
UNIVERSITY OF ALBERTA

PeopleSoft HCM

Creating a New Delegation



Prepared by: HR Operations

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Creating a New Delegation

In situations where an Approver is away on leave, the Approver can delegate their approval authority to someone else. In this topic, you will learn how to delegate your approval authority in PeopleSoft HCM.

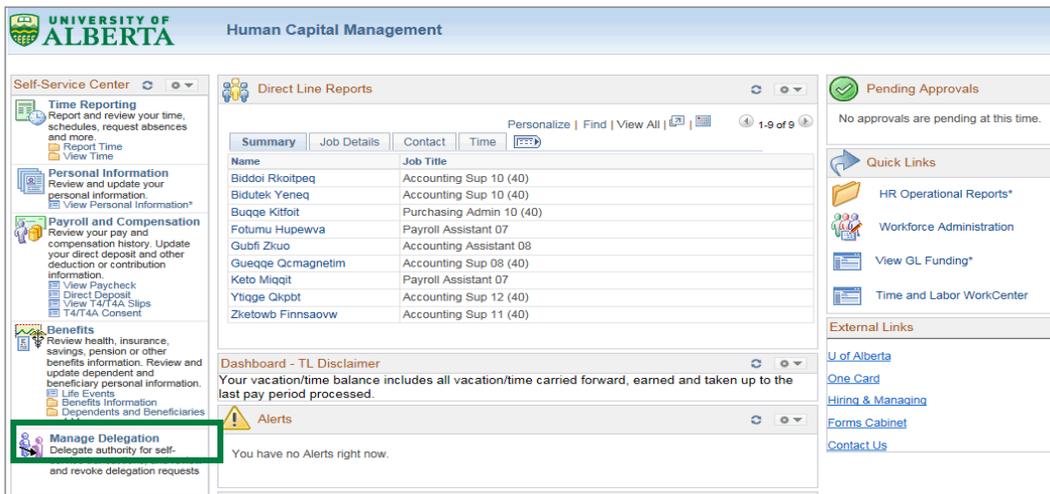
Procedure

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

1. Before beginning the Delegation Process:

- Clear your queue of all Pending Payable time before you submit your delegation request.
- Speak to your potential delegate first to check for availability.
- Review your Proxies to ensure you only have one active proxy at a time.
- Ensure your Proxy has reviewed all Payable Time Approval training material.

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



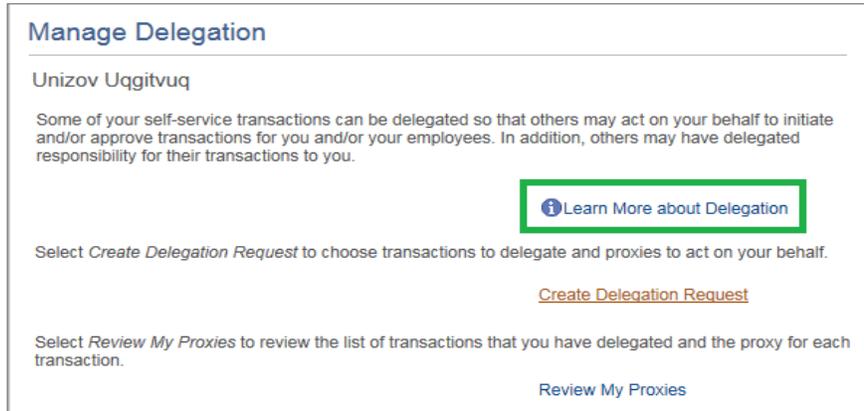
The screenshot displays the 'Self-Service Center' interface for the University of Alberta. The left sidebar contains several menu items, with 'Manage Delegation' highlighted in a green box. The main content area shows a 'Direct Line Reports' table with columns for Name and Job Title. The table lists several employees and their roles, such as 'Biddoi Rkoitpeq' as 'Accounting Sup 10 (40)'. Below the table, there are sections for 'Dashboard - TL Disclaimer' and 'Alerts'.

Name	Job Title
Biddoi Rkoitpeq	Accounting Sup 10 (40)
Bidutek Yeneq	Accounting Sup 10 (40)
Buqqe Kitfoit	Purchasing Admin 10 (40)
Fotumu Hupewwa	Payroll Assistant 07
Gubfi Zkuo	Accounting Assistant 08
Gueqqe Qcmagnetim	Accounting Sup 08 (40)
Keto Miqqit	Payroll Assistant 07
Ytiqqe Qkpbst	Accounting Sup 12 (40)
Zketowb Finnsaovw	Accounting Sup 11 (40)

