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EmpowHR: Section 9 - Manager Self Service

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EmpowHR

SECTION 9
Manager Self Service

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Manager Self Service (MSS)

Manager Self Service (MSS) provides managers with the tools and information they need to administer certain aspects pertaining to employees' professional development. It eliminates paperwork and provides managers with a method to track information on each employee. Managers are able to:

- Initiate a Personnel Action Request (PAR)
- Initiate a Fill-a-Position request
- Request new positions
- Manage PARs
- Review transactions
- Delegate approvals

Managers may only perform personnel requests for their direct reports and their subordinates. Once a manager initiates a request, it passes through an approval workflow process that is specified by the Agency. Once the request is approved, it is submitted to the appropriate EmpowHR module for processing.

This section includes the following topics:

Configuring Manager Self Service (MSS)

For PARs, each Agency will have a custom MSS Configuration page which identifies the types of requests a manager can perform, as well as the workflow and PAR status associated with the request. This template is the foundation for the MSS PAR and must be established before any request can be made. Agency administrators will have the ability to copy rows from a template provided by the National Finance Center (NFC), in order to create their own custom template. The Agency administrator will have the ability to:

- Initiate the Agency MSS Configuration template.

- Activate and deactivate the types of requests which a manager can perform.
- Customize the Nature of Action Code (NOAC) request descriptions for their specific Agency.
- Select the point in which the request will enter the Human Resources (HR) processing workflow.
- Select the backoffice work-in-progress (WIP) status of the PAR.

To Initiate the MSS Configuration Template:

1. Select the ***EmpowHR Setup Tables (HD)*** menu group.
2. Select the ***MSS Configuration*** component. The MGR PAR Request Configuration page is displayed with the following populated fields:

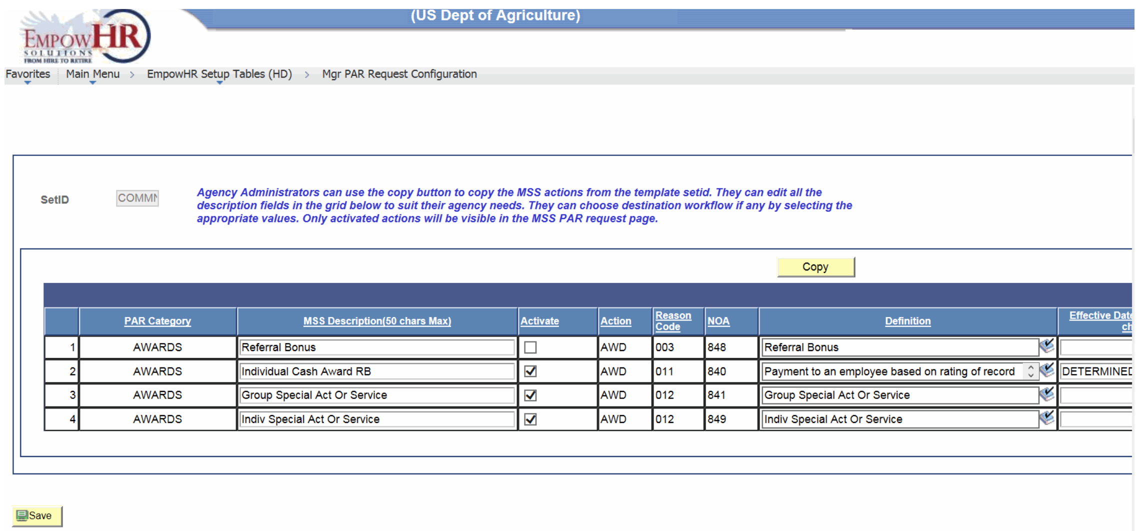


Figure 1: Mgr PAR Request Configuration Page

Field	Description/Instruction
SetID	Populated with the Set ID associated with the user identification (ID). If the user has access to multiple Set IDs, a look-up icon will appear next to the SetID field.
PAR Category	Identifies the type of action being performed by the manager (i.e., award).
MSS Description (50 Chars Max)	Identifies the action being performed by the manager.
Activate	Check this box to activate each applicable action. Before an action can be used, the administrator must activate it.
Action	Displays the action being performed. This value will be displayed on the employee's PAR in the ***HR Processing*** component once the record is

Field	Description/Instruction
	created.
Reason Code	Displays the reason code that relates to the action being performed. This value will be displayed on the employee's PAR in the ***HR Processing*** component once the record is created.
NOA	Displays the NOAC that relates to the action being performed. This value will be displayed on the employee's PAR in the ***HR Processing*** component once the record is created.
Definition	Populated with the definition of the action being performed.
Effective Date Requirements (200 Chars Max)	Used to provide the manager assistance in determining the effective date of the action. This field is configurable by the Agency.
HR Requirement (100 Chars Max)	Contains the template setup field. The value in this column is not displayed on the MSS PAR Request page.
Business Process Name	Displays the HR processing workflow that the transaction should follow. Note: It is critical that the Agency administrator be familiar with the Agency's specific workflow.
WIP Activity	Determines which step of the workflow the action is inserted. Note: By selecting **`Initiator`**, the approved MSS PAR would be inserted after the Initiator role and be routed to the approver. By selecting **`Approver`**, the action would be routed to the Processor.
Backoffice WIP Status	Displays the PAR status of the action that is based on the role selected in the WIP Activity field.

Note: Before initializing, the template will be blank for the Agency. The Agency administrator must copy the actions from the NFC template. NFC will maintain the master template. Any actions that must be added to the MSS Configuration template will be added to the NFC template and must be copied by the Agency.

3. Click **Copy**. A popup appears.

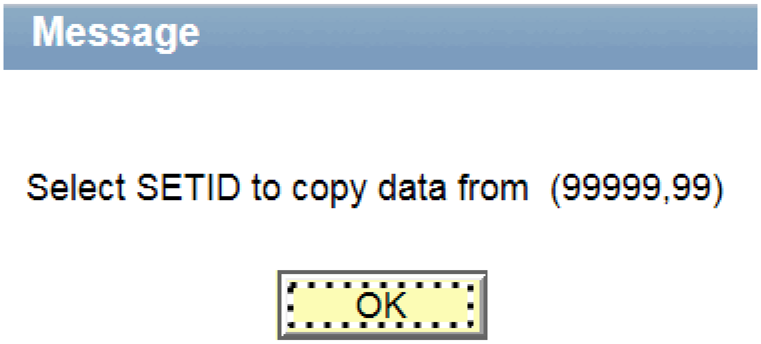


Figure 2: Copy Popup

4. Click **OK**. The Source SetID field is displayed.

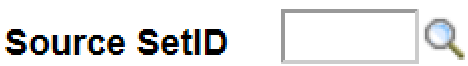


Figure 3: Source SetID Field

5. Complete the field as follows:

Field	Instruction
Source SetID	Template from which you are copying. Select **TMPLT** by clicking the search icon and selecting from the results. **TMPLT** is the NFC-maintained master template. By selecting **TMPLT**, the actions and all configuration defaults from the TMPLT will be populated on the Agency MSS Configuration page.

