

Delegate Approvals

Delegate Approvals



Lesson Scenario

In this lesson, you will learn to delegate approvals.

Approvers can delegate the approval of time, overtime requests, and absence approval requests to a proxy.

The delegation must be done in advance of the days you need the proxy to act on your behalf. Delegations are not meant to circumvent the hierarchy in your organization.

Note: Please review the delegation scenario guide posted at:
<https://ags.hawaii.gov/hip/files/2020/09/Delegation-Guide.pdf>

Also review the SOPP for delegation information at:
<https://ags.hawaii.gov/hip/files/2020/10/Time-and-Leave-Standard-Operating-Policies-and-Procedures.pdf>

Select **'Next'** to continue.



Lesson Scenario

In this lesson, you will learn to delegate approvals:

Approvers can delegate the approval of time, overtime requests, and approval requests to a proxy.

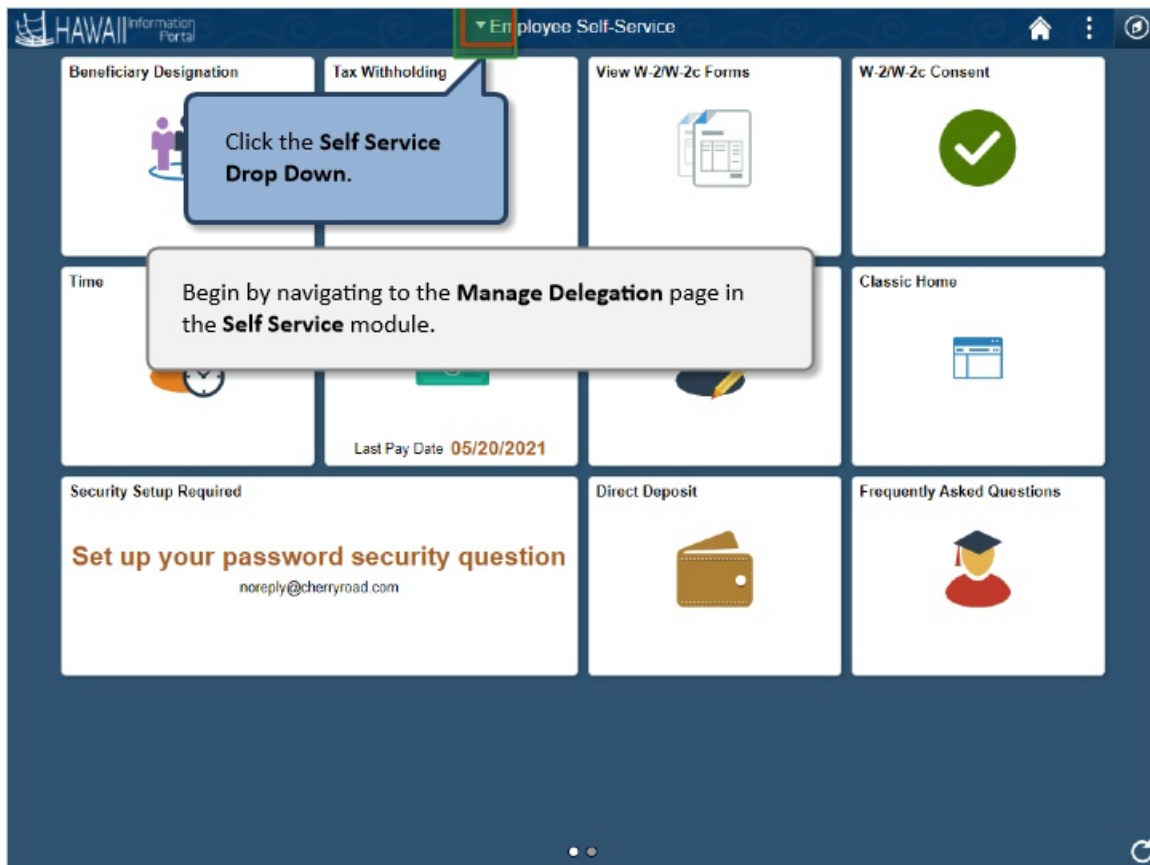
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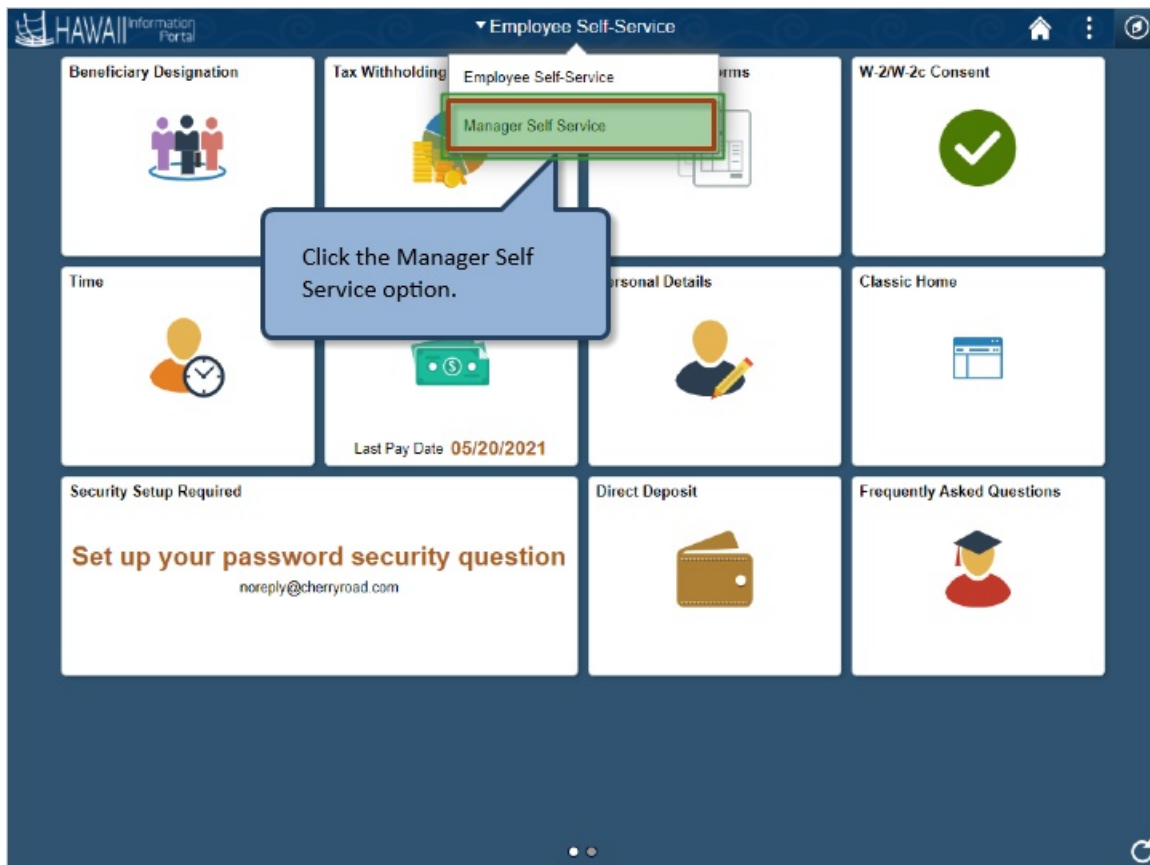
Also review the SOPP for delegation information at:

