



Delegation Guide

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Delegation Overview

Delegation is when a person authorizes another to serve as a 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.

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

Delegation Processing

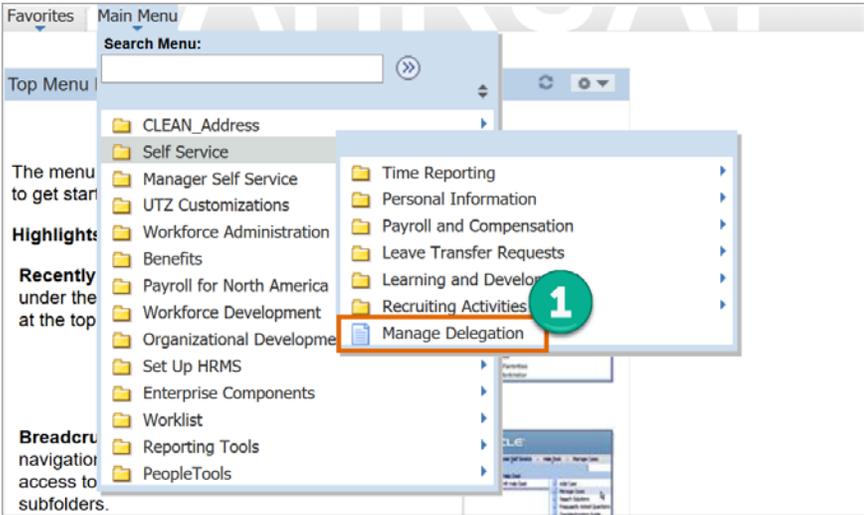
To implement delegation, the authorizing user must create the request, which will route to the proxy. The Proxy will then need to accept the request in order for the delegation to take effect. When the delegation request is processed and accepted by the Proxy, the delegation platform will remove the 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

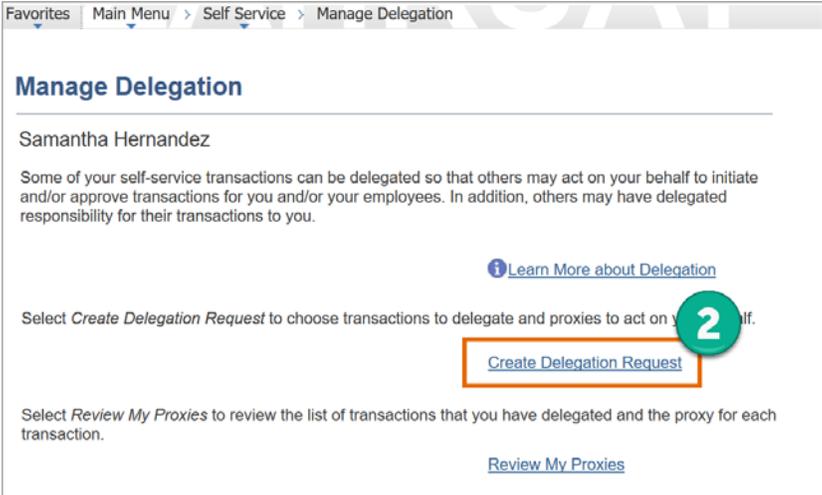
The first step in processing delegation, is for the Delegator (the user who will be relinquishing their eForms approval authority to a Proxy) to create the request, which will be sent to the Proxy for acceptance.

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.

Favorites | Main Menu > Self Service > Manage Delegation

Create Delegation Request

Enter Dates

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Enter the dates for your delegation request. Enter a *From Date* that is today or later. Enter a *To Date* that is the same as or later than your *From Date*. For open-ended delegation requests, leave the *To Date* blank.

Delegation Dates

From Date: 05/15/2018

To Date: 06/30/2018

Next Cancel

- 4. Select **eForms: Form Approvals**, then click **Next**.

Favorites | Main Menu > Self Service > Manage Delegation

Create Delegation Request

Select Transactions

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Select the transactions that you want to delegate to a proxy. You can select one or many transactions.

Delegate Transactions	
Transaction	
<input type="checkbox"/> TL reported Time	
<input checked="" type="checkbox"/> eForms: Form Approvals	

Select All Deselect All

Previous Item Next Cancel

- 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**.

Favorites Main Menu > Self Service > Manage Delegation

Create Delegation Request

Select Proxy by Name

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Search for a proxy using their name. You can also select the [Search By Hierarchy](#) hyperlink to search for your proxy.

Last Name:

First Name:

Choose Delegate

Name	Empl ID	Org Relation	Job Title	Department	Supervisor Name
<input type="radio"/>					

< Previous Next Cancel

- 6. Select the **Delegate**, then click **Next**

Favorites Main Menu > Self Service > Manage Delegation

Create Delegation Request

Select Proxy by Name

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Search for a proxy using their name. You can also select the [Search By Hierarchy](#) hyperlink to search for your proxy.