6. Update the additional fields on the MGR PAR Request Configuration page as applicable:

Field	Description/Instruction
PAR Category	Identifies the type of action being performed by the manager (i.e., award).
MSS Description (50 Chars Max)	Identifies the action being performed by the manager.
Activate	Check this box to activate each applicable action. Before an action can be used, the administrator must activate it.
Action	Displays the action being performed. This value will be displayed on the employee's PAR in the ***HR Processing*** component once the record is created.
Reason Code	Displays the reason code that relates to the action being performed. This value will be displayed on the employee's PAR in the ***HR Processing*** component once the record is created.

Field	Description/Instruction
NOA	Displays the NOAC that relates to the action being performed. This value will be displayed on the employee's PAR in the ***HR Processing*** component once the record is created.
Definition	Populated with the definition of the action being performed.
Effective Date Requirements (200 Chars Max)	Used to provide the manager assistance in determining the effective date of the action. This field is configurable by the Agency.
HR Requirements (100 Chars Max)	Contains the template setup field. The value in this column is not displayed on the MSS PAR Request page.
Business Process Name	Displays the HR processing workflow that the transaction should follow. Note: It is critical that the Agency administrator be familiar with the Agency's specific workflow.
WIP Activity	Determines which step of the workflow the action is inserted. Enter the applicable WIP activity or select an activity by clicking the search icon. Note: By selecting **Initiator**, the approved MSS PAR would be inserted after the Initiator role and be routed to the approver. By selecting **Approver**, the action would be routed to the Processor.
Backoffice WIP Status	Displays the PAR status of the action that is based on the role selected in the WIP Activity field.

Note: If the WIP Activity and Backoffice WIP Status fields are left blank, the HR Initiator will receive an email that a PAR has been initiated. This will also be the case if the Business Process Name, WIP Activity, and Backoffice WIP Stats fields are left blank.

7. Click **Save** to save the Agency template.

Initiating Personnel Action Requests (PAR)

The ***Manager PAR Request*** component allows managers to initiate certain PARs for employees in their organization. Once the PAR is initiated, it is sent through the appropriate approval channels. Managers can review the approval status of a request through the ***Review Transactions*** component. For more information, see ***Reviewing Transactions*** (on page 20).

Upon final approval, the PAR is sent to HR personnel for further processing. The point at which the request enters the HR workflow is determined by the Agency administrator. Once the action has been processed by HR, the initiating manager will receive a notification that the transaction has been processed.

Note: The types of PARs available through the ***Manager PAR Request*** component are configured by each Agency.

To Initiate a PAR Request:

1. Select the ***Manager Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Manager PAR Request*** component. The Manager PAR Request page is displayed.

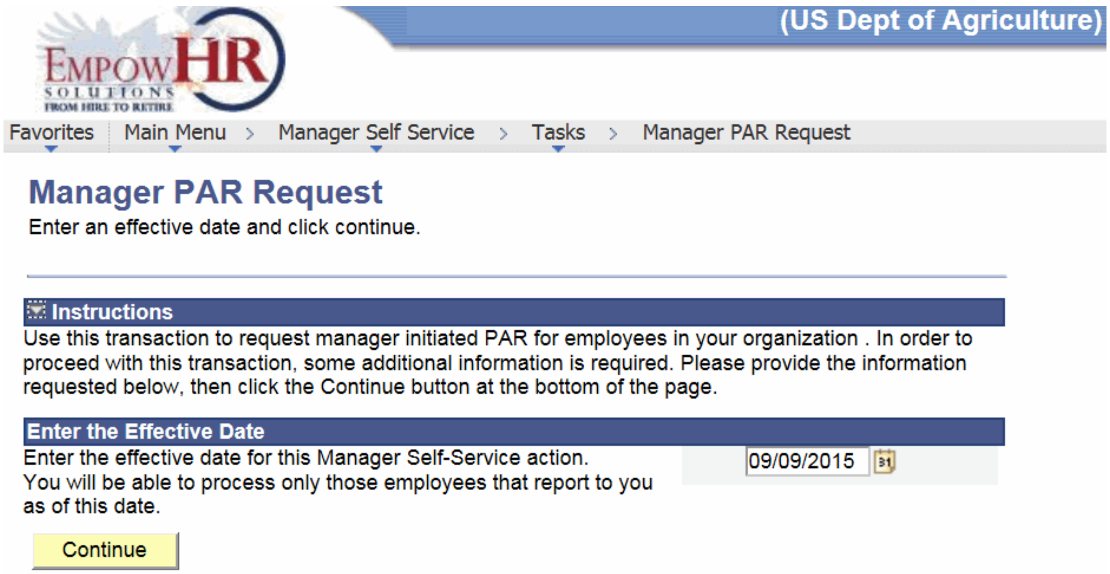


Figure 4: Manager PAR Request Page

4. Complete the field as follows:

Field	Instruction
Enter the Effective Date	Enter the effective date for the MSS action or select a date by clicking the calendar icon.

5. Click **Continue**. The Manager PAR Request Page is displayed with a list of vacant positions and employees that report directly to the manager.