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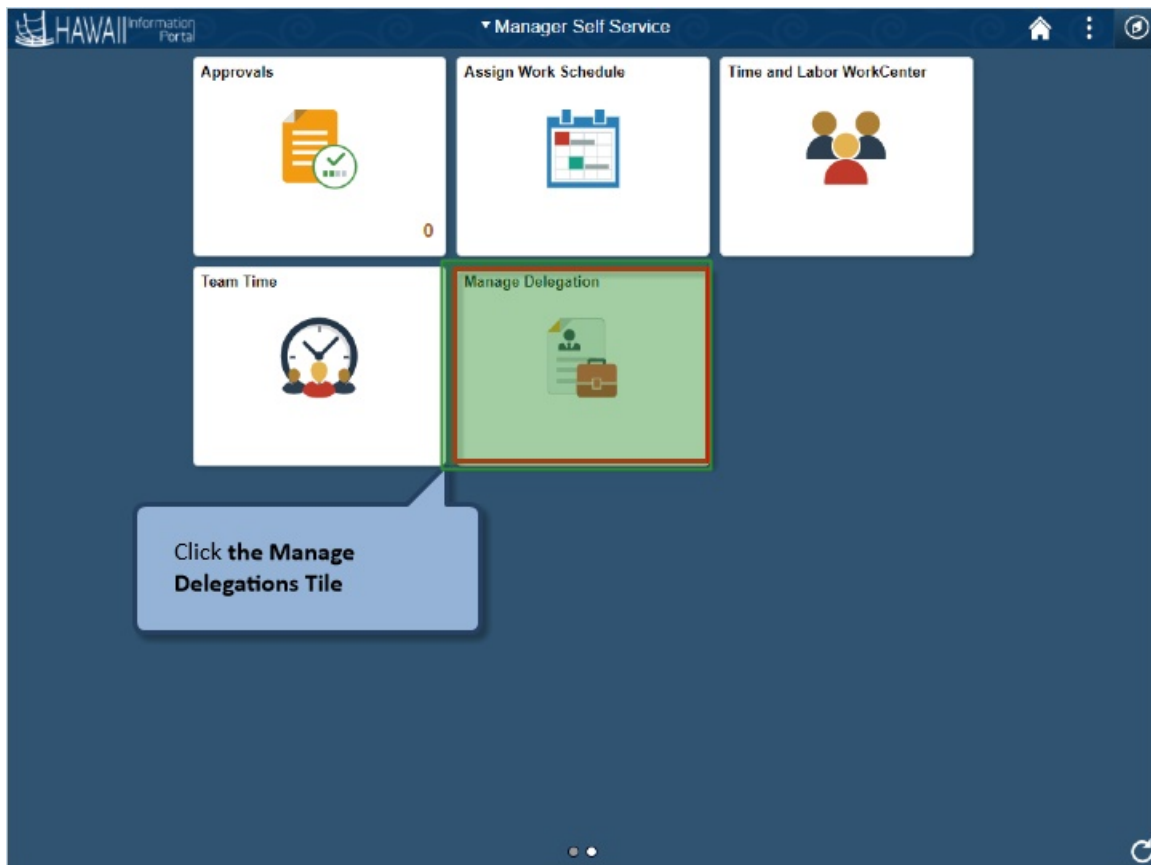


