CALM
Absence Management System
Manager Self Service Delegation
Delegations Basics

Manager delegation is an optional feature in Manager Self Service (MSS).

The manager is responsible for initiating and managing the delegation process.

- To whom: A manager typically delegates authority to another person in the department, regardless if that person is in the reporting chain or not.
- For how long: A delegation can be for a specific or an indefinite period of time.

Managers interested in setting up delegations should contact HR for assistance.
Delegations Basics: Proxy

A "proxy" is the person to whom authority is delegated by the manager.

- A delegation request is created by the manager and accepted by the proxy.
  - A proxy cannot delegate that authority to another proxy.
  - If a proxy goes on vacation or a leave, the manager may revoke the delegation and re-delegate to another individual.
  - A standing "backup" is not available.

- Once a manager delegates the MSS authority, the proxy can see and do everything the manager does. The manager retains access to and use of MSS.
More About Delegations: Rules

The system delegates all four basic transactions to the proxy

1. Record Absence
2. Edit/Cancel Absence
3. Balance Statement View
4. Review Absence Balances

A manager can only delegate to one individual, i.e., proxy, at a time.

An individual can be a proxy for more than one manager.

HR recommends that departments develop a coordinated approach to managing delegations.
Initiating the Delegation Process

Access the Manage Delegation functionality from the Self Service menu.

Click on “Create Delegation Request” to initiate the process.
Creating a Delegation Request

STEP 1
Select the date range for which you would like to delegate. Leave the “To Date” blank if it is indefinite. Click “Next”.

Create Delegation Request

Enter Dates

Ben O’Drill

Admin 09, Human Res/Rel/Svcs

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: 07/05/2012

To Date: 

Next  Cancel
Selecting Transactions

STEP 2
Click “Next” on the Select Transactions page.

All four manager transactions are delegated. Click “OK” to confirm the pop-up window.

Create Delegation Request

Select Transactions

Ben O’Drill

Admin 09, Human Res/Roll/Svcs

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

<table>
<thead>
<tr>
<th>Transactions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Absence Balance</td>
</tr>
<tr>
<td>Manager Absence History</td>
</tr>
<tr>
<td>Manager Absence Request</td>
</tr>
<tr>
<td>Manager Balance Statement View</td>
</tr>
</tbody>
</table>

Message

All the Manager Absence functions have been turned on if you didn’t select all 4. (20058,1)

All 4 need to be delegated at the same time to the same person.
Selecting Proxy by Hierarchy

**STEP 3**
On the “Select Proxy by Hierarchy” page, select the person to whom you wish to delegate.

If the desired individual is not listed, click on the “Search by Name” link to select someone outside the hierarchy. Click “Search by Hierarchy” to return to that view, if necessary.

**Create Delegation Request**

**Select Proxy by Hierarchy**

Ben O’Drill

Admin 09, Human Res/Rel/Svcs

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

<table>
<thead>
<tr>
<th>Name</th>
<th>EmpID</th>
<th>Oro Relation</th>
<th>Department</th>
<th>Supervisor Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anita Lift</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

< Previous  Next  Cancel
**STEP 4**
Verify the data and click on the Submit button to process the delegation request.

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**Create Delegation Request**

**Delegation Detail**

Ben O’Drill

Admin 09, Human Res/Rel/Svcs

Proxy: Anita Lift

From Date: 07/05/2012

To Date: 

**Transactions**
- Manager Absence Balance
- Manager Absence History
- Manager Absence Request
- Manager Balance Statement View

---

< Previous  [Submit]  Cancel
Delegation E-Mail with Link

NOTIFICATION
An e-mail will be sent to the delegating manager and to the designated proxy* (refer to footnote below regarding a known “bug”).

Sample E-mail
Ben O’Drill or an administrator on behalf of Ben O’Drill has submitted a delegation request to you. Here are the details:
Transaction(s): Manager Absence Balance Manager Absence History Manager Absence Request Manager Balance Statement View
From: 2012-07-05
To: Manager
System to notify Ben O’Drill of each request: N

You can review the request, then accept or reject the request, using this link:

*The known bug with the notification is that requests go to the originating manager (as a copy) and not to the proxy. Workaround Solution: Managers should forward the e-mail to the proxy to follow the link to accept the delegation request.
Accepting the Request

ACCEPT
The link in the e-mail will direct the proxy to a page where they will accept the delegation request. Click the OK button to accept.

Accept Delegation Request

Anita Lift

Infrastruc Oper Analyst/Mgr I

You have successfully accepted a delegation request. Refer to the My Delegated Authorities page to view accepted delegation requests.