3. The **Manage Delegation** page provides a few options related to delegation.

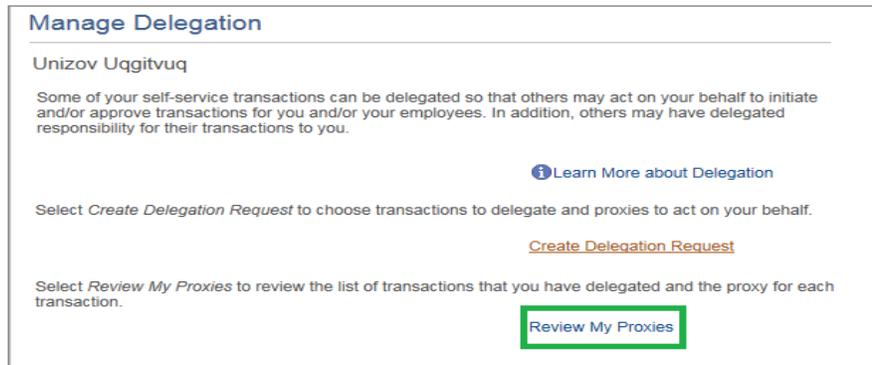
The **Learn More about Delegation** link provides an introduction to Managing your Delegation.

All new users of the system are encouraged to click on this link before continuing.

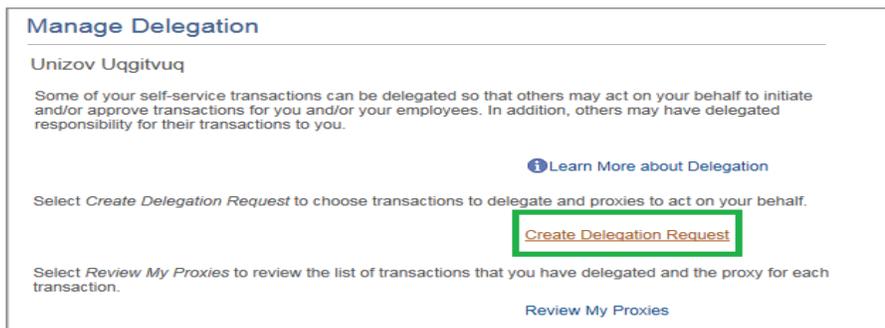


4. The **Review My Proxies** link will only appear after a delegation has been submitted.

More details can be found within the 'Changing an Existing Delegation' topic.



5. To start the approval delegation process, Click the **Create Delegation Request** link.



6. The **From Date** will automatically default to the current date.

To change the date, click the **Calendar** graphic.

Create Delegation Request

Enter Dates

Unizov Uqgitvuq

Student Prgm Coord 10 (40)

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 

To Date 

Note: A delegation cannot begin prior to the current date.

7. Click on the day you want the delegation to begin.

In this example, click **May 18, 2016**.

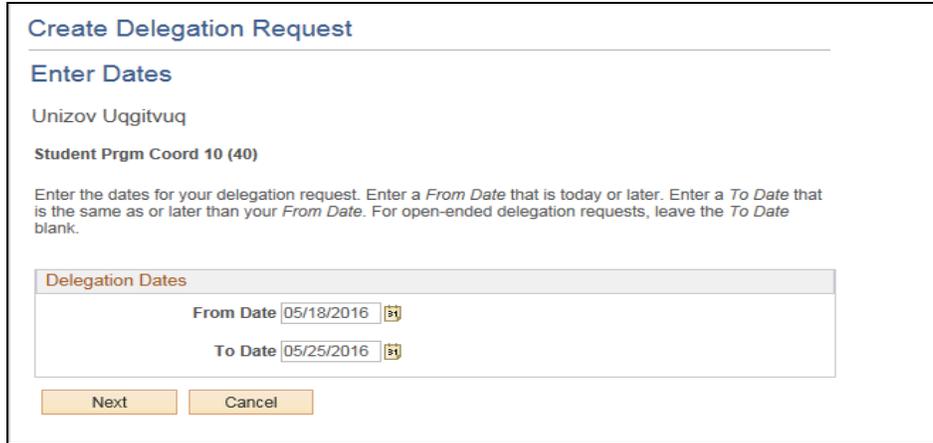
Calendar x

May 2016

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

⏪ Current Date ⏩

Note: The dates selected are for the days you will be absent. All transactions submitted during these dates will be routed to the delegate for approval.



