



## Job Aid: Delegation

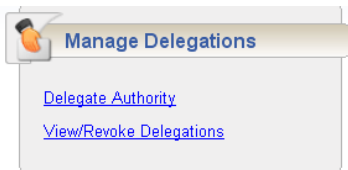
Delegation is the act of granting another member of the organization authority over a group of employees (an assignment group) when the typically assigned person is not available. A manager going on vacation for a week can delegate authority over his or her employees to another manager to ensure timesheets are reviewed and approved during his or her absence.

A user can delegate an assignment group and grant the delegation recipient his or her role or, in some cases, a lower role to define the delegation recipient's access to the group. When delegating, the owner can delegate only those roles that are at or below the owner's role for the group; i.e., someone with manager role for a group cannot delegate the administrator role to others.

Your system has several roles defined. Roles that may be delegated and the roles which each can delegate are defined as follows:

Role	Roles which can be delegated
Timekeeper	None, must be delegated by Bureau of Technology (BOT)
Manager	Managers
HR Administrator	None, must be delegated by BOT
Payroll Administrator	None, must be delegated by BOT
Payroll Certifier	Payroll Certifier
ACT Case Manager	ACT Case Manager

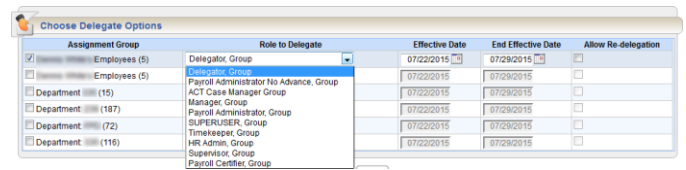
1. Log in as one of the roles that can delegate from the table above.
2. To delegate roles, select **Settings → Manage Delegations** from the dashboard. The **Manage Delegations** window appears.



3. Click **Delegate Authority**. The **Enter Search Criteria** window appears which lets you search for one or more assignment groups.



4. Enter your search criteria. You can enter a character string and/or the wildcard character (\*) to retrieve a list of groups matching the characters you enter.
5. Click **Search**. A window lists the assignment groups matching your search, along with the roles you are granted for each group.



6. For each assignment group being delegated, choose your delegation options:
  - In the **Assignment Group** column, select the checkbox next to the assignment group name.
  - In the **Role to Delegate** column, use the drop-down menu to select the roles to be delegated for the assignment group.
  - In the **Effective Date** and **End Effective Date** columns, enter the dates during which the assignment group roles will be delegated.
    - **Effective Date** defaults to current day.
    - **End Effective Date** defaults to one week from current day. To make a delegation permanent, enter an **End Effective Date** of 12/31/3000.
    - If you are delegating several groups and entering several dates, you can omit the



slashes. The system will insert them for you as you exit the date fields.

- In the **Allow Re-delegation** column, place a checkmark in the checkbox to allow the delegation recipient to delegate the assignment group to another user.

*Note: Some roles do not allow re-delegation and must be re-delegated by the Bureau of Technology.*

**IMPORTANT!** Re-delegation lets the delegate share authority over the assignment group with another user. When that occurs, the system will not automatically notify you and employee information could be inadvertently shared with others who should not see it. Best practice is to not check the **Allow Re-delegation** checkbox.

7. Click **Next** to display a search window for selecting the user who will be delegated that assignment group.
8. In the search window, enter your search criteria. You can also use a character string, the wildcard character (\*), or a combination to retrieve a list of users matching the characters you enter. If you are including a wildcard, use the **Max Results** field to limit the number of displayed records.

**Search for Delegation Recipients**

User ID:

First Name:

Last Name:

Max Results:

You may use \* as a wildcard. For instance, ab\* would match abc or abbey.

9. Click **Search**. A window appears with the results of the search.

**Search Results**

Name	Last Name
<input type="radio"/> Fernandez, Ty	Fernandez
<input type="radio"/> Fields, Vince	Fields
<input type="radio"/> Francis, John	Francis

10. Select a delegate.
11. Click **Select**. A confirmation message appears that indicates a successful delegation.

**Status Message**

Role(s) successfully delegated to user [Name], [Role] in Role ACT Case Manager Group on assignment group Department 335 (15)

If any delegations fail, a status message appears listing the unsuccessful delegations and why they failed. For example, a delegation could fail because the assignment group is already delegated to the selected delegate.

