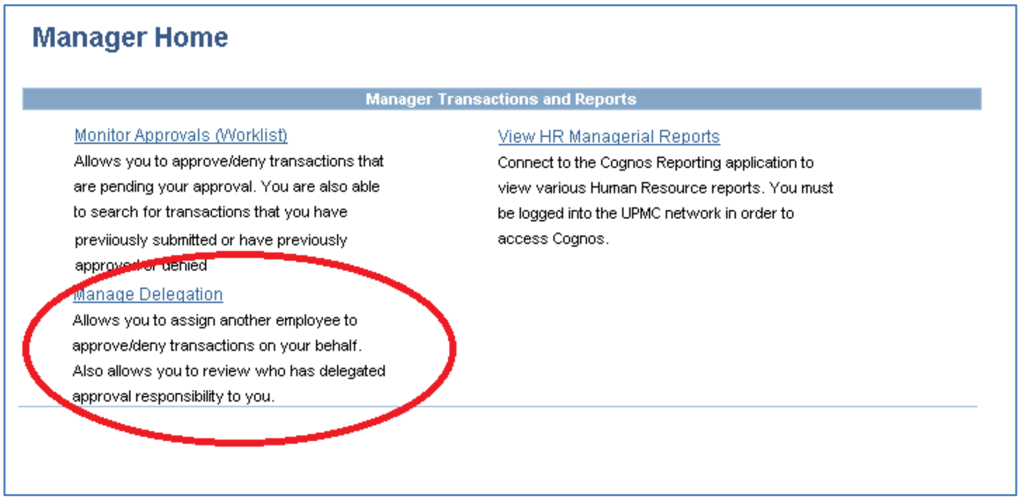
Delegation for Approving
Human Resources Transactions on My HUB

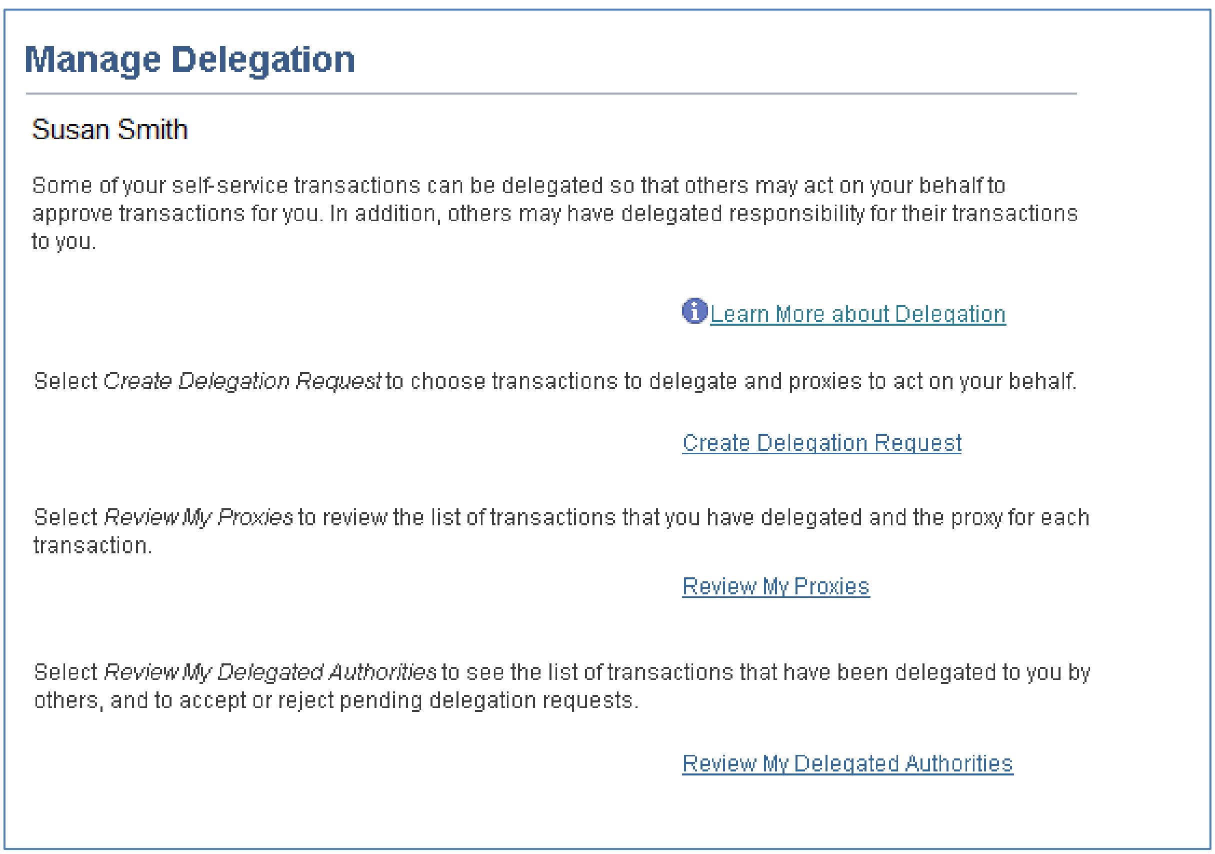
March 2013

Manage Delegation Introduction

The Assign a Delegate page is being replaced by the new Manage Delegation page on My HUB. This new page offers the ability to:

- Submit new delegation requests.
- View and revoke active and pending delegates (proxies).
- Accept pending delegation requests and view active delegated authorities.