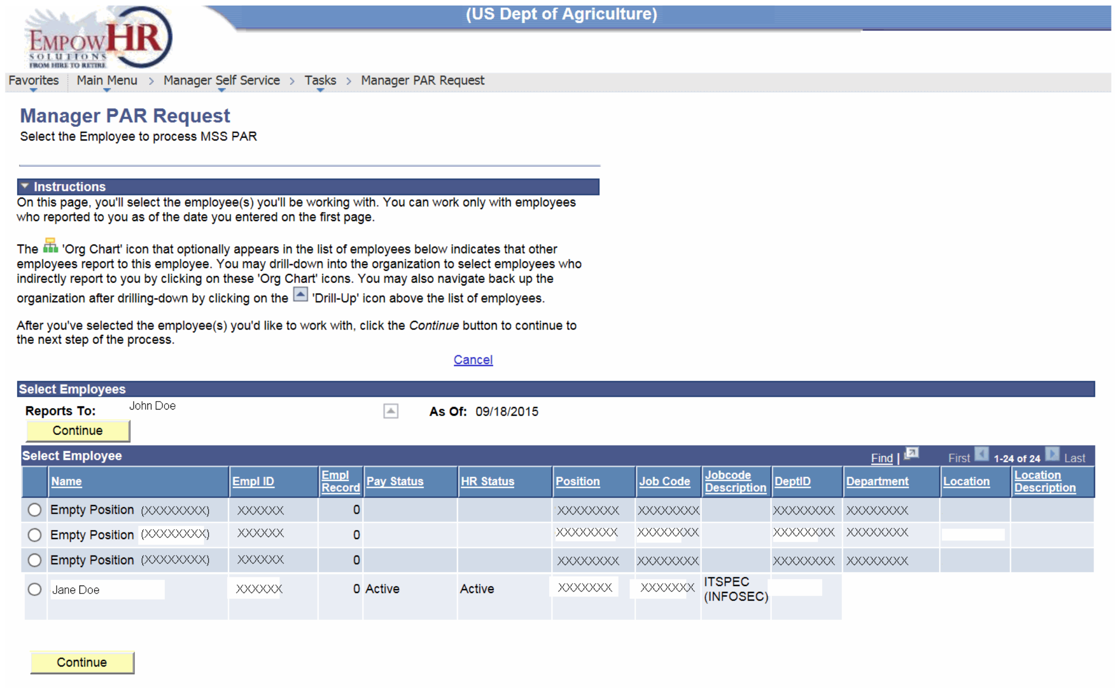


Figure 5: Manager PAR Request Page (with list of vacant positions and employees)

6. Select an employee for whom the PAR will be initiated. The Manager PAR Request Page (with an employee selected) is displayed.

Note: You must select an employee. If you select a vacant position, an error message will be displayed.

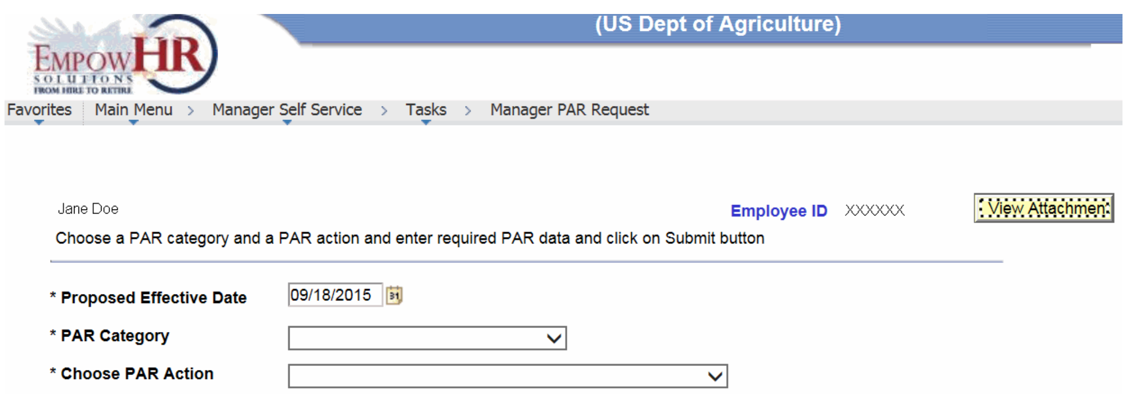


Figure 6: Manager PAR Request Page (with employee selected)

7. Complete the fields as follows:

Field	Description/Instruction

Field	Description/Instruction
Employee ID	Populated based upon the employee selected.
***Proposed Effective Date**	Required field. Populated with the date selected on the Manager PAR Request page. Change the date by clicking the calendar icon.
***PAR Category**	Required field. Select the applicable PAR category from the drop-down list.
***Choose PAR Action**	Required field. Select the applicable PAR from the drop-down list.

8. Click **Continue**. The PAR Category Selection page is displayed.

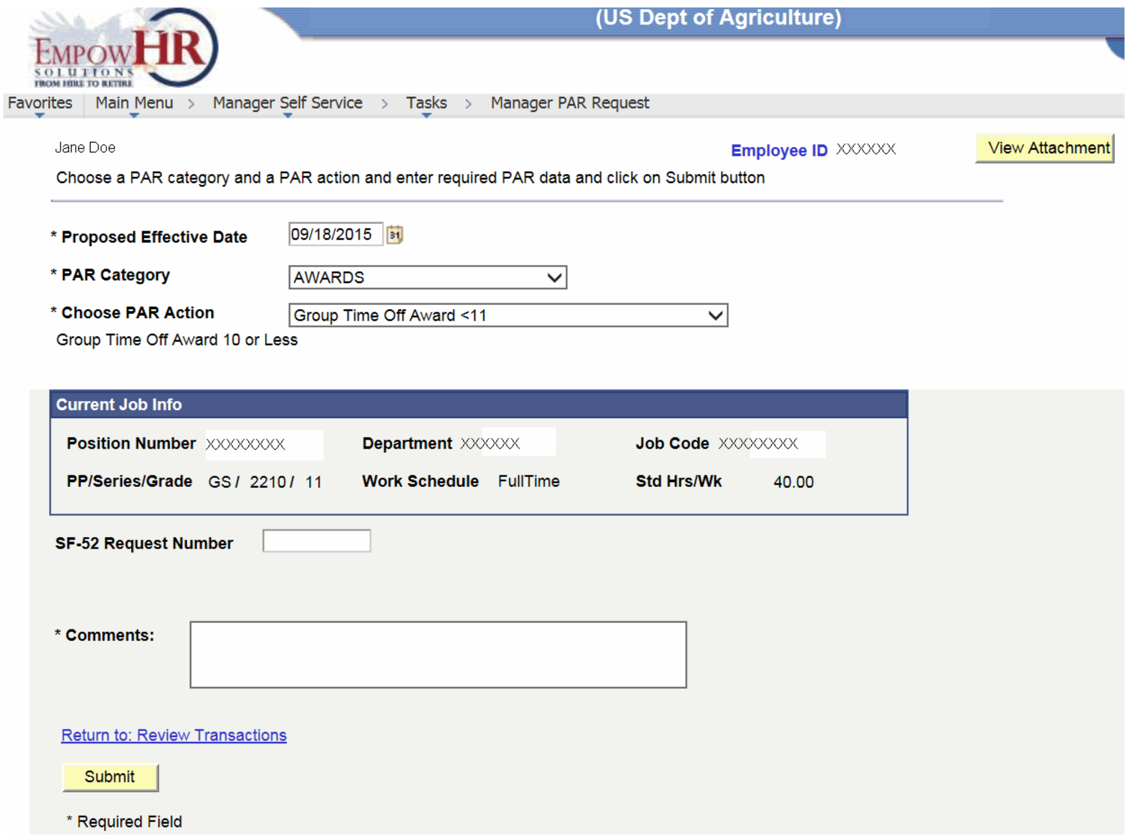


Figure 7: PAR Category Selection Page

9. Depending on the PAR Category and the PAR Action selected, the required fields for that specific action will be displayed below the PAR Category and Choose PAR Action selections. Complete the required fields that appear.

