
UNIVERSITY OF ALBERTA

PeopleSoft HCM

Changing an Existing Delegation



Prepared by: HR Operations

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Training Guide

Changing an Existing Delegation



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Changing an Existing Delegation

In the event that you return from leave early or the existing delegate has rejected your delegation request, you will be required to change your approval delegation request. In this topic, you will learn how to change an existing delegation request.

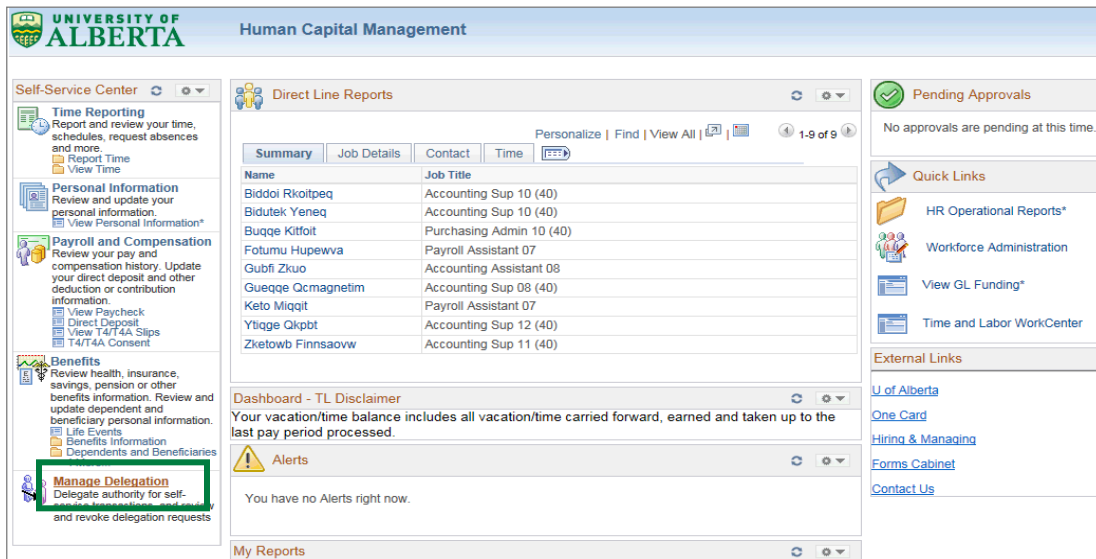
Procedure

Navigation Path: [Main Menu](#) > [Self Service](#) > [Manage Delegation](#)

Before Changing and Existing Delegation:

Ensure that the proxy you had assigned has cleared or approved all time and labour related hours that may be in their queue.

1. On your Home Page within the **Self-Service Center** pagelet, Click the **Manage Delegation** link.



The screenshot shows the 'Human Capital Management' interface. On the left, the 'Self-Service Center' sidebar contains several menu items: Time Reporting, Personal Information, Payroll and Compensation, Benefits, and **Manage Delegation** (highlighted with a green box). The main content area displays 'Direct Line Reports' with a table of employees and their job titles. On the right, there are sections for 'Pending Approvals', 'Quick Links', and 'External Links'.

Summary	Job Details	Contact	Time
Name	Job Title		
Biddoi Rkoitpeq	Accounting Sup 10 (40)		
Bidutek Yeneq	Accounting Sup 10 (40)		
Buqqe Kitfoit	Purchasing Admin 10 (40)		
Fotumu Hupewva	Payroll Assistant 07		
Gubfi Zkuo	Accounting Assistant 08		
Gueqqe Qcmagnetim	Accounting Sup 08 (40)		
Keto Miqqit	Payroll Assistant 07		
Ytiqqe Qkpbtt	Accounting Sup 12 (40)		
Zketowb Finnsoavw	Accounting Sup 11 (40)		

- The **Manage Delegation** page provides you the ability to 'Revoke' or 'Change' an existing approval delegation.

Manage Delegation

Dtjyutb Pbeq

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](#)

- Click the **Review My Proxies** link.
- Find the line with the person you want to change.

Select the box before the **Transaction** item

My Proxies

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APO Admin Manager 0479

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*.

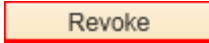
Show Requests by Status [Refresh](#)

Choose Delegate								
	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
<input type="checkbox"/>	T&L Approve Payable Time	Geqiw Tivvinoav	Associate Professor	05/12/2016	05/15/2016	Revoked	Inactive	i
<input checked="" type="checkbox"/>	T&L Approve Payable Time	Hop Kovhingw	Professor 3	05/13/2016	05/18/2016	Submitted	Inactive	i

Select All Deselect All [Revoke](#)

[Return to Manage Delegation](#)

5. Ensure the intended line is highlighted and Click the **Revoke** button.



6. The **Revoke Delegation Request** page provides an opportunity to cancel the request, just in case you clicked the Revoke button accidentally.

Revoke Delegation Request

Dtjijtb Pbeq

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Are you sure you want to revoke the delegation requests that you have selected ?

7. Click the **Yes - Continue** button.
8. A message will appear indicating if you have successfully revoked the delegation or not.

Revoke Delegation Request

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APO Admin Manager 0479

You have successfully revoked a delegation request. Refer to the My Proxies page to view revoked delegation requests.