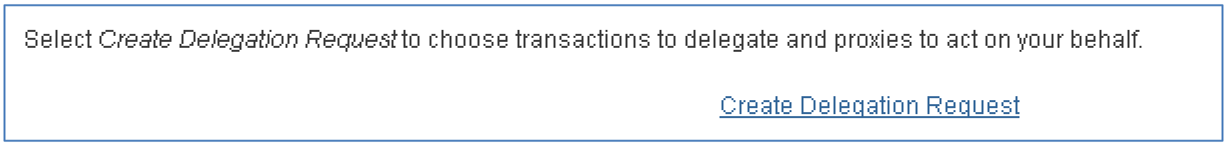




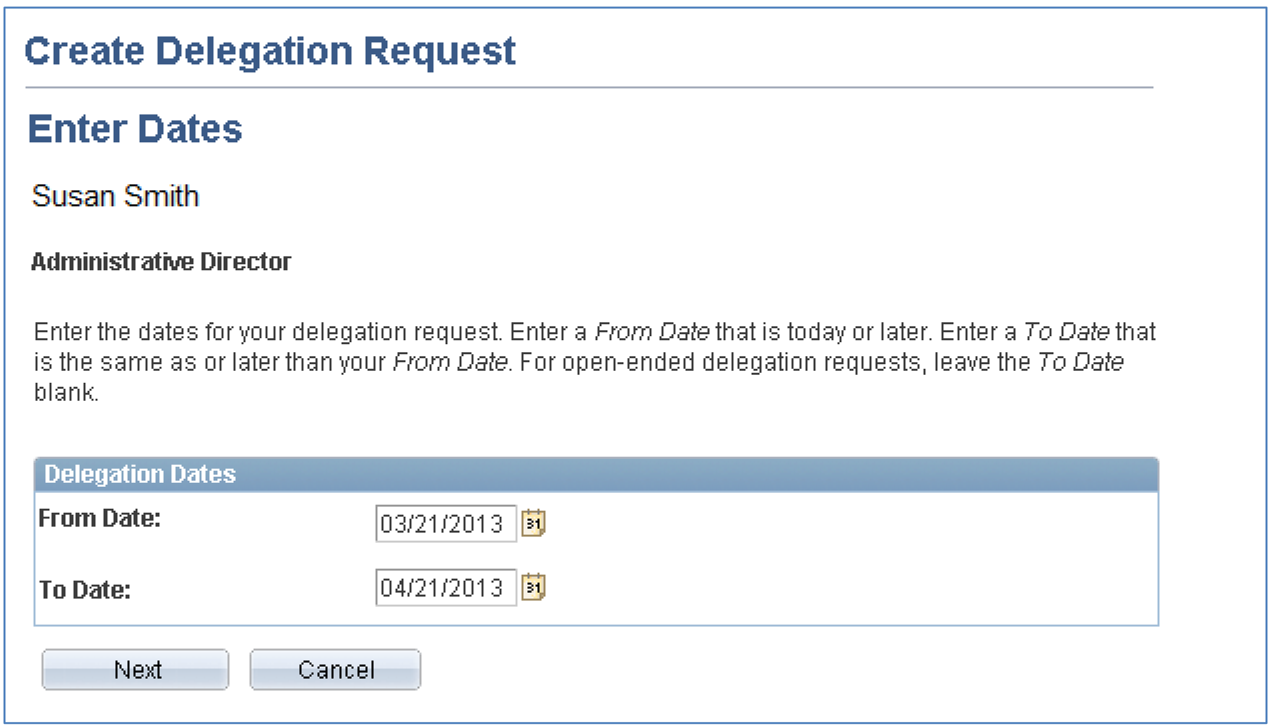
Submitting a Delegation Request

The new delegation framework requires the delegator to submit a delegation request and the delegate (or proxy) to accept or deny that request. The delegation will not become active until the request is accepted by the proxy.

To submit a delegation request, click on the Create Delegation Request link.