Begin by navigating to the **Manage Delegation** page in the **Self Service** module.

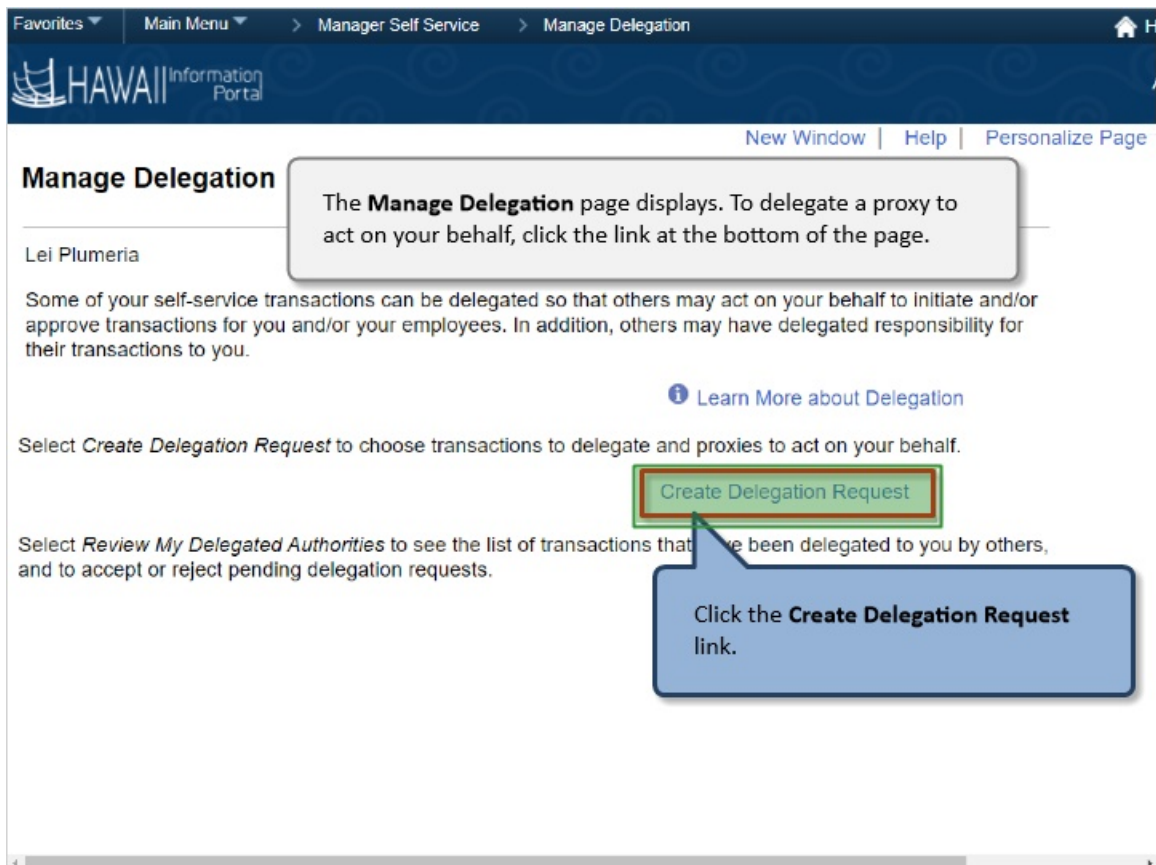
Click the **Self Service Drop Down**.