   The Current Job Info for the PAR will be displayed at the bottom of the page. At this point, the Initiator can add attachments to the request.

Note: Once a PAR has been successfully initiated, the **Add Attachment** button allows the Initiator to add attachments to the request.

Note: The user may also view the current attachments by selecting the applicable attachment and clicking **View Attachment**. Attachments can only be deleted by the user who uploaded the file or by a user who has an administrative role.

10. After completing all applicable fields, click **Submit**. The action is submitted.

Approving/Denying a Personnel Action Request (PAR)

The request has been initiated and will now begin to go through the approval workflow. The approval workflow is determined by the Agency and each workflow can be any number of steps. The initiator is not considered a part of the workflow; therefore, the workflow begins with the first approver in the chain.

Each approver in the workflow will receive an email regarding a pending PAR. The approver can access the request by clicking the link provided in the email or through the ***Review Transactions*** component. For more information, see ***Approving/Denying Requests*** (on page 21).

Processing a Personnel Action Request (PAR)

Once a PAR is initiated and the MSS transaction has completed the approval workflow, it is sent to HR personnel for processing. The MSS Agency Administrator determines which step in the HR Processing workflow the request will be inserted. The request will be displayed on the HR personnel's worklist, and they should follow the normal HR processing workflow for their Agency. For more information, see Section 5, PAR Processing, of the EmpowHR procedure.

Fill a Position

The ***Fill a Position*** component allows managers to create the following requests:

- **New -** Used to request a new position based on an existing Job Code. This request will automatically create a position record upon final approval.
- **Recertify -** Used to request a new position based on an existing position when minimal changes need to be made to the duties. This request will not automatically generate a position record upon final approval. The last approver in the approval workflow will be required to manually create the position record or to notify the appropriate processor.
- **Update -** Used to request a new position based on an existing position when changes are required to the duties performed. This request will not automatically generate a position record upon final approval. The last approver in the approval workflow will be required to manually create the position record or to notify the appropriate processor.

For more information see:

Filling a New Position

The Fill a New Position process enables managers to request a classification and complete recruit and fill information for a new position based on an existing job code. Once the request is complete and all approvals are obtained, the position will automatically be created in the EmpowHR Position Management module.

Note: When requesting a new position, a supporting Job Code must already exist. The manager is only requesting the creation of a new position with an existing job code.

To Fill a New Position:

1. Select the ***Manager Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Fill a Position*** component. The Fill a Position page - Add a New Value tab is displayed.

Figure 8: Fill a Position Page - Add a New Value Tab

4. Complete the field as follows:

Field	Instruction
Job Requisition	Enter the applicable number of the position to be filled.

5. Click **Add**. The Fill a Position page is displayed.

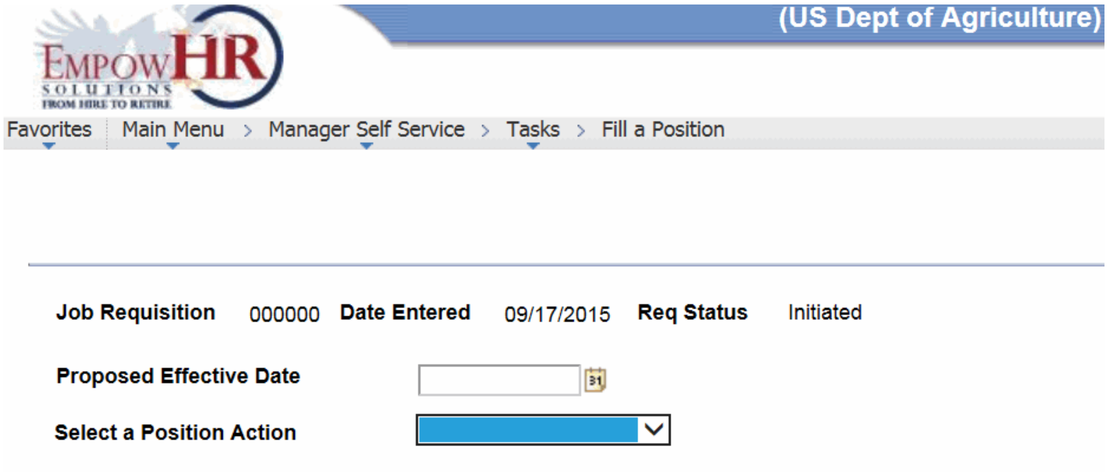


Figure 9: Fill a Position Page

6. Complete the fields as follows:

Field	Description/Instruction
Job Requisition	Populated with a unique identifier for this request. This number is generated when the request is submitted. This identifier will follow the request through the approval process.
Date Entered	Populated with the current date and reflects the date the request was created.
Req Status	Populated with the current status of the request.
Proposed Effective Date	Enter the date the new position is to be effective or select a date by clicking the calendar icon.
Select a Position Action	Select **New** from the drop-down list to fill a new position.

The New Position Classification section is displayed.

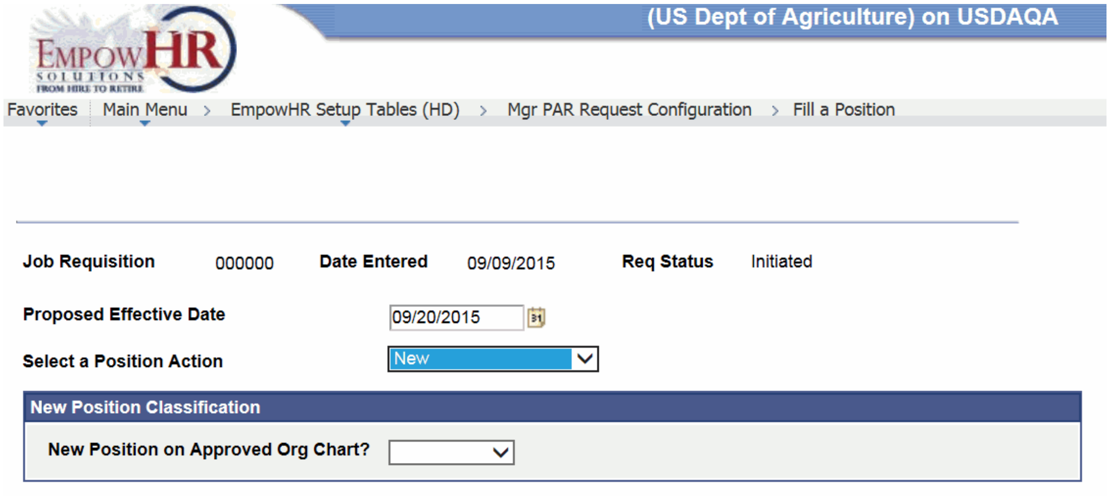


Figure 10: Fill a Position Page - New Position Classification

7. Complete the New Position on Approved Org Chart? field as follows:

New Position Classification	Instruction
New Position on Approved Org Chart?	Select whether or not the new position is on an approved organizational chart. By selecting **Yes**, the Job Code/Title, No ASPD?, and Create an Additional Identical fields are displayed. Note: The new position must be on an approved organizational chart to continue.