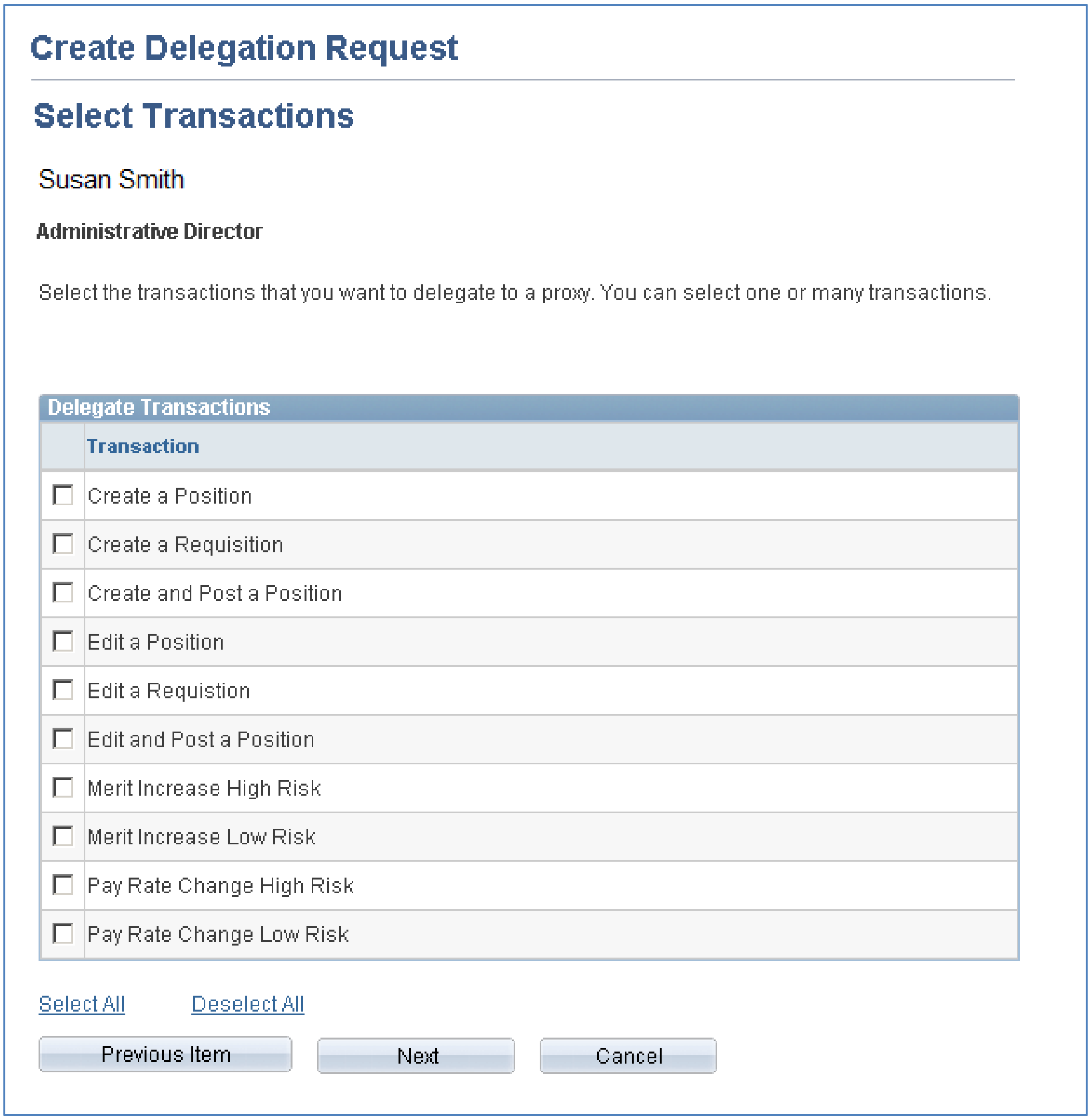


Step 1: Enter the begin and end dates for the delegation. Click Next.



Submitting a Delegation Request (continued)