OK
CONFIRMATION
The manager who initiated the delegation will receive an e-mail confirm the acceptance of the delegation by the proxy.

Sample E-mail
Anita Lift has accepted a delegation request that you submitted. Here are the details:

Request Status: accepted

Transaction: Manager Absence Balance Manager Absence History Manager Absence Request Manager Balance Statement View

From: 2012-07-05
To: Manager

System to notify Ben O’Drill of each request: N Delegation Status: A

You can review the status of the request using the link below.

Managing Delegations: Manager

A manager can review and change the proxy designation by clicking on the “Review My Proxies” link.

Manage Delegation

Ben O'Drill

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
Reviewing Your Proxies: Manager

When reviewing the proxy information, a manager can revoke the proxy designation by clicking “Select All” and then “Revoke.” At that point, another proxy can be assigned, if desired.

My Proxies

Ben O’Drill

Admin 09, Human Res/Rel/Svcs

This page allows you to view your proxies and the request status for each delegation request. Select a particular status and click Refresh to show the matching requests. Click the information icon to view request details. To revoke requests, select the request, then click Revoke.

Show Requests by Status:

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Name</th>
<th>Job Title</th>
<th>From Date</th>
<th>To Date</th>
<th>Request Status</th>
<th>Delegation Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manager Absence Balance</td>
<td>Anita Lift</td>
<td>Infracr Op Analyst/Mgr</td>
<td>07/05/2012</td>
<td></td>
<td>Accepted</td>
<td>Active</td>
</tr>
<tr>
<td>Manager Absence History</td>
<td>Anita Lift</td>
<td>Infracr Op Analyst/Mgr</td>
<td>07/05/2012</td>
<td></td>
<td>Accepted</td>
<td>Active</td>
</tr>
<tr>
<td>Manager Absence Request</td>
<td>Anita Lift</td>
<td>Infracr Op Analyst/Mgr</td>
<td>07/05/2012</td>
<td></td>
<td>Accepted</td>
<td>Active</td>
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<td>Manager Balance Statement View</td>
<td>Anita Lift</td>
<td>Infracr Op Analyst/Mgr</td>
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<td></td>
<td>Accepted</td>
<td>Active</td>
</tr>
</tbody>
</table>

1. **Select All**  
2. **Revoke**  

Return to Manage Delegation
Managing Delegation: Proxy

See what has been delegated to you by clicking the link “Review My Delegated Authorities.” You can delegate your own manager authorities (if you are a manager) by clicking the “Create Delegation Request” link. You may not, however, re-delegate authorities you have as a proxy.

Manage Delegation

Anita Lift

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.

Select Create Delegation Request to choose transactions to delegate and proxies to act on your behalf.

Will only appear if you are a manager

Create Delegation Request

Select Review My Delegated Authorities to see the list of transactions that have been delegated to you by others, and to accept or reject pending delegation requests.

See what has been delegated to you

Review My Delegated Authorities
Reviewing Delegated Authorities

If you are a proxy, this page shows what has been delegated to you. On the screen shot below, please note that once the Request Status changes from “Submitted” to “Accepted,” it can only be revoked by the originating manager. The Accept and Reject buttons will not appear as they do below.

My Delegated Authorities

Anita Lift

Infrastruc Oper Analyst/Mgr I

This page allows you to view your delegated authorities. Select a particular status and click Refresh to show the matching requests. Click the information icon for request details.

Show Requests by Status:

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Name</th>
<th>Job Title</th>
<th>From Date</th>
<th>To Date</th>
<th>Request Status</th>
<th>Delegation Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiple Transactions</td>
<td>Ben O’Drill</td>
<td>Admin 09, Human Res/Rel/Svcs</td>
<td>07/05/2012</td>
<td></td>
<td>Submitted</td>
<td>Inactive</td>
</tr>
</tbody>
</table>

Select All  Clear All  Accept  Reject

Return to Manage Delegation
What You Will See If You Are a Proxy

If you are acting in your proxy role and you enter MSS, you will be asked to indicate if you are acting as the manager of your own employees (if you have any) or as the proxy for another manager.

Balance Statement View

Enter the Effective Date

Enter the effective date to view your direct reports.  

As Of: 07/06/2012

Delegated Authority

You have been delegated authority to process transactions for employees reporting to the manager(s) listed here. If you would like to process transactions for employees reporting to one of these listed managers instead of your own employees, select one of these managers, otherwise select 'I want to process my own employees'.

- Process my own Employees
- Ben O'Drill  Lead Baker  Bakery  Natalie Attired

Continue
Managers interested in setting up delegations should contact HR for assistance.

Call: 258-3300, menu option 4
E-mail: calm@princeton.edu