The next fields in the New Position Classification section are displayed.

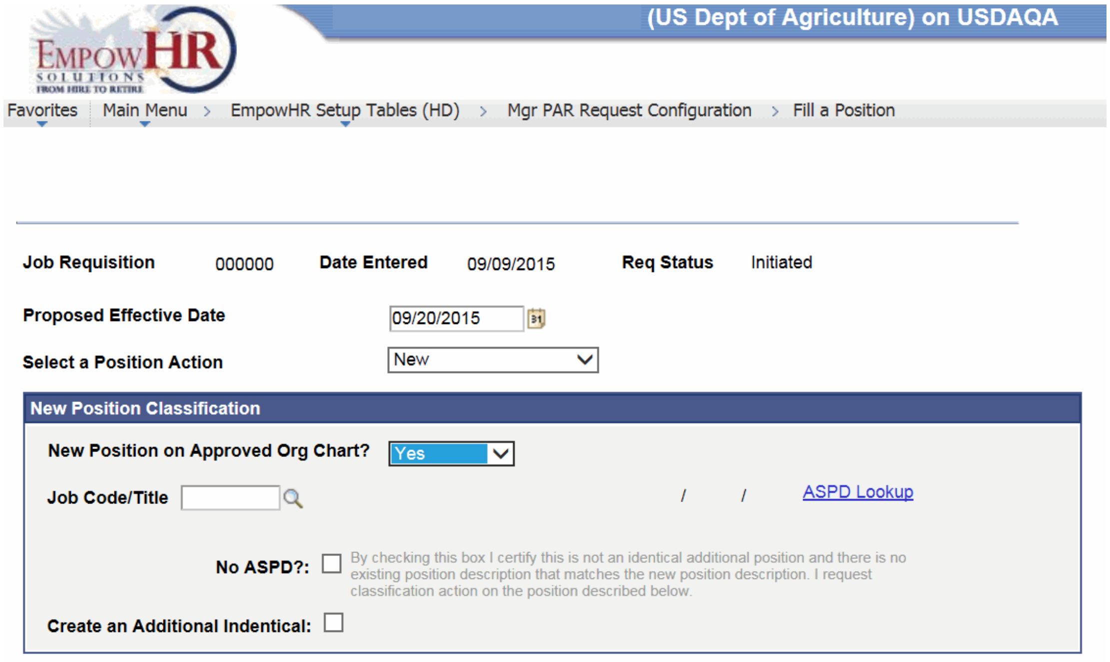


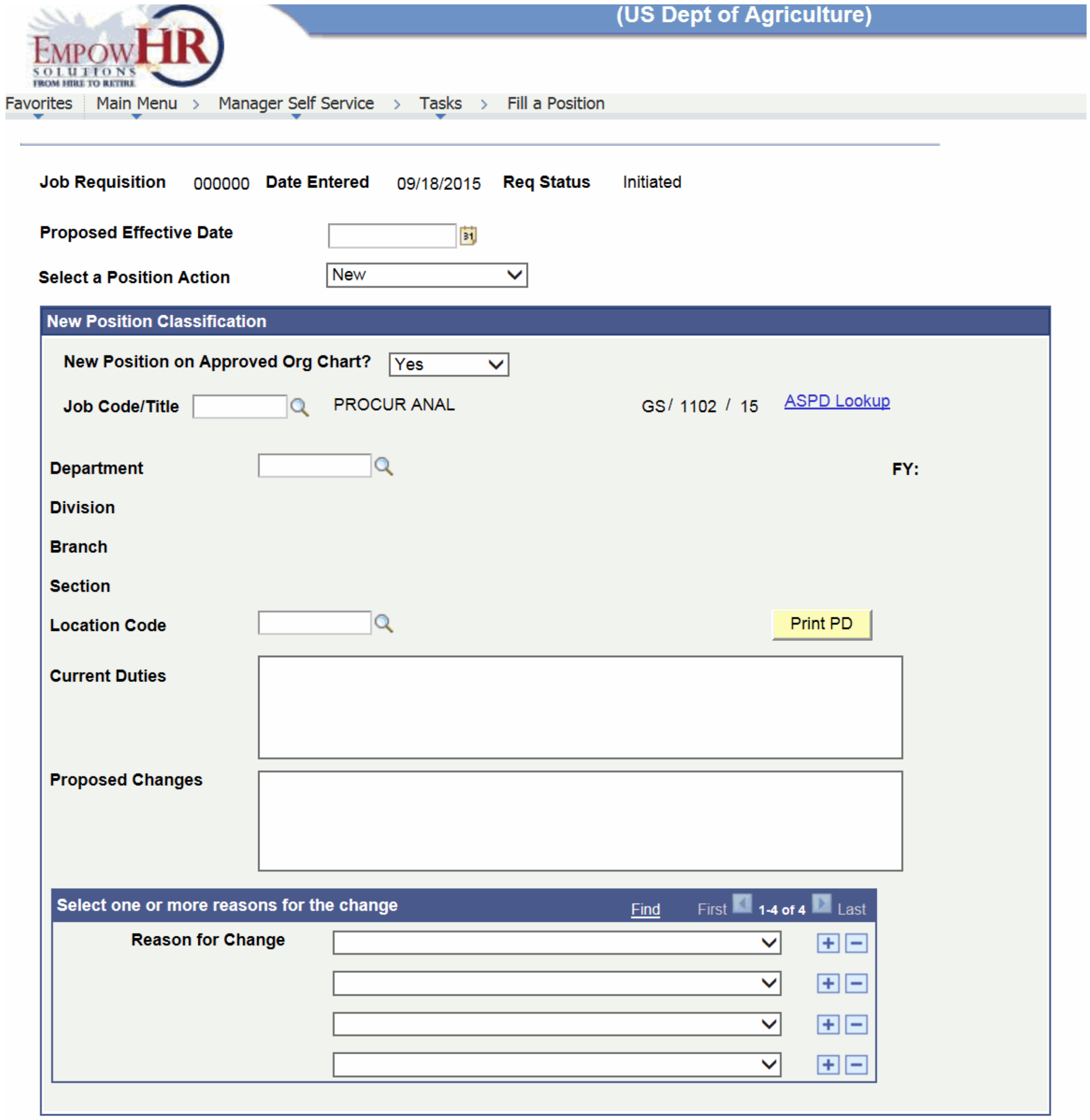
Figure 11: Fill a Position Page - New Position Classification - Approved Org Chart

8. Complete the additional fields as applicable:

Field	Instruction
Job Code/Title	Enter the job code or select a code by clicking the search icon. After entering or selecting a job code, new fields are displayed. Note: If the Create an Additional Identical field is checked, this field is not required to be completed.
No ASPD?	Check this box to affirm that no ASPD is available.
Create an Additional Identical	Check this box if this position is going to be created from an existing position. If this box is checked, the manager will be required to enter the position number of the position that the new position will be created from, but will not be required to enter the Job Code, Department, or Location.