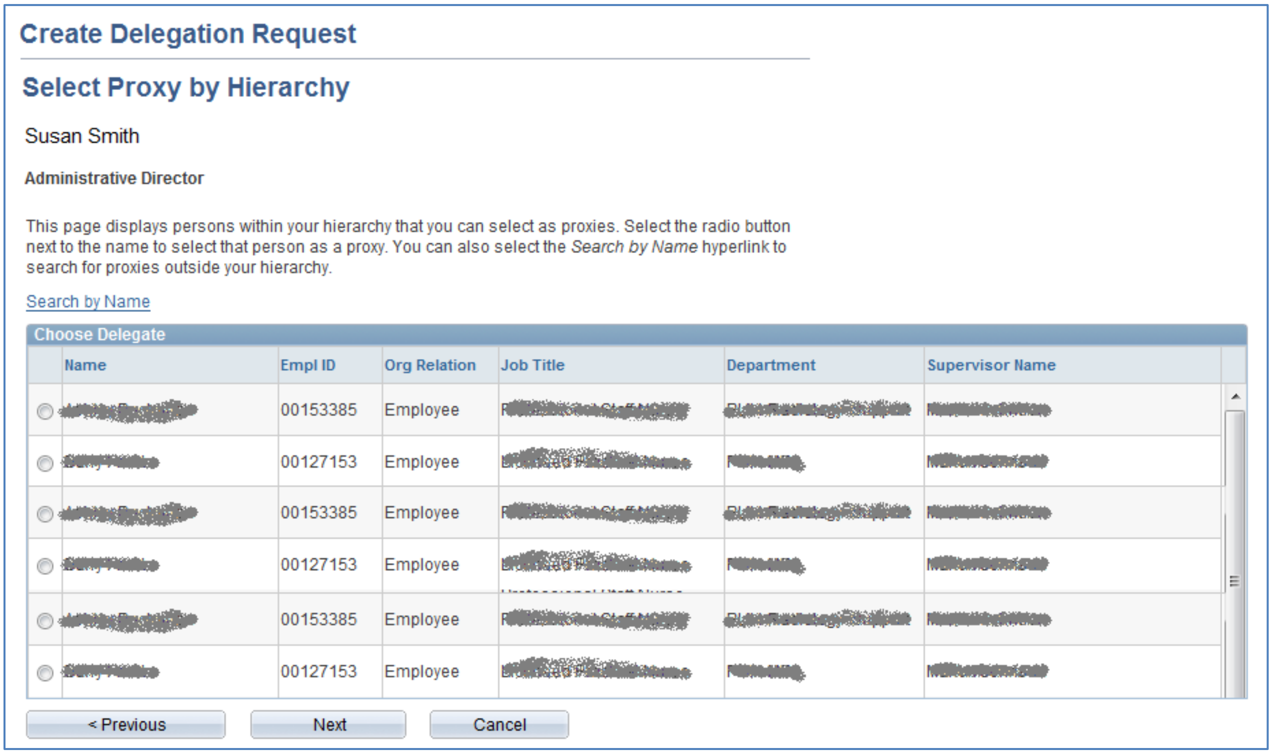
Step 2: Select which transactions to delegate. Click Next.



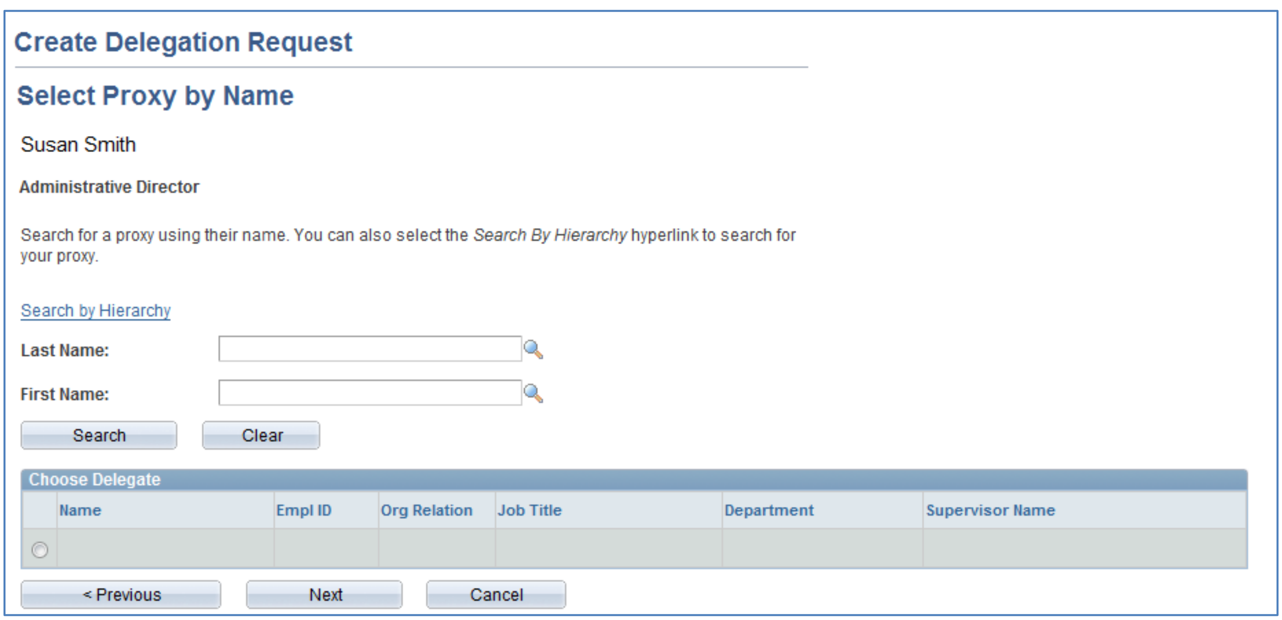
Note: Not all transactions need to be delegated or delegated to the same person.

Submitting a Delegation Request (continued)

Step 3: Select the proxy by clicking the button to the left of the person's name. Click Next.

