

Delegation: My Delegations: Delegate Tasks

Manager

PURPOSE

The purpose of this job aid is to assist staff with delegating business processes. Delegations are for **temporary assignment and are not to be used on a long term or permanent basis.**

Example: A manager can delegate all business processes to a peer or supervisor, when they know they will be out of the office for an extended period.

A *Peer*, according to Payroll Policy:

- Is defined as any employee whose position is on the same level within the supervisory org hierarchy as the current employee needing a delegate.
- Would not be defined as an employee who reports directly to the employee requesting a delegate.

A *Supervisor*, as defined by Payroll Policy,

- Is defined as an employee that directly supervises the employee requesting a delegate or any other supervising employee that is within the same supervisory org.

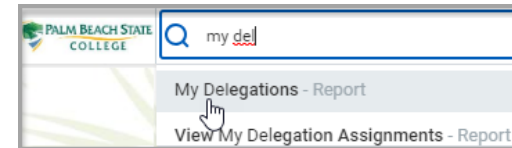
Delegation does not remove responsibility (ownership) for the task from the delegator to whom it was initially assigned and, when the delegation period ends, any incomplete delegated tasks revert to the original owner.

Note: If a delegated task is sent back to the delagatee to modify, the delegator may or may not see the task in his/her inbox. To check status, delegator can click on the **Archive** tab and view status of the task.

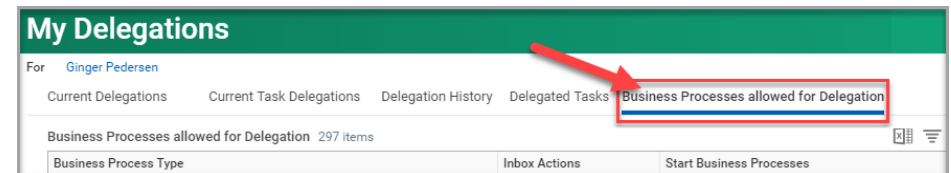
View Business Processes allowed for Delegation

To find a list of business processes that are allowed for delegation, follow the steps below.

1. Type **My Delegations** in the search field and select **My Delegations – Report**

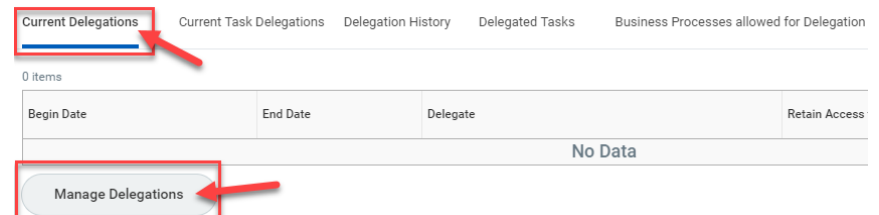


2. Select **Business Processes allowed for Delegation** tab.



Current Delegations

1. Type **My Delegations** in the search field and select **My Delegations – Report**
2. Select **Current Delegations** tab.
3. Click **Manage Delegations** button.



4. Enter **Begin Date** and **End Date**.
5. Type the person's name you want to delegate tasks to in the Delegate field and press enter.

Note: You can only delegate to peers or superiors. See the Purpose section of this Job Aid for an explanation.

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6. **Start on My Behalf** – choose the business processes you want your delegate to be able to *initiate* on your behalf.
7. **Do Inbox Tasks On My Behalf** – your delegate will have access to your Inbox items. Choose if you want them to see the inbox tasks...
 - a. **For all Business Processes** (everything)
 - b. **For Business Process** (choose the few you want them to work in your inbox).
 - c. **None of the above** – the delegate cannot work any items in your inbox, but they will be able to start processes, if you added the processes to the “start on my behalf” section.