If the Job Code/Title field is completed, the remaining fields in the New Position Classification section, the Position Type section, the Outreach section, the Benefits section, the Justification section, and the Supervisory Certification fields are displayed.

9. Complete the additional fields as applicable:



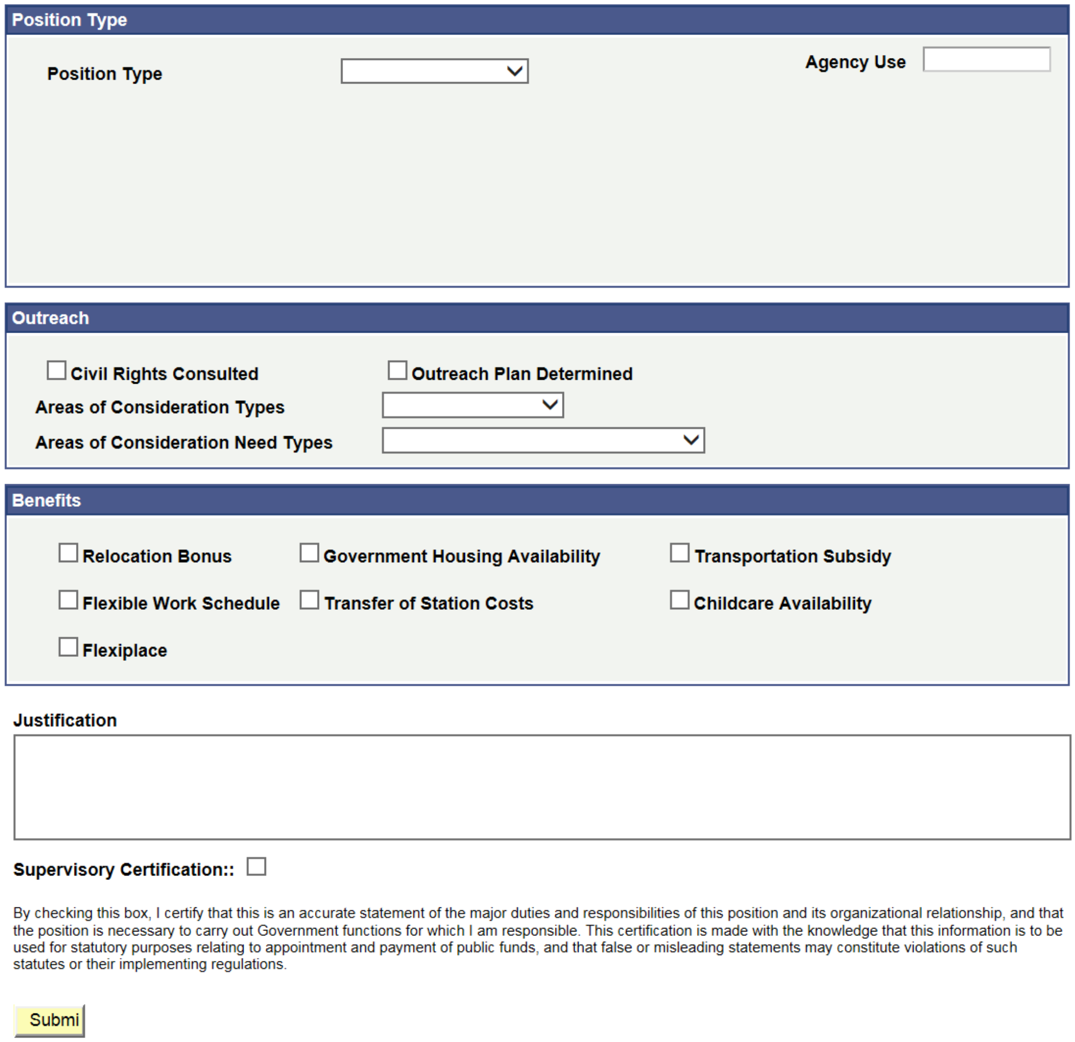


Figure 12: Fill a Position Page (after entering or selecting a job code)

Field	Description/Instruction
Department	Enter the Department or select a Department by clicking the search icon. The description of the Department entered or selected appears to the right of the field.
Division	Populated based on the Department entered or selected.
Branch	Populated based on the Department entered or selected.
Section	Populated based on the Department entered or selected.
Location Code	Enter the location code or select a code by clicking the search icon. The description of the location code entered or selected appears to the right of the field.
Current Duties	Enter the job duties.
Proposed Changes	Enter the proposed changes to the job.

Field	Description/Instruction
Select one or more reasons for the change	**Instruction**
Reason for Change	Click the down arrow to select the applicable reason.
Position Type	**Instruction**
Position Type	Select the position type from the drop-down list. The selection from this list will generate additional fields depending on the selection made.
Agency Use	Used by Agency as a free-form field.
Outreach	**Instruction**
Civil Rights Consulted	Check this box if applicable.
Outreach Plan Determined	Check this box if applicable.
Areas of Consideration Types	Select the areas in which candidates may be considered from the drop-down list.
Areas of Consideration Need Types	Select the areas of consideration need types from the drop-down list.
Benefits	**Instruction**
Relocation Bonus	Check this box if a relocation bonus is available for this position.
Government Housing Availability	Check this box if Government housing is available for this position.
Transportation Subsidy	Check this box if transportation subsidy is available for this position.
Flexible Work Schedule	Check this box if a flexible work schedule is available for this position.
Transfer of Station Costs	Check this box if transfer of station costs is available for this position.
Childcare Availability	Check this box if childcare is available for this position.
Flexiplace	Check this box if flexiplace is available for this position.
Justification	Enter the justification details for the reason the position is being created.
Supervisory Certification	Check this box to acknowledge that as the requester/initiator the information provided is to the best of their knowledge and that you understand the consequences for supplying false or misleading information.

10. Click **Submit** to submit the new position for approval and processing. A popup appears to notify the manager that the request has been submitted. The Fill a Position Status page is displayed with the approval workflow at the bottom.

Note: If the request has a single approver, the approver's name will be displayed in the approver box. If the request has more than one approver, the approval box will display **`Multiple Approvers`**. The list of multiple approvers can be viewed by clicking the ***Multiple Approvers*** link.