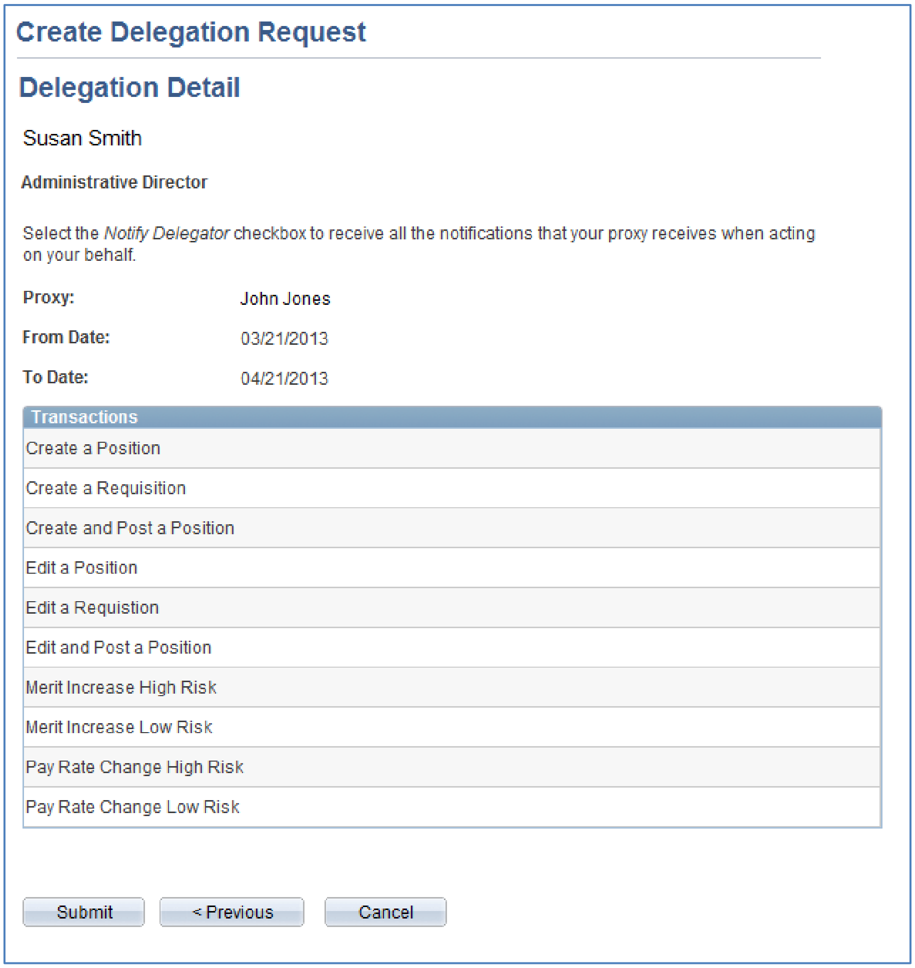


By default, a list of direct reports will be available for selection. However, click on the Search by Name link to request someone not in the list of direct reports.



Submitting a Delegation Request (continued)

Step 4: Confirm and click Submit.


Create Delegation Request

Delegation Detail

Susan Smith

Administrative Director

Select the *Notify Delegator* checkbox to receive all the notifications that your proxy receives when acting on your behalf.

Proxy: John Jones

From Date: 03/21/2013

To Date: 04/21/2013

Transactions
Create a Position
Create a Requisition
Create and Post a Position
Edit a Position
Edit a Requistion
Edit and Post a Position
Merit Increase High Risk
Merit Increase Low Risk
Pay Rate Change High Risk
Pay Rate Change Low Risk

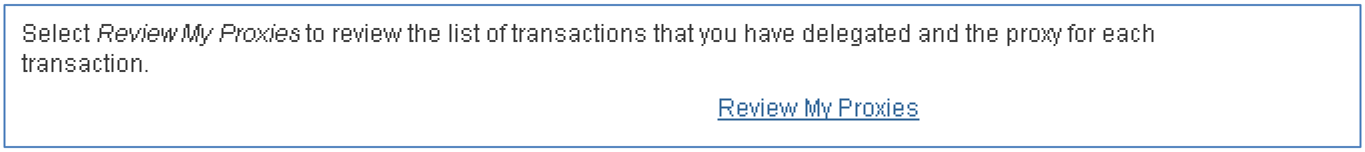
Submit < Previous Cancel

Important Notes on Submitting a Delegation Request:

- Once submitted, an email will be sent to the proxy with instructions on how to view and accept the request.
- Once the request is accepted, the delegator will receive an email notification. If the delegation period is immediately in effect, all pending transactions will be routed to the proxy. The proxy also will receive email notifications for each routed transaction. If the delegation period is not immediately effective, then the transactions will be routed in the morning of when the period comes into effect.
- For the duration of the delegation period, the delegator will not be able to see or approve pending transactions. Nor will they receive notification emails for any new transactions to approve. All pending requests and notification emails will go directly to the proxy. Once the delegation period ends or is revoked (terminated), all transactions will route back to the delegator and the delegator will receive email notifications for each routed transaction.

