports, Requisitions & Purchase Orders) ***Expense Module Requisition Module*** (Line Manager approvals) ***HCM Module*** (BO or PI for LD approvals) ***Labor Distribution Module***	**Notification bell** icon – **Show All** – **Worklist** – Use the **dropdown menu** in the upper right-hand corner to select **Preferences** – Elect the **Enable vacation period** check box – Add **Start/End Date** – Select **Delegate to** option – Use the search icon to locate the **employee** – **Save**.	• Vacation Period Approver Assignment is intended to be used for a short time while the approver is unavailable; *the **Approval Delegation** on page 1 is intended for longer periods.* • Delegations through the Bell Notifications can be affected by workflow if the original request for approval was submitted before the delegation, or if an item is in a Saved, but not Submitted status, before the delegation. • Delegation can be given to any user within the organization, both upward and downward in the HCM managerial structure. • If the individual to whom the transactions are being delegated already has a delegate, then all approval transactions will be delegated to the last employee. • Using the **My Rule** screen allows you to apply conditional delegations for specific task types.

ROLE DELEGATION (Approval of Expense Reports & Requisitions for FA, FM & BO) ***Expense Module Requisition Module***	**Me** tab – **Roles & Delegations** tile – Scroll down to **Role Delegations** section – Click the **Add** button – Select a **Role** from the dropdown menu – Enter **Start/End Date** – Type an employee name in the **Delegate To** field – **Save**	• Each Role in the dropdown menu needs to be set up.
		• Items started but not submitted before the delegation start date do **not** follow the workflow.
		• Delegations should only be lateral or up – never down.
		  ◦ FA to FA, FA to FM, FA to BO, FM to FM, FM to BO, BO to BO
		  ◦ Not FM to FA, BO to FM, BO to FA
		  ◦ Discuss with BO if a delegation needs to be made outside the unit.
		• See FA-FM-BO Delegation QRG for additional information

For additional questions regarding Delegations, submit a **Service Desk Request**. Include what you are trying to accomplish with the delegation so the staff can properly assist you.

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