Recertifying/Updating a Position

The Recertify a Position process enables managers to validate whether a position is still available to be filled. The Update a Position process enables managers to submit updates to a position. Unlike the Fill a New Position process, recertifications and updates will not automatically update the Position Management module. The final approver is required to process the recertification or update request manually.

To Recertify or Update a Position:

1. Select the ***Manager Self Service*** menu group.

2. Select the ***Tasks*** menu.

3. Select the ***Fill a Position Request*** component. The Fill a Position Request page is displayed.

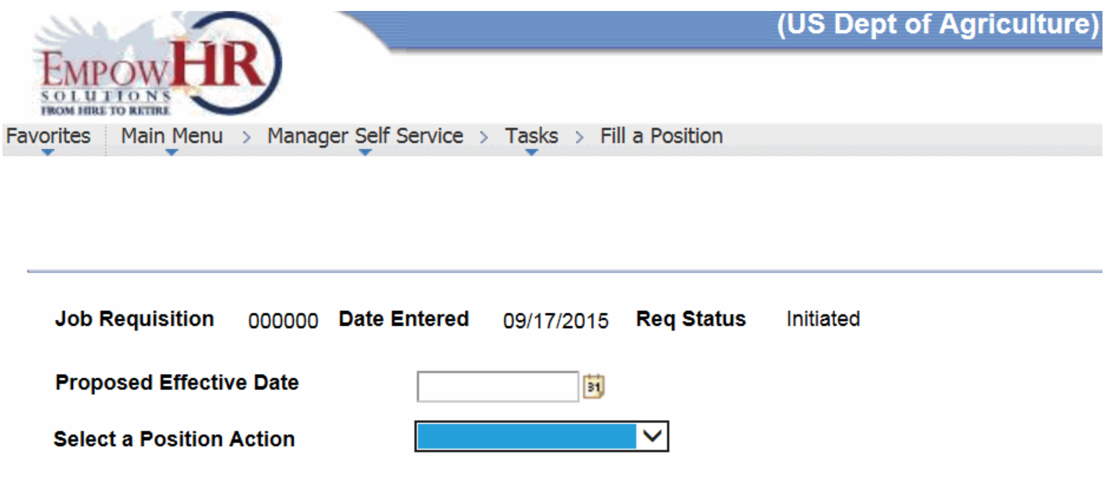


Figure 13: Fill a Position Page

4. Complete the fields as follows:

Field	Description/Instruction
Job Requisition	Populated with a unique identifier for this request.
Date Entered	Populated with the current date.
Req Status	Populated with the current status of the transaction.

Field	Description/Instruction
Proposed Effective Date	Enter the date the new position is to be effective or select a date by clicking the calendar icon.
Select a Position Action	Select **`Update`** from the drop-down list to update a position. If **`Update`** is selected, the Update/Re-Describe Classification Section is displayed. Select **`Recertify`** from the drop-down list to recertify a position. If **`Recertify`** is selected, the Recertify Classification Section appears.

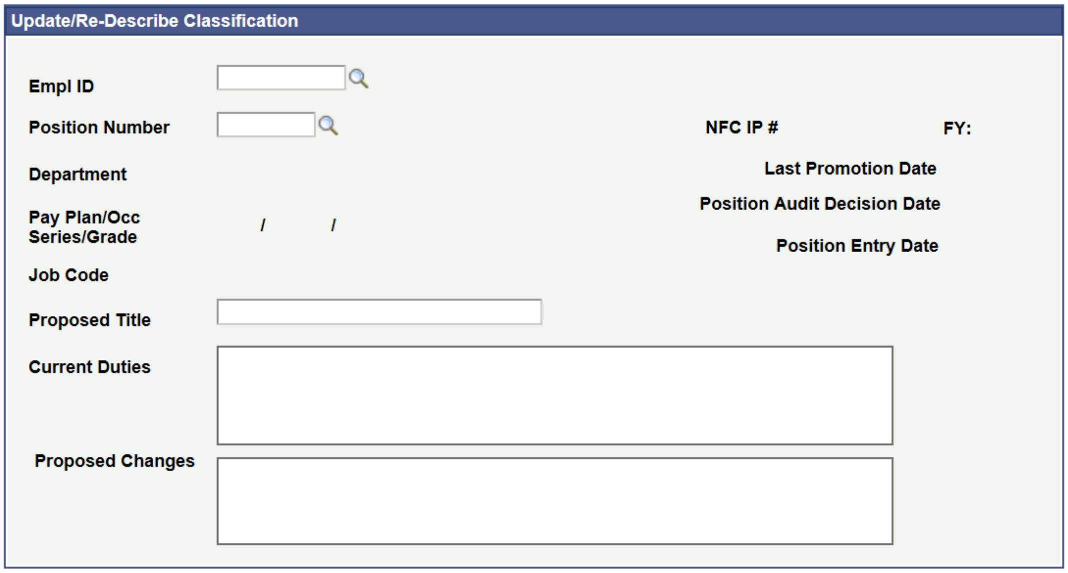


Figure 14: Fill a Position Page - Update/Re-Describe Classification Section

Field	Description/Instruction
Update/Re-Describe Classification	Displayed only if **`Update`** is selected from the Classification Action Drop-down list.
Position Number	Enter the position number or select a number by clicking the search icon. The description of the position number entered or selected will appear to the right of the field.
NFC IP #	Populated based on the position number entered or selected.
FY	Populated with the current fiscal year.
Department	Populated based on the position number entered or selected.
Last Promotion Date	Populated based on the position number entered or selected.
Pay Plan/Occ Series/Grade	Populated based on the position number entered or selected.
Position Audit Decision Date	Populated based on the position number entered or selected.
Job Code	Populated based on the position number entered or selected.

Field	Description/Instruction
Position Entry Date	Populated based on the position number entered or selected.
Proposed Title	Enter the new title of the position.
Current Duties	Populated based on the position number entered or selected.
Proposed Changes	Enter the changes to the position.

5. The Position Type, Outreach, Benefits, Justification, and Supervisory Certification sections are the same as those for a new position. To complete those fields, see ***Filling a New Position*** (on page 10).

6. Click **Submit** to submit the recertification/update position request for approval and processing. The Fill a Position Status page is displayed with the approval workflow at the bottom.

Note: If the request has a single approver, the approver's name will be displayed in the approver box. If the request has more than one approver, the approval box will display **`Multiple Approvers`**. The list of multiple approvers can be viewed by clicking the ***Multiple Approvers*** link.

Approving/Denying a Fill a Position Request

The request has been initiated and will now begin to go through the approval workflow. The approval workflow is determined by the Agency and each workflow can be any number of steps. The initiator is not considered a part of the workflow; therefore, the workflow begins with the first approver in the chain.

Each approver in the workflow will receive an email notification regarding a pending PAR. The approver can access the request by clicking the link provided in the email or through the ***Review Transactions*** component. For more information, see ***Approving/Denying Requests*** (on page 21).