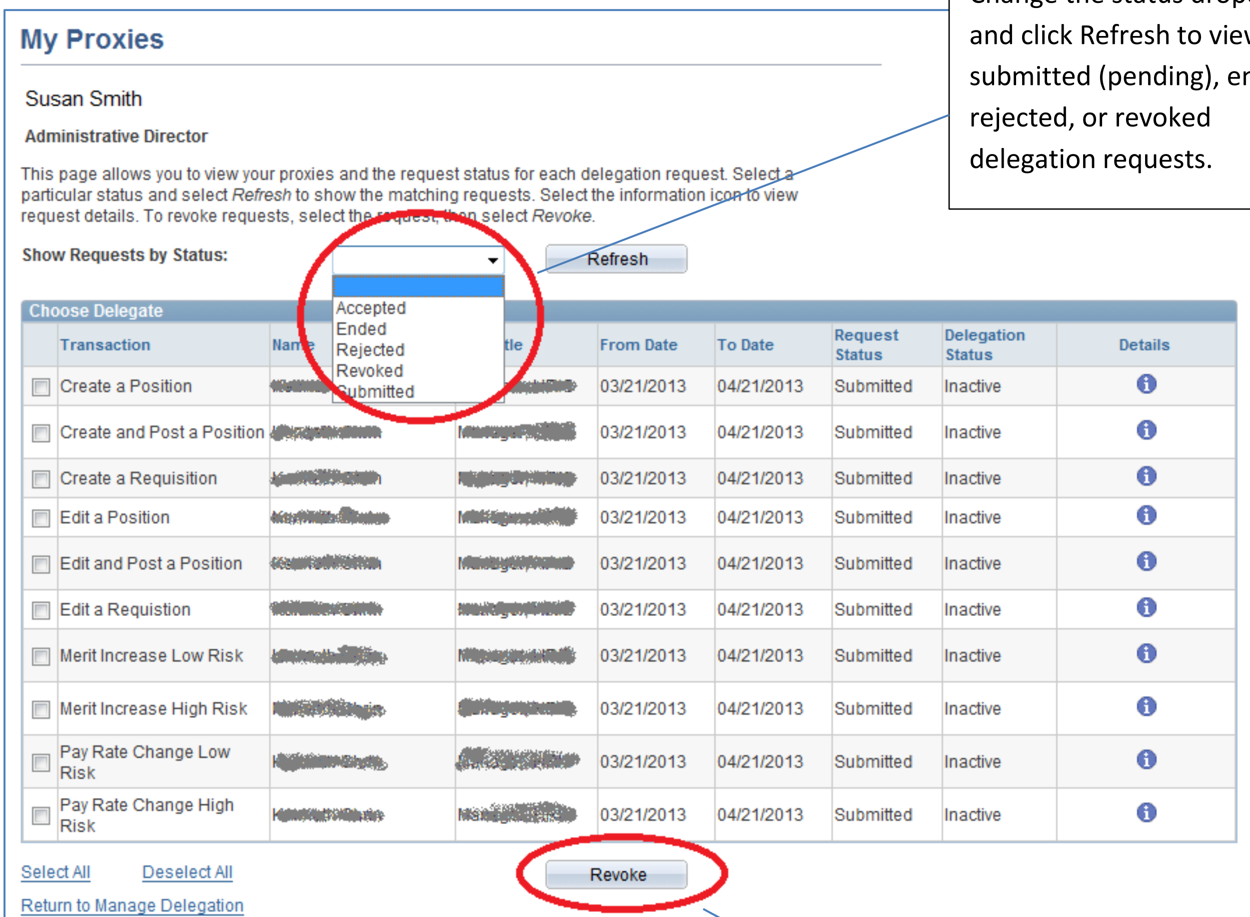
Reviewing Proxies

Click on the Review My Proxies link to view the details and status of delegation requests for which you are the delegator.



By default, the page will display all accepted proxies.

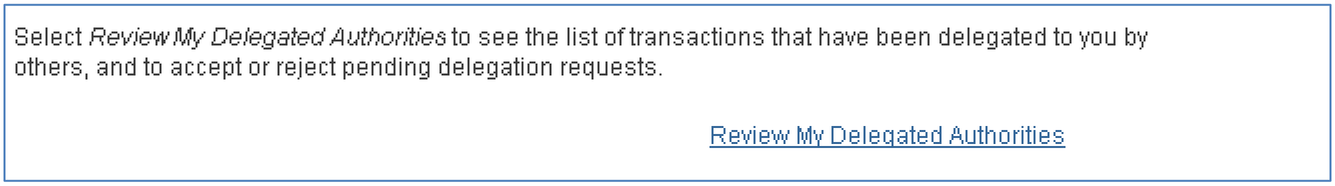
Change the status dropdown and click Refresh to view submitted (pending), ended, rejected, or revoked delegation requests.