Click the Manager Self Service Option.



Click **the Manage Delegations Tile**.



The **Manage Delegation** page displays. To delegate a proxy to act on your behalf, click the link at the bottom of the page.

Click the **Create Delegation Request** link.

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Create Delegation Request


Enter Dates


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Band C

Enter the dates for your delegation request. Enter a *From Date* that is today or later. For open-ended requests, leave the *To Date* blank.

Delegation Dates

From Date 05/20/2021 

To Date 

Enter the dates for your delegation request.

- Enter a **From Date** that is today or later.
Note: The **From Date** defaults to today's date.
- Enter a **To Date** that is the same as or later than the **From Date**.
Note: For open-ended delegation requests, leave the **To Date** blank.

For this example, leave the **From Date** and enter 05/31/2021 as the **To Date**.

Click the **To Date** calendar icon.

Enter the dates for your delegation request.

- Enter a **From Date** that is today or later.
Note: The **From Date** defaults to today's date.

- Enter a **To Date** that is the same as or later than the **From Date**.
Note: For open-ended delegation requests, leave the **To Date** blank.

For this example, leave the **From Date** and enter 05/31/2021 as the **To Date**.

Click the **To Date** calendar icon.

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Create Delegation Request

Enter Dates

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Enter the dates for your delegation request. Enter a *To Date* that is the same as or later than your *From Date*. For open-ended requests, leave the *To Date* blank.

Delegation Dates

From Date: 05/20/2021

To Date:

Calendar


May 2021


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					

Click '31' on the calendar to select the date of May 31, 2021

Current Date

Click '31' on the calendar to select the date of May 31, 2021

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Create Delegation Request


Enter Dates


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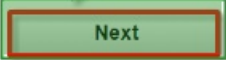

Band C

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 

Click the **Next** button.

Click the **Next** button.

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Create Delegation Request

Select Transactions

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

You can choose to select one or more transactions to delegate to a proxy.

Delegate Transactions

	Transaction
<input type="checkbox"/>	Employee Absence Balance
<input type="checkbox"/>	Employee Absence Balance Fluid
<input type="checkbox"/>	Employee Absence
<input type="checkbox"/>	Employee Absence
<input type="checkbox"/>	Employee Absence
<input type="checkbox"/>	Employee Absence
<input type="checkbox"/>	Employee Absence Request
<input type="checkbox"/>	Employee Absence Request Fluid

Click the checkbox next to **Employee Absence Request**.

You can choose to select one or more transactions to delegate to a proxy.

Click the checkbox next to **Employee Absence Request**.

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Create Delegation Request

Select Transactions

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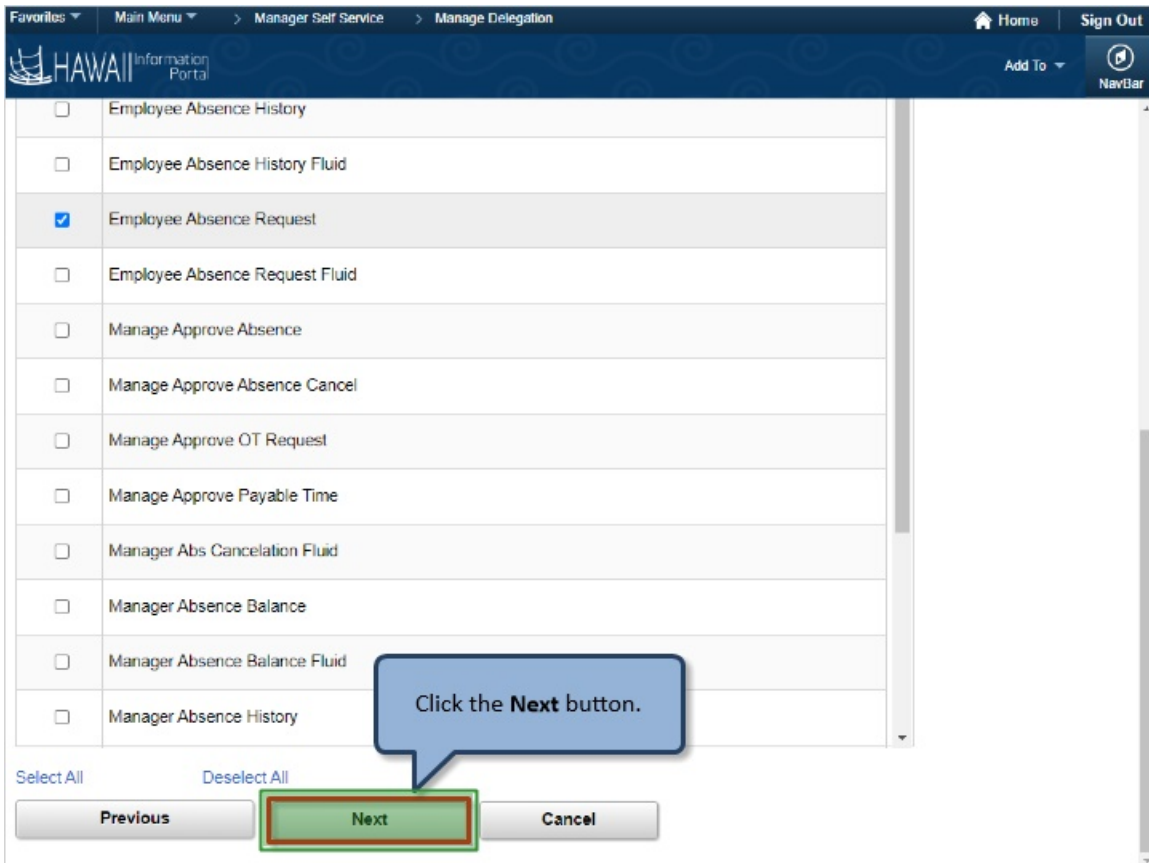
Select the transactions that you want to delegate to a proxy. You can select one or many transactions.

