

TYPE	SET UP INSTRUCTIONS	KEY POINTS
<p>APPROVAL DELEGATION (Time Card) <i>HCM Module</i></p>	<p>Me tab – Roles & Delegations tile – Approval Delegation – click the arrow to expand – click Add – enter a Unique Rule Name and Start/End Date Category = Time and Labor select the employee in the Delegate To field - Save</p>	<ul style="list-style-type: none"> • The original approver & 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.
<p>ROLE DELEGATION (Visibility for Team Time Card & Hours Monitor Reports) <i>HCM Module</i></p>	<p>Me tab – Roles & Delegations tile – Role Delegation – click the Add button – enter “Line Manager” for the Rule name. enter Start/End Date. select the employee in the Delegate To field – Save</p>	<ul style="list-style-type: none"> • Keep in mind, a Role Delegation <u>will</u> provide visibility to salary data. • Discuss the importance of confidentiality BEFORE giving this type of access.
<p>EXPENSE DELEGATION (Expense Report Creation) <i>Expense Module</i></p>	<p>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 Magnifying Glass icon – enter the name of the employee or email – click Search – Highlight the person’s name – click OK – click Save.</p>	<ul style="list-style-type: none"> • 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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<p>VACATION PERIOD APPROVER ASSIGNMENT (Approval of Expense Reports, Requisitions & Purchase Orders) <i>Expense Module</i> <i>Requisition Module</i> (Line Manager approvals) <i>HCM Module</i> (URA, BO, or PI for LD approvals) <i>Labor Distribution Module</i></p>	<p>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.</p>	<ul style="list-style-type: none"> • Vacation Period Approver Assignment is <u>intended to be used for a short time while the approver is unavailable</u>; <i>the Approval Delegation is intended for longer periods.</i> • 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 which 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.
<p>ROLE DELEGATION (Approval of Expense Reports & Requisitions for FA, FM & BO) <i>Expense Module</i> <i>Requisition Module</i></p>	<p>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</p>	<ul style="list-style-type: none"> • Each Role in the dropdown menu needs to be set up. • Items started, but not submitted before the delegation start date will not follow the workflow. • Delegations should only be lateral or up – never down. <ul style="list-style-type: none"> • 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 an **Ignite Service Desk Request**. Include what you are trying to accomplish with the delegation so the staff can direct you appropriately.