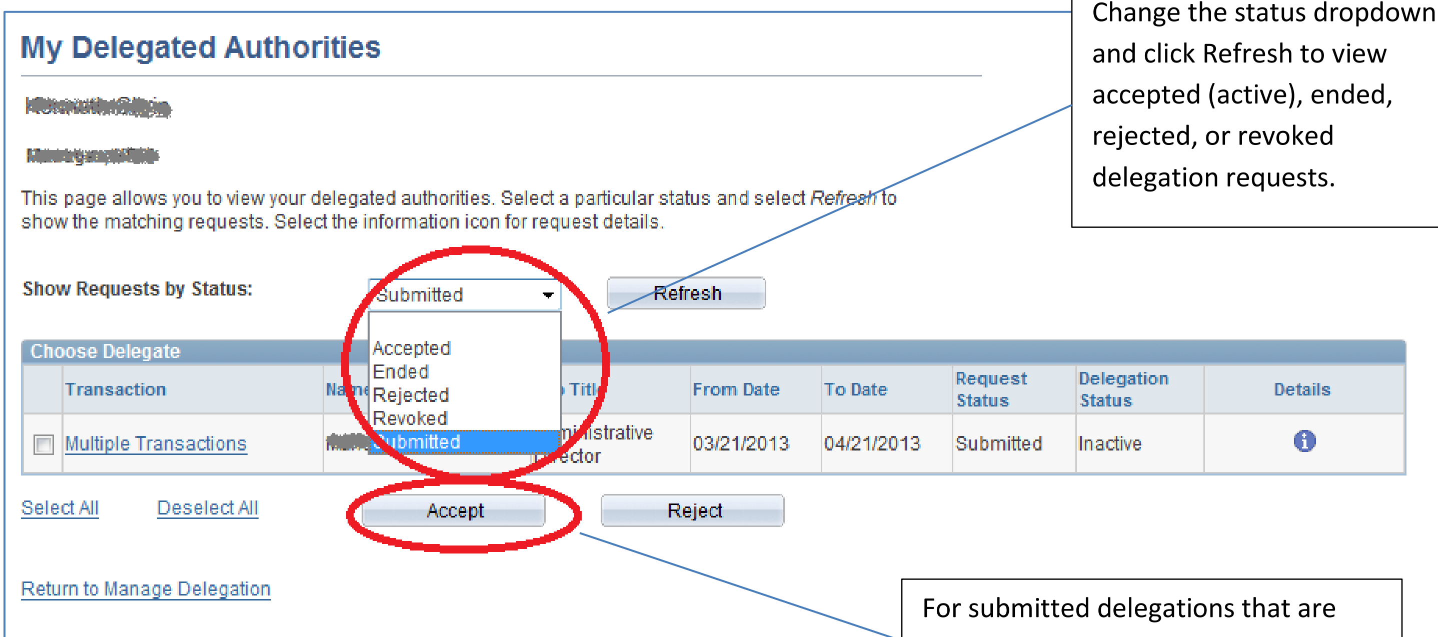
When necessary, for accepted or pending delegations, check the box to the left of each delegation and click Revoke at the bottom of the page to immediately terminate a delegation.

Reviewing and Accepting Delegation Authorities

Click on the Review My Delegated Authorities link to view the details and status of delegation requests for which you are the proxy.



By default, the page will display all submitted delegation requests.



Change the status dropdown and click Refresh to view accepted (active), ended, rejected, or revoked delegation requests.

For submitted delegations that are pending your acceptance, check the box to the left of the request and click either Accept or Reject at the bottom of the page.

Important Note on Accepting a Delegation Request:

- Once the request is accepted, the delegator will receive an email notification. If the delegation period is immediately in effect, all pending transactions will be routed to the proxy. The proxy also will receive email notifications for each routed transaction. If the delegation period is not immediately effective, then the transactions will be routed in the morning, once the period comes into effect.

I do not have access to the My Staff section and the Manager Homepage, am I still able to delegate?

Yes. Click on the View/Update Personal Information link under My Profile and click on Manage Delegation.

Am I able to delegate the ability to submit transactions to a proxy on my behalf?

Only the ability to approve HR transactions can be delegated.

I have set up a delegation and I can no longer view any of my pending transactions. Why?

For the duration of the delegation period, the delegator will not be able to see or approve pending transactions. Nor will they receive notification emails for any new transactions to approve. All pending requests and notification emails will go directly to the proxy. Once the delegation period ends or is revoked (terminated), all transactions will route back to the delegator and the delegator will receive email notifications for each routed transaction.