Delegate Transactions

	Transaction
<input type="checkbox"/>	Employee Absence Balance
<input type="checkbox"/>	Employee Absence Balance Fluid
<input type="checkbox"/>	Employee Absence Cancel Fluid
<input type="checkbox"/>	Employee Absence History
<input type="checkbox"/>	Employee Absence History Fluid
<input checked="" type="checkbox"/>	Employee Absence Request
<input type="checkbox"/>	Employee Absence Request Fluid

Click below the **scroll bar** to move down the page.

Click below the **scroll bar** to move down the page.



Navigation: Favorites ▾ Main Menu ▾ > Manager Self Service > Manage Delegation Home Sign Out

Buttons: Add To ▾ NavBar

<input type="checkbox"/>	Employee Absence History
<input type="checkbox"/>	Employee Absence History Fluid
<input checked="" type="checkbox"/>	Employee Absence Request
<input type="checkbox"/>	Employee Absence Request Fluid
<input type="checkbox"/>	Manage Approve Absence
<input type="checkbox"/>	Manage Approve Absence Cancel
<input type="checkbox"/>	Manage Approve OT Request
<input type="checkbox"/>	Manage Approve Payable Time
<input type="checkbox"/>	Manager Abs Cancellation Fluid
<input type="checkbox"/>	Manager Absence Balance
<input type="checkbox"/>	Manager Absence Balance Fluid
<input type="checkbox"/>	Manager Absence History

Buttons: Select All Deselect All

Buttons: Previous **Next** Cancel

Click the **Next** button.

Click the **Next** button.

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Create Delegation Request

Select Proxy by Hierarchy

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This page displays persons within your hierarchy that you can select as proxies. Select the name to select that person as a proxy. You can also select the [Search by Name](#) link to search for proxies outside your hierarchy.

[Search by Name](#)

Choose Delegate

	Name	Empl ID	Organizational Relationship
<input checked="" type="radio"/>	Cindy Doe		Employee
<input type="radio"/>			Employee
<input type="radio"/>			Employee
<input type="radio"/>			Engineering Program Mgr
<input type="radio"/>	Joan Doe		Operations Officer

This page displays persons within your hierarchy that you can select as proxies.

Note: Please ensure delegations are to people higher up in your organization so subordinates are not able to approve their own time and leave transactions as your proxy. (Not lateral or below you)

Use the radio button next to the name of the person to select that person as a proxy.

You can also select the **Search by Name** hyperlink to search for proxies outside your hierarchy.

Click the radio button next to 'Cindy Doe' to select her as your proxy.

This page displays persons within your hierarchy that you can select as proxies.

Note: Please ensure delegations are to people higher up in your organization so subordinates are not able to approve their own time and leave transactions as your proxy. (Not lateral or below you).

Use the radio button next to the name of the person to select that person as a proxy.

You can also select the **Search by Name** hyperlink to search for proxies outside your hierarchy.

Click the radio button next to “**Cindy Doe**” to select her as your proxy.