Create Delegation Request

Enter Dates

Unizov Uqgitvuq
Student Prgm Coord 10 (40)

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	05/18/2016
To Date	05/25/2016

Next Cancel

8. In this example, the **To Date** field has been populated for you.

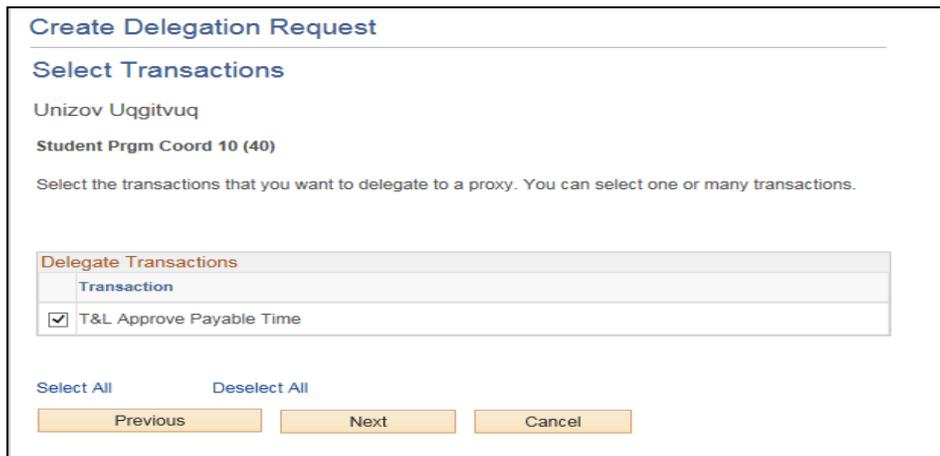
Once your calendar dates are selected, Click the **Next** button.

9. The next step is to select the type of transactions you want to delegate approval authority for.

Note: Assigning a delegate is all or nothing. You cannot delegate approval for specific employees. You are delegating the entire task of labor approval for all of your direct reports.

However, if there are multiple transaction type options listed, you can assign a different delegate to each transaction type line.

10. Within the Delegate Transactions section, Click the **T&L Approve Payable Time** option.



Create Delegation Request

Select Transactions

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Student Prgm Coord 10 (40)

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

Delegate Transactions	
Transaction	
<input checked="" type="checkbox"/>	T&L Approve Payable Time

Select All Deselect All

Previous Next Cancel

11. Click the **Next** button.

12. Now you need to select a Proxy (a person to delegate your approval authority to).

The **Select Proxy by Hierarchy** page provides a list of all employees you can delegate to. This list includes all employees linked to you based on the 'Reports To' structure within PeopleSoft HCM.

The system does not restrict 'who' you can delegate to.

Warning: You can delegate to anyone within the list. This includes those that are not employees or do not normally have approval authority.

13. If the person you want to choose as a delegate is not in the initial list, use the **Search by Name** link provided.

Create Delegation Request

Select Proxy by Hierarchy

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Student Prgm Coord 10 (40)

This page displays persons within your hierarchy that you can select as proxies. Select the radio button next to the name to select that person as a proxy. You can also select the *Search by Name* hyperlink to search for proxies outside your hierarchy.

[Search by Name](#)

Choose Delegate						
Name	Empl ID	Organizational Relationship	Job Title	Department	Supervisor Name	
<input type="radio"/> Gebne Ytiyit	1137226	Employee	Admissions Coordinator 08	AUG Acad Prog&Camp Reg Office	Unizov Uqgitvuq	<input type="checkbox"/>
<input type="radio"/> Rbine Qeygriq	1149304	Employee	Admin Assistant 08	AUG Acad Prog&Camp Reg Office	Unizov Uqgitvuq	<input type="checkbox"/>
<input type="radio"/> Qetek Rtijuqqoqj	0292999	Employee	Admin Assistant 08	AUG Acad Prog&Camp Reg Office	Unizov Uqgitvuq	<input type="checkbox"/>
<input type="radio"/> Qkete Fetmi	1223023	Employee	Admin Assistant 07	AUG Learning and Beyond	Unizov Uqgitvuq	<input type="checkbox"/>
<input type="radio"/> Qwefib Piprin	1221141	Employee	Admin Assistant 07	AUG Acad Prog&Camp Reg Office	Unizov Uqgitvuq	<input type="checkbox"/>

14. Once you have found the appropriate person, select the box before the **Name** item.

15. Ensure the name you want is highlighted.

Click the **Next** button.

16. The **Delegation Detail** page summarizes your selections and provides an opportunity to ensure you have created the delegation as you intended.

Create Delegation Request

Delegation Detail

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Proxy Gebne Ytiyit

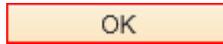
From Date 05/18/2016
To Date 05/25/2016

Transactions

T&L Approve Payable Time

17. Once you have confirmed the detail is correct, click the **Submit** button.
18. The last page indicates if your submission was successful or not.

Click the **OK** button.



19. **What happens after the delegation request is submitted?**
 - An e-mail is sent to the person you delegated approval to.
 - The e-mail recipient will open the link provided within the e-mail and either accept or reject the delegation request.
 - A response e-mail is sent to the requestor and the status under delegation proxy is updated.
20. Congratulations! You have completed the training on how to Create a New 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.