

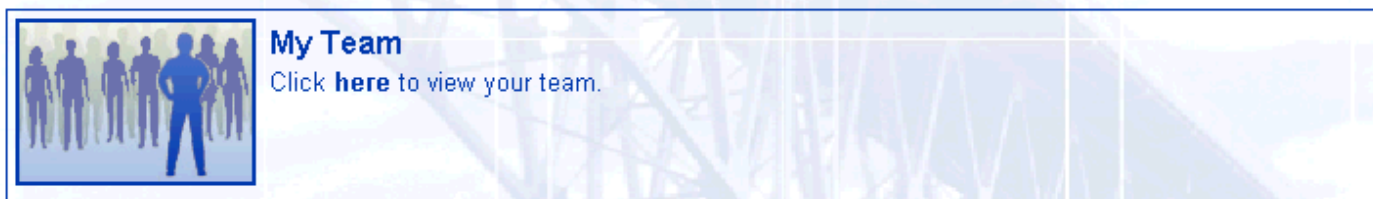
User Guide – Manager Delegations

As an authorising Manager, there may be occasions when absent from the workplace you may wish to delegate your responsibility to a colleague.

To do this.....

The following screens outline how to set up and delete manager delegation rules.

Select 'My Team'



Select 'Delegation of Responsibility and Auth' from 'Modules' on the right hand side of the page.

Manager Summary
To view all your staff on the planner click "Select All" and then "Planner".
To view a selection of staff check their individual box and then "Planner".
To view an individual's employment details click on an employee's name.

Authorisations: 1

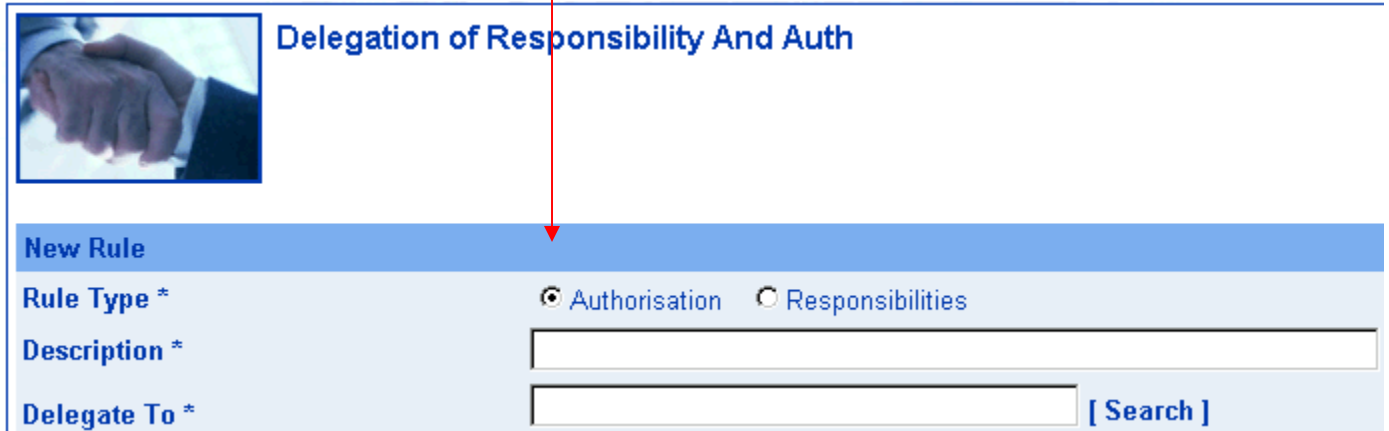
Team[Select All][Deselect All]
+ RALPH EDWARDS (Post No: 1273, Post Desc: HEAD OF HR)

Modules
Delegation of Responsibility And Auth
Health, Disciplinary and Capability
Manager Reports
Planner

Select **[Add New]**



Select whether you are delegating 'Authorisation' or 'Responsibility'.
Enter a meaningful description i.e. Annual Leave
Search for the person you are going to delegate to by clicking on **[Search]**.



There are a number of ways to select the person you are delegating to:

Select 'Direct Reports Only', then [Search]

- >All employees that report directly to you will be displayed.
- >Select the person then click on **[Continue]**.

Or

Using Advanced Search

- >Enter details (i.e. Surname / First name) then click on **[Search]**
- > Select the person then click on **[Continue]**.

To identify 'Delegate For' click on **[select]**

You now are required to select by one of three methods. Depending on which you select, the lists presented will identify staff that fall beneath you in the authorisation chain.

Click on **[Continue]**

| | | |
|-----------------------|--------------------------------------|----------------------------|
| Delegate To * | STUART BULL | [Search] |
| Delegate For * | Direct Reports of HR SYSTEMS OFFICER | |
| | | [Select] |

To identify 'Module/Process Group' click on **[select]**

Select the Modules and Process Groups that you wish to delegate.
[\[Select All \]](#) [\[Deselect All \]](#)

| |
|--|
| <input checked="" type="checkbox"/> Expense Claims |
|--|

[\[Back \]](#) [\[Continue \]](#)

Please Note: You are permitted to select one or more module / process when displayed..

Click on **[Continue]**

To set the period of delegation, select the relevant dates from the calendars.

Do not select the absence button

By selecting 'Suppress Authorisation and Emails' will prevent any workflow emails being copied to you during this period.

Select **[Save]**

| | | |
|--|--------------------------|--|
| From Date | <input type="text"/> | |
| To Date | <input type="text"/> | |
| Absence | <input type="checkbox"/> | |
| Suppress Authorisation & Emails | <input type="checkbox"/> | |

[\[Back \]](#) [\[Save \]](#)

A confirmation message will now be displayed

| | |
|--|--|
| | Confirmation Message Successfully created your delegation record |
|--|--|

[\[Continue \]](#)