Last Name:

First Name:

Choose Delegate

Name	Empl ID	Org Relation	Job Title	Department	Supervisor Name
<input checked="" type="radio"/> Jennifer Evetts	6001020662	Employee	HUMAN RESOURCES SPEC II	HUMAN RESOURCE SERVICES	Ronald Fosmire

< Previous Next Cancel

7. Once the Proxy and delegation dates are verified, click **Submit**.

Favorites Main Menu > Self Service > Manage Delegation

Create Delegation Request

Delegation Detail

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Proxy: Jennifer Evetts
From Date: 05/15/2018
To Date: 06/30/2018

Transactions
eForms: Form Approvals

Submit Previous Cancel

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

Favorites Main Menu > Self Service > Manage Delegation

Create Delegation Request

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You have successfully submitted a delegation request. Refer to the My Proxies page to view the status of the request.

OK

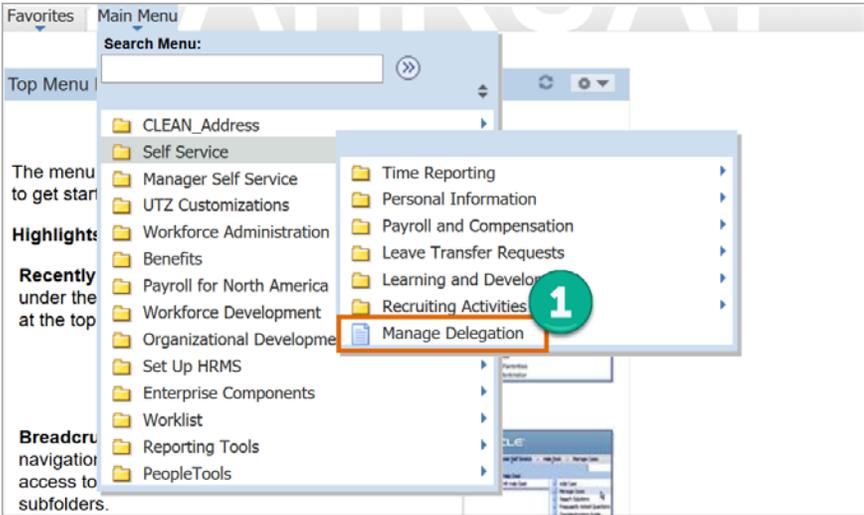
Once the delegation request is accepted by the Proxy, it will successfully remove **all** eForms approval authority from the Delegator. Therefore, the Delegator will no longer be able to approve any eForms actions.

Accepting Delegation Request

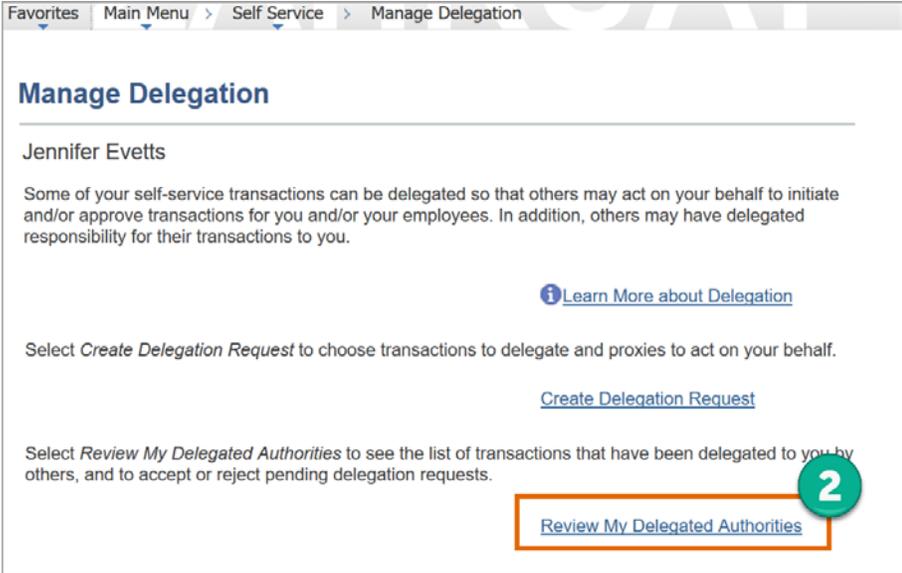
Once the Delegator submits the Delegation Request, the identified Proxy will receive notifications to either Accept or Reject the request.