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Create Delegation Request

Select Proxy by Hierarchy

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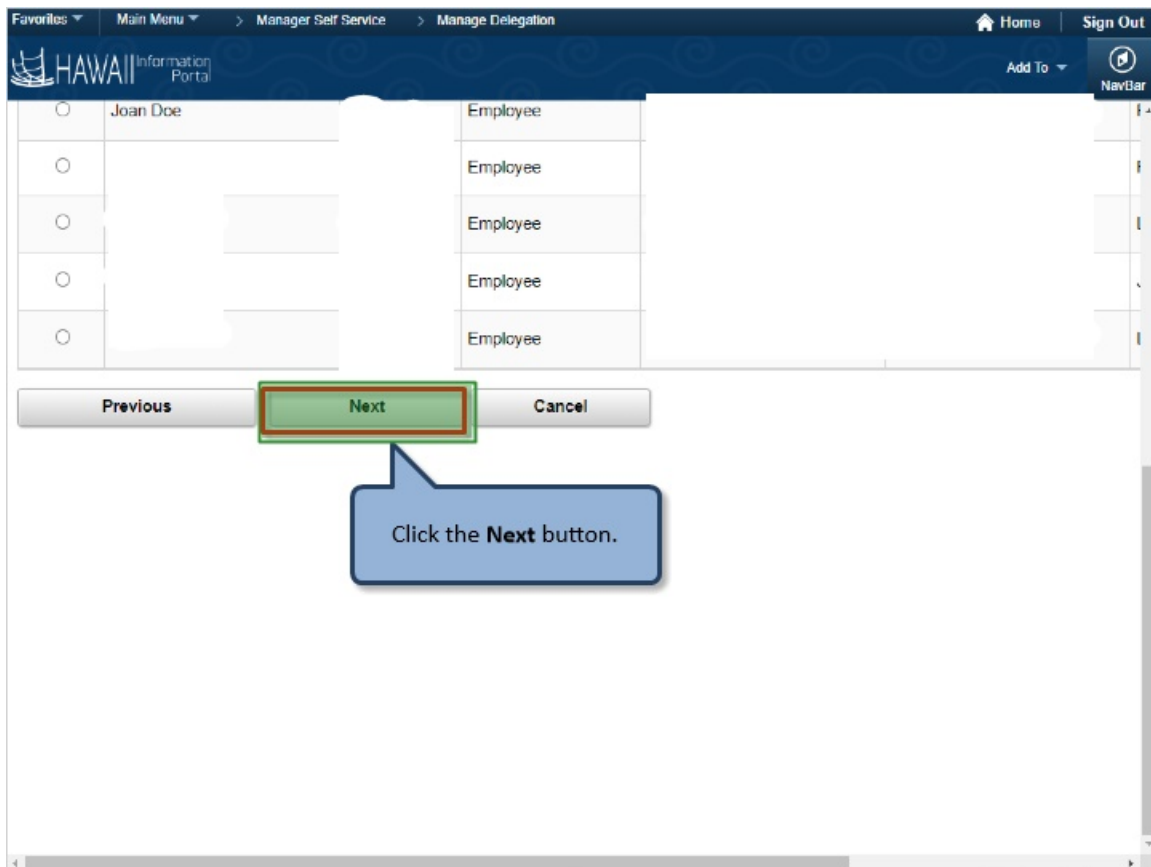
[Search by Name](#)