12. Click **Continue** to return to the **Manage Delegations** window.



## Cancelling or Revoking a Delegated Role

Once an owner has delegated a role, that owner can also cancel the delegation.

1. Select **Settings** → **Manage Delegations** in the Dashboard.
2. In the **Manage Delegations** dialog box, click **View/Revoke Delegations**.  
The **Enter Search Criteria** window appears.

**Enter Search Criteria**

**Group Description:**

**First Name:**

**Last Name:**

**User ID:**

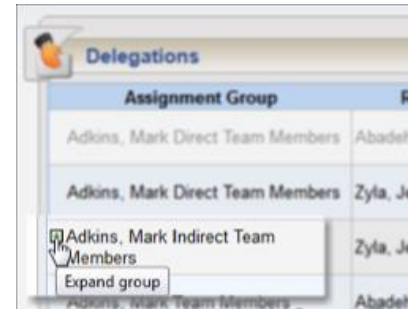
**As Of Date:**

You may use \* as a wildcard. For instance, ab\* would match abc or abbey.

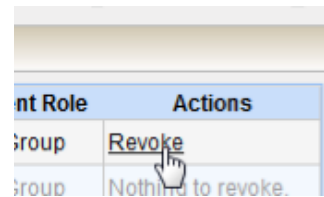
3. Enter your search criteria.  
A window appears that lists the roles currently delegated within your assignment groups, along with your role for each group.

Assignment Group	Recipient	Effective Date	End Effective Date	Delegated Role	Role After Delegation	My Current Role	Actions
Adkins, Mark Direct Team Members	Abadeh, Al A.	09/13/2012	09/12/2012	Server Administrator (Group Role)	Delegator (Group Role)	Delegator (Group Role)	Nothing to revoke.
Adkins, Mark Direct Team Members	Abakpoto, Maria	09/14/2012	09/21/2012	Delegator (Group Role)	Delegator (Group Role)	Delegator (Group Role)	Revoke
Adkins, Mark Direct Team Members	Zyla, Jeffrey Michael	09/13/2012	09/20/2012	Delegator (Group Role)	Delegator (Group Role)	Delegator (Group Role)	Revoke
Adkins, Mark Indirect Team Members	Zyla, Jeffrey Michael	09/13/2012	09/20/2012	Delegator (Group Role)	Delegator (Group Role)	Delegator (Group Role)	Revoke All
Adkins, Mark Team Members	Abadeh, Al A.	09/13/2012	09/20/2012	HR Rep (Group Role)	Delegator (Group Role)	Delegator (Group Role)	Revoke
Adkins, Mark Team Members	Abelle, Scott Nicholas	09/13/2012	09/20/2012	Team Leader (Group Role)	Delegator (Group Role)	Delegator (Group Role)	Revoke
Adkins, Mark Team Members	Adams, Came Ann	09/14/2012	09/21/2012	Timekeeper (Group Role)	Delegator (Group Role)	Delegator (Group Role)	Revoke
Adkins, Mark Team Members	Johnson, AJ Patrick	09/14/2012	09/21/2012	HR Rep (Group Role)	Delegator (Group Role)	Delegator (Group Role)	Revoke
Adkins, Mark Team Members	Saab, Ali N	09/13/2012	09/20/2012	Team Leader (Group Role)	Delegator (Group Role)	Delegator (Group Role)	Revoke
Adkins, Mark Team Members	Zyla, Jeffrey Michael	09/13/2012	09/20/2012	Team Leader (Group Role)	Delegator (Group Role)	Delegator (Group Role)	Revoke

4. If an assignment group contains more than one delegated role, click the **Expand Group** button displayed next to the **Assignment Group** name to see all of the delegated roles.



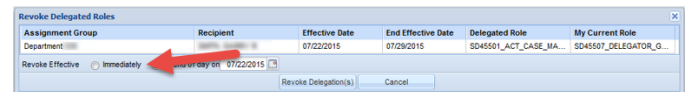
5. In the **Actions** column, select the delegation to be cancelled.
  - Selecting **Revoke** cancels only the delegation appearing in a single row.



- Selecting **Revoke All** (if shown) cancels all delegations for that assignment group.



A new window appears listing the delegation to be cancelled.



6. Choose the date on which the revocation is to be in effect or select the **Immediately** radio button.
7. Click **Revoke Delegations** to proceed with the cancellation.  
A message appears verifying the cancelled delegation.
8. Click **Back** to return to the **Delegations** window.