9. Click the **OK** button.

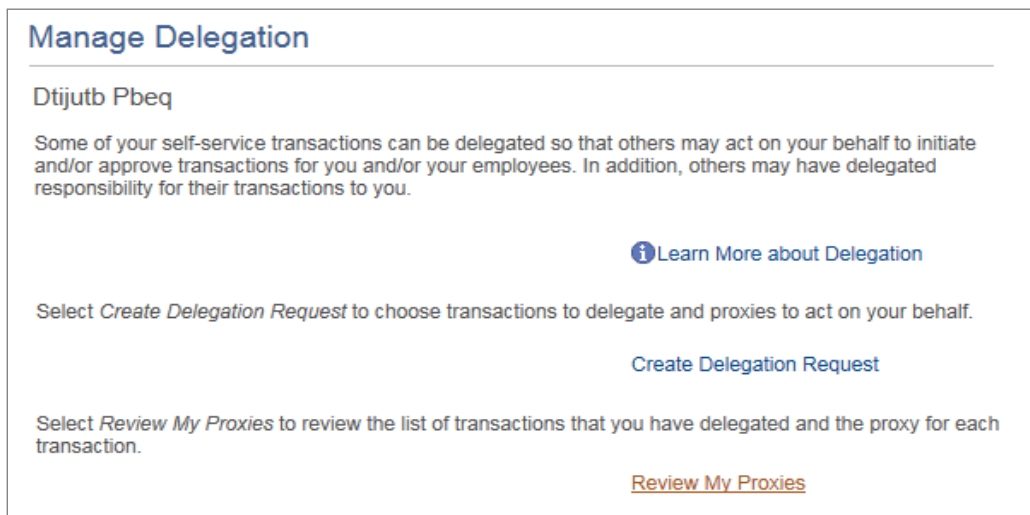
Note: Once **OK** has been clicked, the system will send an e-mail notification to the delegate stating their delegation has been revoked.

The delegation will stop immediately. No action is required by the delegate to 'accept' the revoke action.

Any Pending Payable time your Delegate did not approve will now be yours to approve.

10. You will be returned to the **Manage Delegation** page.

To ensure the status has changed, Click the **Review My Proxies** link.



Manage Delegation

Dtjytb Pbeq

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[Learn More about Delegation](#)

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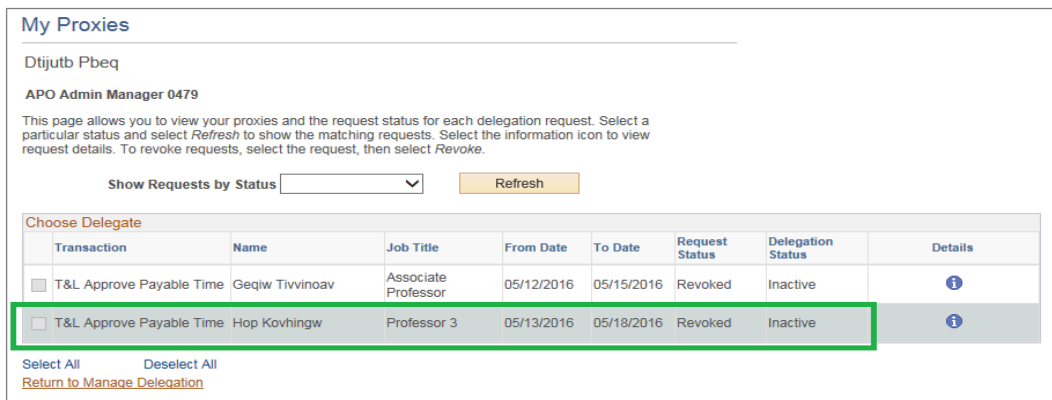
[Create Delegation Request](#)

Select *Review My Proxies* to review the list of transactions that you have delegated and the proxy for each transaction.

[Review My Proxies](#)

11. The **My Proxies** page will show your selection as being Revoked and Inactive.

Click the **Return to Manage Delegation** link.



My Proxies

Dtjytb Pbeq

APO Admin Manager 0479

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 type="checkbox"/> T&L Approve Payable Time	Geqiw Tivvinoav	Associate Professor	05/12/2016	05/15/2016	Revoked	Inactive	i	
<input type="checkbox"/> T&L Approve Payable Time	Hop Kovhingw	Professor 3	05/13/2016	05/18/2016	Revoked	Inactive	i	

[Select All](#) [Deselect All](#)
[Return to Manage Delegation](#)

12. To **Change** an existing delegation:
 - First *Revoke* the existing delegation
 - Then *Create* a new delegation request
13. Congratulations! You have completed the training on how to Change an Existing Delegation.

For reference materials and more tutorials please see the links provided below.

End of Procedure.



For **Employees**, all PeopleSoft HCM Learning Reference Materials are available within the Faculty & Staff website under the applicable sections of the Employee Self Service web page (<https://www.ualberta.ca/faculty-and-staff/my-employment/employee-self-service>).



For **HR Professionals**, all PeopleSoft HCM Learning Reference Materials are available within the Human Resource Services website under the PeopleSoft Training web page (<https://www.ualberta.ca/human-resource-services/managing-administration/peoplesoft-training>).



Refer to the Online Learning web page (<https://www.ualberta.ca/human-resource-services/managing-administration/peoplesoft-training/online-learning>) within the Human Resource Services website for all Online Tutorials and videos.