Choose Delegate

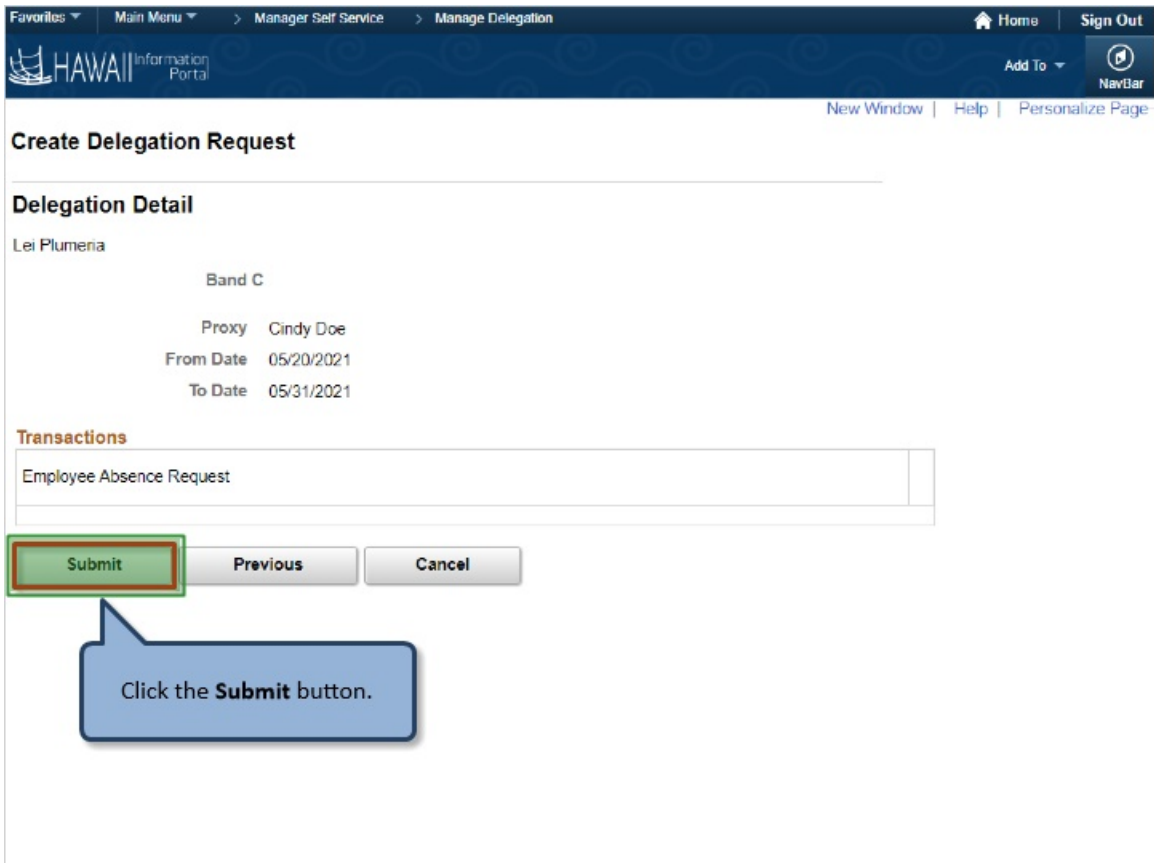
	Name	Empl ID	Organizational Relationship	Job Title	Department
<input checked="" type="radio"/>	Cindy Doe		Employee		
<input type="radio"/>			Employee		
<input type="radio"/>			Employee		
<input type="radio"/>			Employee		
<input type="radio"/>			Employee		
<input type="radio"/>	Joan Doe		Employee		

Click below the **scroll bar** to move down the page.

Click below the **scroll bar** to move down the page.



Click the **Next** button.



