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Delegation Overview
Delegation is when a person authorizes another to serve as his or her representative for a particular task of responsibility. With the eForms Delegation feature, users can authorize other users to perform approval tasks on their behalf by delegating authority to approve eForms transactions. Once a user delegates their authority, they will be unable to approve eForms as themselves, as they have relinquished their authority.

Delegation Terminology
The following items are important to the understanding of the Delegation feature and are used throughout these topics.

<table>
<thead>
<tr>
<th>Delegation</th>
<th>The act of delegating one’s authority to another user</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delegator</td>
<td>A person that delegates authority to another user</td>
</tr>
<tr>
<td>Proxy</td>
<td>A person granted authority to act on behalf of another user</td>
</tr>
<tr>
<td>Delegate Authority</td>
<td>The rights and privileges that are delegated from the delegator to the proxy</td>
</tr>
<tr>
<td>Delegation Request</td>
<td>A request from the delegator to the proxy to take on delegated authority</td>
</tr>
<tr>
<td>Delegation Period</td>
<td>The time range in which the delegated authority is in effect</td>
</tr>
<tr>
<td>Delegation Administrator</td>
<td>The system administrator who is responsible for configuring, managing, and maintaining delegated authorities</td>
</tr>
<tr>
<td>Revoke</td>
<td>When a delegator or delegation administrator withdraws delegated authority</td>
</tr>
</tbody>
</table>

Delegation Processing
To implement delegation, the authorizing user must create the request, which will route to the proxy. The Proxy will then need to accept the request in order for the delegation to take effect. When the delegation request is processed and accepted by the Proxy, the delegation platform will remove the eForms Approver Role from the delegator, and grant a Proxy Approver role to the Proxy. This will effectively remove the ability for the Delegator to approve eForms actions.

Create Delegation Request
The first step in processing delegation, is for the Delegator (the user who will be relinquishing their eForms approval authority to a Proxy) to create the request, which will be sent to the Proxy for acceptance.

Navigation: Main Menu > Self Service > Manage Delegation
1. Navigate to the **Manage Delegation** page

2. On the **Manage Delegation** page, click on the **Create Delegation Request** link
3. Enter the dates of the delegation period and click Next. The delegation will activate/inactivate based on the period indicated. If the delegation period is indefinite, leave the To Date blank. *Note – the delegation period cannot be backdated. From date must be equal to or greater than the current date.

4. Select eForms: Form Approvals, then click Next.
5. Enter the **Last Name** and **First Name** of the Proxy. You can search for an employee by clicking the magnifying glass. Then click **Search**.

6. Select the **Delegate**, then click **Next**
7. Once the Proxy and delegation dates are verified, click **Submit**.

8. Click **Submit** to complete the process. This will complete the process and send the delegation request to the Proxy.

Once the delegation request is accepted by the Proxy, it will successfully remove all eForms approval authority from the Delegator. Therefore, the Delegator will no longer be able to approve any eForms actions.

**Accepting Delegation Request**

Once the Delegator submits the Delegation Request, the identified Proxy will receive notifications to either Accept or Reject the request.

**Navigation:** Main Menu > Self Service > Manage Delegation
1. **Navigate to the Manage Delegation page**

   ![Navigate to Manage Delegation](image1)

2. **On the Manage Delegation page, click on the Review My Delegated Authorities link**

   ![Review My Delegated Authorities](image2)
3. After the delegation information has been reviewed, select the **eForms** transaction, and click **Accept**

Once the Proxy has accepted the delegation, eForms will display their name as the approver on current eForms requests. The Delegator will no longer have access to approve as themselves.
Revoke Delegation
Based on the delegation period of the delegation request, the delegation will automatically inactivate. However, the Delegator can revoke the delegation from the Proxy, which would take effect immediately. When the Revoke is processed, the Proxy Approval role is removed immediately from the Proxy and approval authority is given back to the Delegator.

**Navigation:** Main Menu > Self Service > Manage Delegation

1. Navigate to the **Manage Delegation** page
2. Click on **Review My Proxies**

![Manage Delegation](image)

**Manage Delegation**

Samantha Hernandez

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](image)

2. **Review My Proxies**

3. Click on the **eForms** transaction, then click **Revoke**

![My Proxies](image)

**My Proxies**

Samantha Hernandez

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

![Choose Delegate](image)

**Choose Delegate**

Transaction | Name | Job Title | From Date | To Date | Request Status | Delegation Status | Details
--- | --- | --- | --- | --- | --- | --- | ---
**eForms: Form Approvals** | Jennifer Evetta | HUMAN RESOURCES SPEC II | 05/16/2018 | 06/30/2018 | Accepted | Active | 

3. **Revoke**
4. Click **Yes – Continue** to process the revoke request

5. Click **Ok** to finalize the process