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

1. Navigate to the **Manage Delegation** page



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



- After the delegation information has been reviewed, select the **eForms** transaction, and click **Accept**

My Delegated Authorities

Jennifer Evetts

HUMAN RESOURCES SPEC II

This page allows you to view your delegated authorities. Select a particular status and select *Refresh* to show the matching requests. Select the information icon for request details.

Show Requests by Status: Submitted

Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
<input checked="" type="checkbox"/> eForms: Form Approvals	Samantha Hernandez	LEAD HR SPECIALIST	05/15/2018	06/30/2018	Submitted	Inactive	i

Select All Deselect All

[Return to Manage Delegation](#)

- Click **Ok** to complete the process

Accept Delegation Request

Jennifer Evetts

HUMAN RESOURCES SPEC II

You have successfully accepted a delegation request. Refer to the My Delegated Authorities page to view accepted delegation requests.

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.

All Forms Except APT & ADP

Approved
[Chunjian Qian](#)
 Department Head/Manager
 05/16/18 - 10:27 AM

Funding Approvals

REQUEST_ID=00002447:Approved

Funding Approvals

Auto Approved
[Chunjian Qian](#)
 FMS Cost Center Approver
 05/16/18 - 10:27 AM

Business Office Approvals

REQUEST_ID=00002447:Pending

Faculty/Student Positions

Approved
[Brenda Clarke](#)
 Budget Office
 05/16/18 - 10:27 AM

Pending
[Jennifer Evetts for Samantha Hernandez](#)
 HR Day One

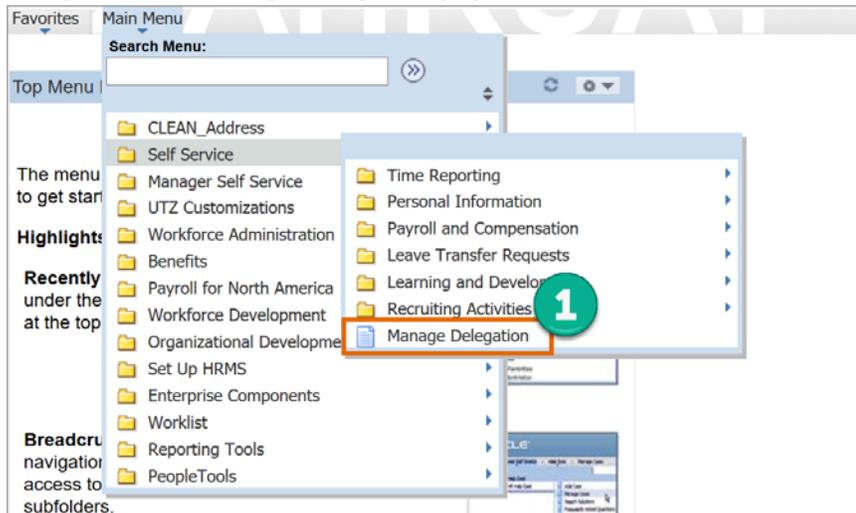
Save Submit Approve Deny CallBack Sendback Cancel Copy...

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**

Favorites Main Menu > Self Service > Manage Delegation

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 a proxy for each transaction.

[Review My Proxies](#)

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

Favorites Main Menu > Self Service > Manage Delegation

My Proxies

Samantha Hernandez

LEAD HR SPECIALIST

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*.

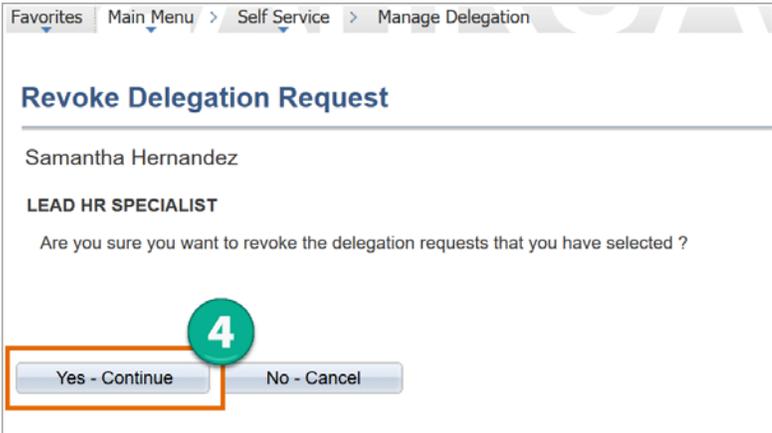
Show Requests by Status: [Refresh](#)

Choose Delegate							
Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
<input checked="" type="checkbox"/> eForms: Form Approvals	Jennifer Evetts	HUMAN RESOURCES SPEC II	05/16/2018	06/30/2018	Accepted	Active	i

[Select All](#) [Deselect All](#) [Revoke](#)

[Return to Manage Delegation](#)

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



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