I submitted a delegation request, but the proxy is not able to accept it. Why?

If the request is not visible to the proxy, make sure the proxy has navigated to the Review My Delegated Authorities page and that the Show Request by Status dropdown is set to Submitted and click Refresh. If it is still not visible, the proxy should check the other dropdown options and click Refresh to see if the delegation has not already been approved, denied, or revoked.

I submitted a delegation request, but the proxy cannot view or approve any of my transactions. Why?

If the proxy is unable to see your delegated transactions, first navigate to Review My Proxies within the Manage Delegation page and confirm that the delegation status is accepted and active. If it is active, confirm that delegation for the correct transaction types was assigned. If it is accepted but inactive, review the delegation period to determine if the delegation has yet to begin or has ended. If it is not accepted, verify with the proxy to ensure that the delegation request has been accepted.

The system will not allow for me to submit a delegation request for the period I have selected. Why?

If you are not able to submit a delegation request for the period you have selected, then you may have already submitted a pending or accepted delegation or you may already be a proxy for someone else for that period.

To view submitted pending and accepted delegations, navigate to the Review My Proxies link within the Manage Delegation page. By default, accepted transactions will appear. To view pending requests, adjust the status dropdown to Submitted and refresh. If necessary, check the box to the left of each delegation and click Revoke at the bottom of the page to immediately terminate a delegation. You will then be able to submit a new delegation request for the period.

To view delegations for which you are the proxy, navigate to the Review My Delegated Authorities link within the Manage Delegation page. By default, submitted delegation requests will appear. To view accepted requests, adjust the status dropdown to Accepted and refresh.

Frequently Asked Questions (continued)

The system does not display all transaction types as options for me to delegate. Why?

If you do not see a transaction type to delegate, then you may either have already submitted a pending or accepted delegation or you may already be a proxy for someone else for the transaction type for the period that you have selected.

To view submitted pending and accepted delegations, navigate to the Review My Proxies link within the Manage Delegation page. By default, accepted transactions will appear. To view pending requests, adjust the status dropdown to Submitted and refresh. If necessary, check the box to the left of each delegation and click Revoke at the bottom of the page to immediately terminate a delegation. You will then be able to submit a new delegation request for the transaction type for the period.

To view delegations for which you are the proxy, navigate to the Review My Delegated Authorities link within the Manage Delegation page. By default, submitted delegation requests will appear. To view accepted requests, adjust the status dropdown to Accepted and refresh. You cannot delegate approval authority for a transaction for which you are the proxy for someone else.

Why can't I see the Review My Proxies or Review My Delegated Authority links?

The Review My Proxies link will only appear on the Manage Delegation homepage if you already have a submitted, accepted, revoked, or ended delegation request. To make a delegation request, first click on the Create Delegation Request and follow the steps for defining the delegation period, selecting the transactions to delegate, and selecting a proxy.

What happens when a delegation ends?

Both the delegator and proxy will receive an email notification indicating that the delegation period has ended and that the delegation is now inactive. Once the delegation period ends or is revoked (terminated), all pending transactions will route back to the delegator and the delegator will receive email notifications for each routed transaction.

I wish to cancel a submitted or accepted delegation. How do I do this?

The delegator may revoke any accepted or pending delegations. First, navigate to the Review My Proxies link within the Manage Delegation page. By default, accepted transactions will appear. To view pending requests, adjust the status dropdown to Submitted and refresh.

Check the box to the left of each delegation and click Revoke at the bottom of the page to immediately terminate a delegation.

How do I extend a delegation request?

To extend a delegation request, you first need to identify when the current delegation period will end. Then, click on the Create Delegation Request link. In the new delegation request From Date field, enter the day following the current delegation End Date. Continue through the steps of submitting the new delegation request. Once that request is accepted, the delegation period will be extended.

What happens if my proxy terminates or goes on leave?

The system will send a notification email to the delegator each morning if it identifies that a proxy will be inactivate (terminated or on leave) at any point within the delegation period. You then can revoke the delegation and resubmit a delegation request for the period that the proxy is active or submit a delegation request for a different proxy. Or, you can revoke the delegation once the proxy becomes inactive (however, you will continue to receive the email notifications until the delegation ends or is revoked).

To revoke a delegation, navigate to the Review My Proxies link within the Manage Delegation page. By default, accepted transactions will appear. To view pending requests, adjust the status dropdown to Submitted and refresh. Check the box to the left of each delegation and click Revoke at the bottom of the page to immediately terminate a delegation.

How do I change my proxy?

In order to change a proxy, you must first revoke the current delegation. Then you can submit a delegation request for a different proxy.

To revoke a delegation, navigate to the Review My Proxies link within the Manage Delegation page. By default, accepted transactions will appear. To view pending requests, adjust the status dropdown to Submitted and refresh. Check the box to the left of each delegation and click Revoke at the bottom of the page to immediately terminate a delegation.