Note: Always click the Retain Access to Delegated Tasks in Inbox

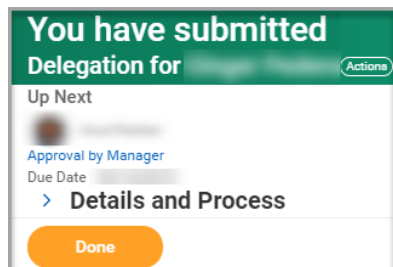
> Business Processes allowed for Delegation

New Delegation 1 item

*Begin Date	End Date	*Delegate	Start On My Behalf	Do Inbox Tasks On My Behalf
MM / DD / YYYY	MM / DD / YYYY	search		<input type="radio"/> For all Business Processes <input type="radio"/> For Business Process <input checked="" type="radio"/> None of the above <input type="checkbox"/> Retain Access to Delegated Tasks in Inbox Delegation Rule

Submit Save for Later Cancel

8. Click **Submit** at the bottom of the page.
9. This goes to the manager for approval. Click **Done**.

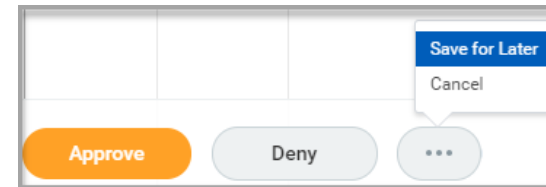


Manager Approval

1. As the manager, click the **Inbox Worklet** or the **Inbox icon** at the top of your home page.



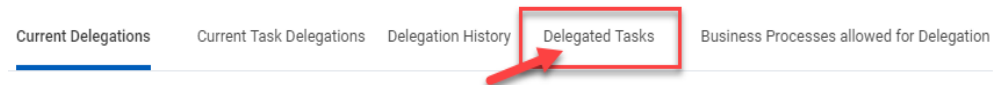
2. Review the Delegation request. Choose one of these options:
 - a. **Approve**
 - b. **Deny**
 - c. More > **Save for Later**
 - d. More > **Cancel**



Delegated Tasks

Later, to see what tasks the delegate has completed, go to the Delegated Tasks tab.

1. Type **My Delegations** in the search field and select **My Delegations – Report**
2. Select **Delegated Tasks** tab.

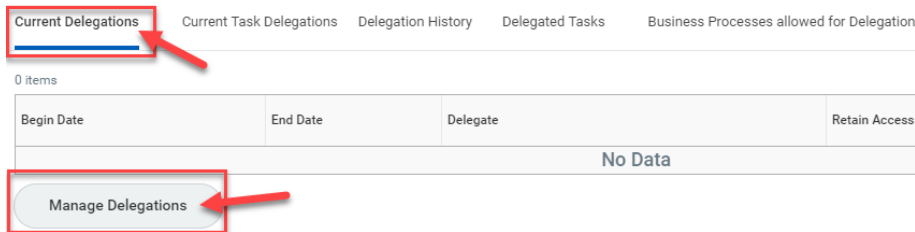



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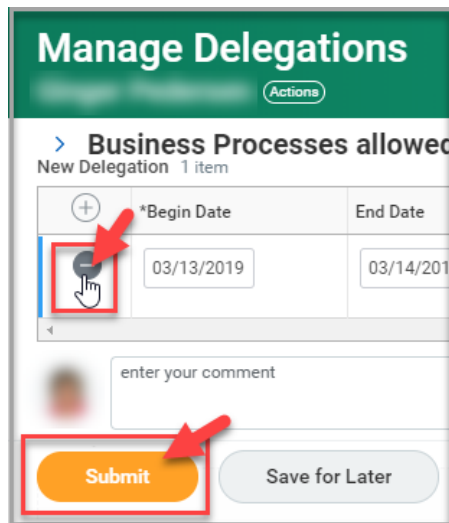
Stop Current Delegations

You can end a delegation before the elapse of the End Date selected during its creation.

1. Type **My Delegations** in the search field and select **My Delegations – Report**
2. Select **Current Delegations** tab.
3. Click **Manage Delegations** button.



4. Click the  icon to remove the row.
5. Click **Submit** at the bottom of the page.



REVISION DATE	DESCRIPTION OF CHANGE	AUTHOR
10/9/17	Initial release	Cindy Franklin
10/10/17	ERP Team Approved	ERP Team
6/4/18	Added definition of "Peer" in Purpose section	CF, requested by Kelly Ingram
1/4/19	Added images & clarify intended purpose of delegations.	Dominique Norbeck
3/13/19	Removal of direct Inbox Task Delegation section. Addition of more images. Update processes.	Dominique Norbeck