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Create Delegation Request

Delegation Detail

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Proxy Cindy Doe

From Date 05/20/2021

To Date 05/31/2021

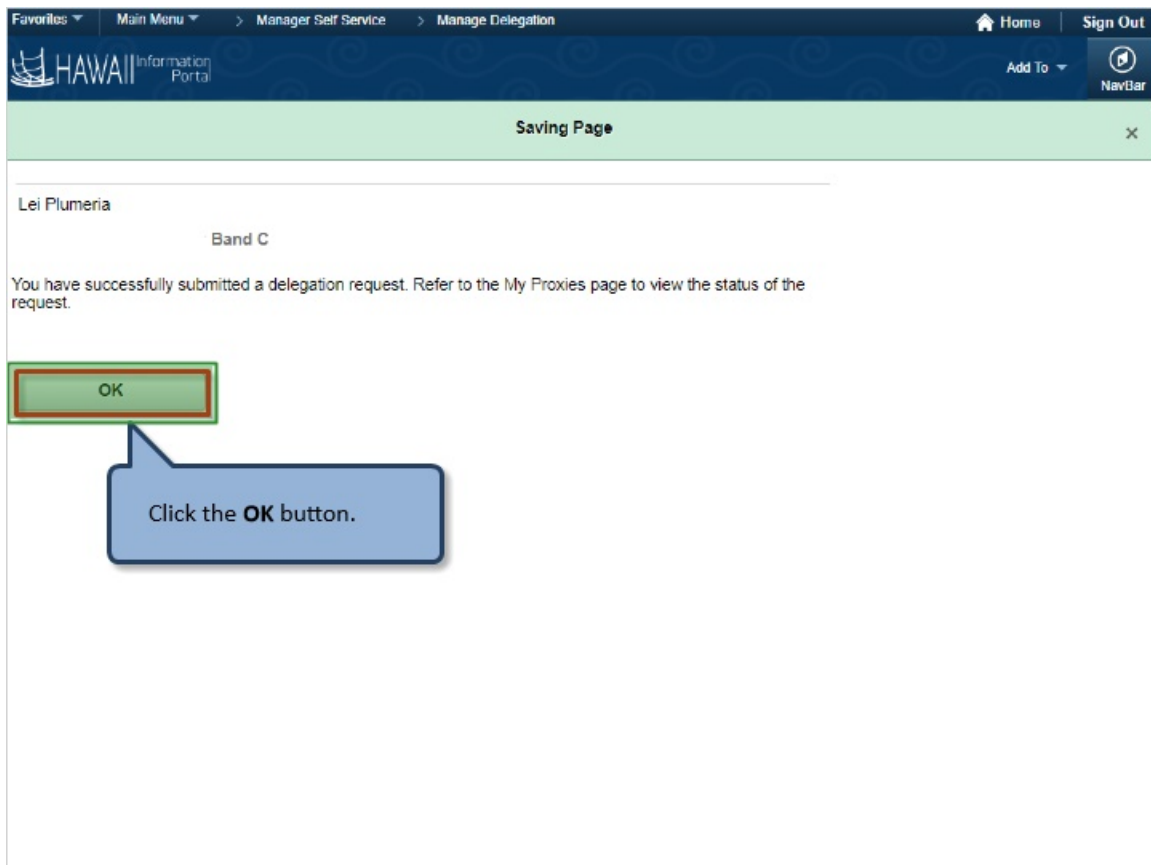
Transactions

Employee Absence Request

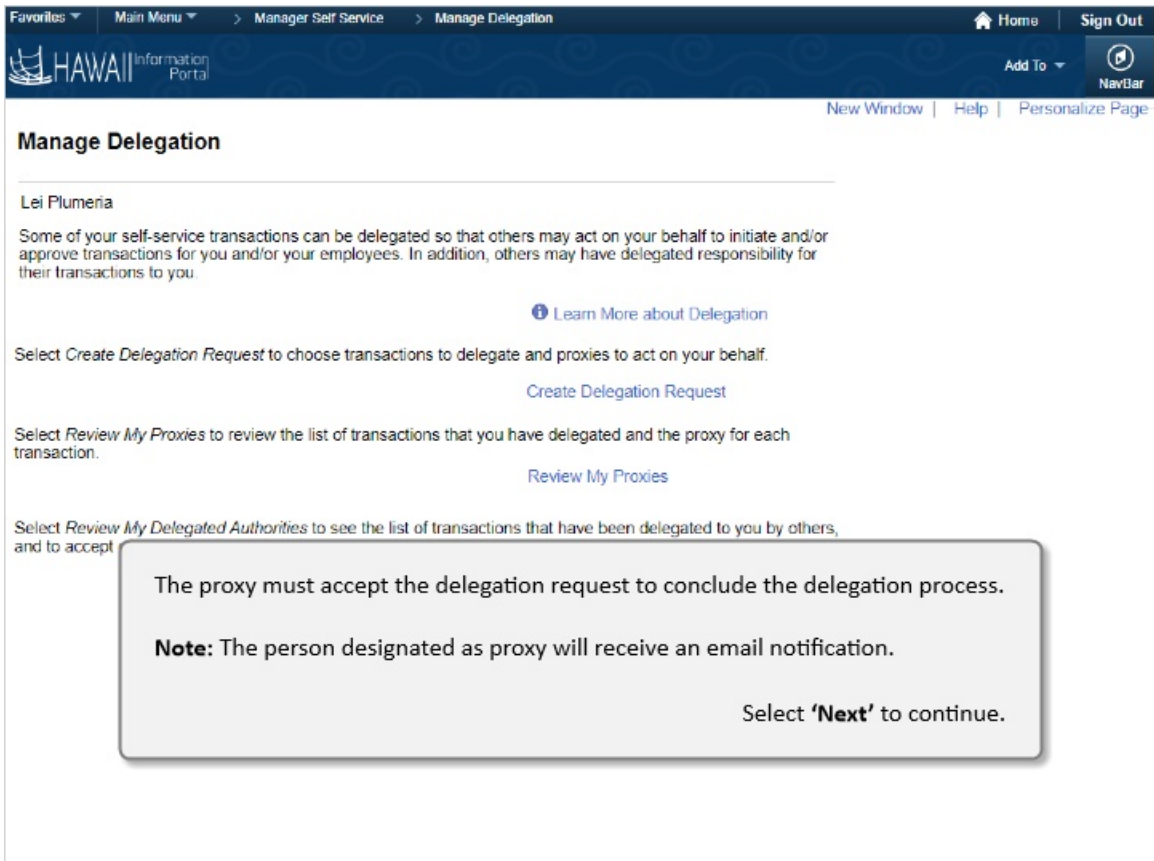
Submit Previous Cancel

Click the **Submit** button.

Click the **Submit** button.



Click the **OK** button.



Manage Delegation

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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](#)

Select *Review My Delegated Authorities* to see the list of transactions that have been delegated to you by others, and to accept

The proxy must accept the delegation request to conclude the delegation process.

Note: The person designated as proxy will receive an email notification.

Select **'Next'** to continue.

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