Processing a New Position Request

Once a Fill a Position request reaches its last approver, it is the responsibility of the last approver to ensure that the position is processed.

If the request has an action of **`New`**, the position record will automatically be in an **`Approved`** status once the last approver clicks **Approve**. When **Approve** is clicked, the approver is redirected to the Position Management page which contains the information from the new position. The final approver must enter the remaining required fields for the position. Upon saving, the position is created and sent to NFC for processing. The position will reflect an **`NFC Ready`** status.

If the request has an action of **`Recertify`** or **`Update`**, the position record will not automatically be created. It is the responsibility of the final approver to manually create the position record or to notify the appropriate processor.

Review Transactions

Once a request is initiated by the manager, it must go through an approval workflow. The approval workflow is determined by the Agency. Since the initiator (manager) initiates the request, the manager is not considered a part of the workflow. The workflow begins with the first approver in the chain. The first approver in the chain has the option to approve or deny the transaction. Approving the request will move the request forward to the next approver in the workflow. Denying the request will cancel the request and all remaining approval workflow. The initiator will receive an email indicating that the request has been denied. The approval workflow also allows approvers to push back a request. The Pushback action will "push" the request back to the previous approver. The request will remain active and once reviewed and approved again, it will continue through the approval workflow process. Since the first approver is the initial step in the approval workflow, there is no option for that person to "push" the request back. If the request needs to be returned to the initiator, it should be denied with the reason documented in the comments. The initiator will then be required to submit a new request.

Once the request enters the approval workflow, no changes can be made to it. However, each approver is required to enter comments. These comments are workflow related and will not be displayed outside of the approval workflow.

For more information see:

Reviewing Transactions

To Review Transactions:

1. Select the ***Manager Self Service*** menu group.

2. Select the ***Review Transactions*** component. The Review Transactions page is displayed with the approver's transactions that are pending review.

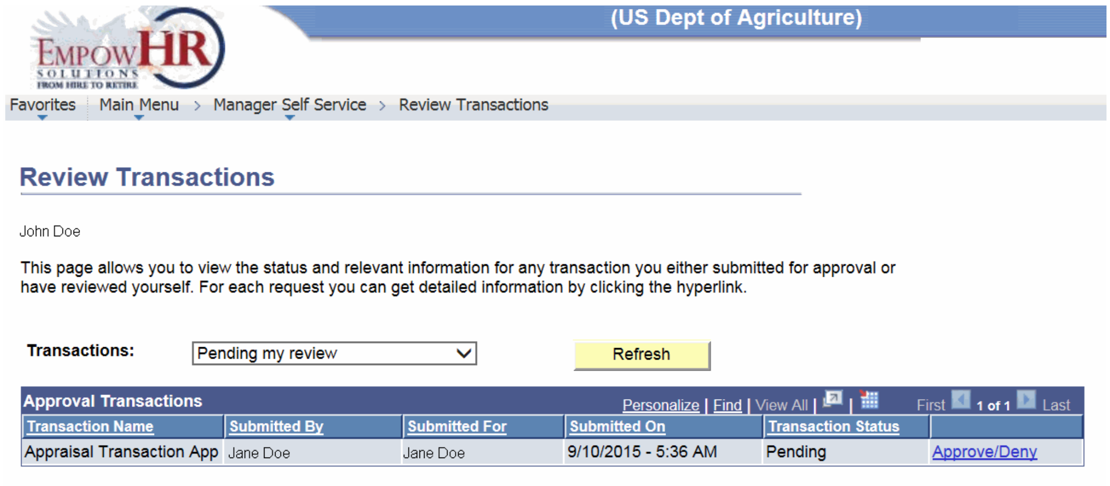


Figure 15: Review Transactions Page

At this point the following options are available:

Transaction Status	Description
Select **All**	Displays a list of all approval transactions.
Select **I have approved**	Displays a list of all approved transactions.
Select **I have denied**	Displays a list of all denied transactions.
Select **I have submitted**	Displays a list of all submitted transactions.
Select **Pending my review**	Displays a list of all transactions pending the manager's review.

3. Click **Refresh** to display the applicable information on the Review Transactions page.

Approving/Denying Requests

Once a request is initiated, it must go through the approval workflow. The approval workflow is determined by the Agency, and each workflow can be any number of steps. The initiator is not considered a part of the workflow; therefore, the workflow begins with the first approver in the chain.

Each approver in the workflow will receive an email notification regarding a pending PAR. The approver can access the request by clicking the link provided in the email or through the ***Review Transactions*** component.

To Approve/Deny Transactions:

1. Select the ***Manager Self Service*** menu group.

2. Select the ***Review Transactions*** component. The Review Transactions page is displayed with the approver's transactions that are pending the manager's review.

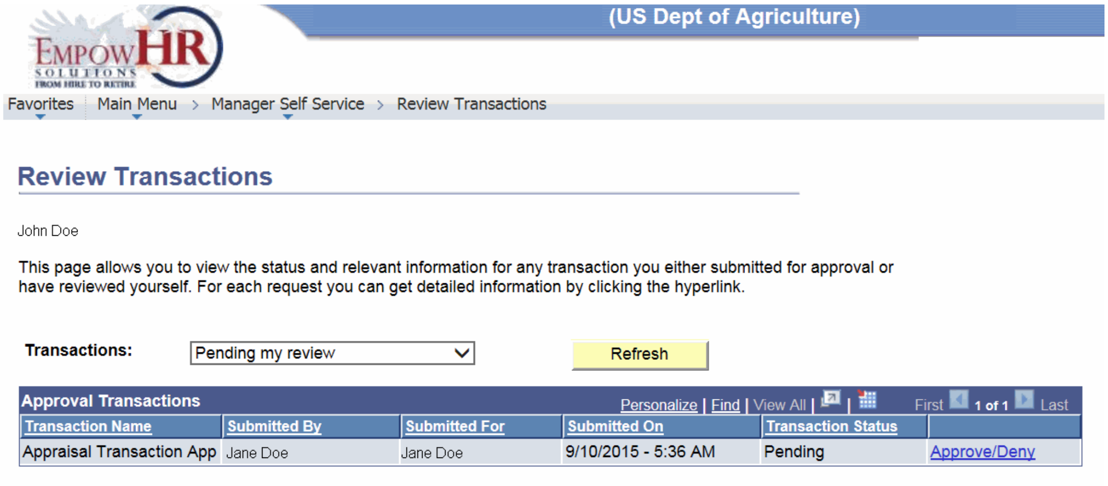


Figure 16: Review Transactions Page

3. Click the ***Approve/Deny*** link next to the applicable transaction. The View Approval Status Detail page is displayed for the selected transaction.

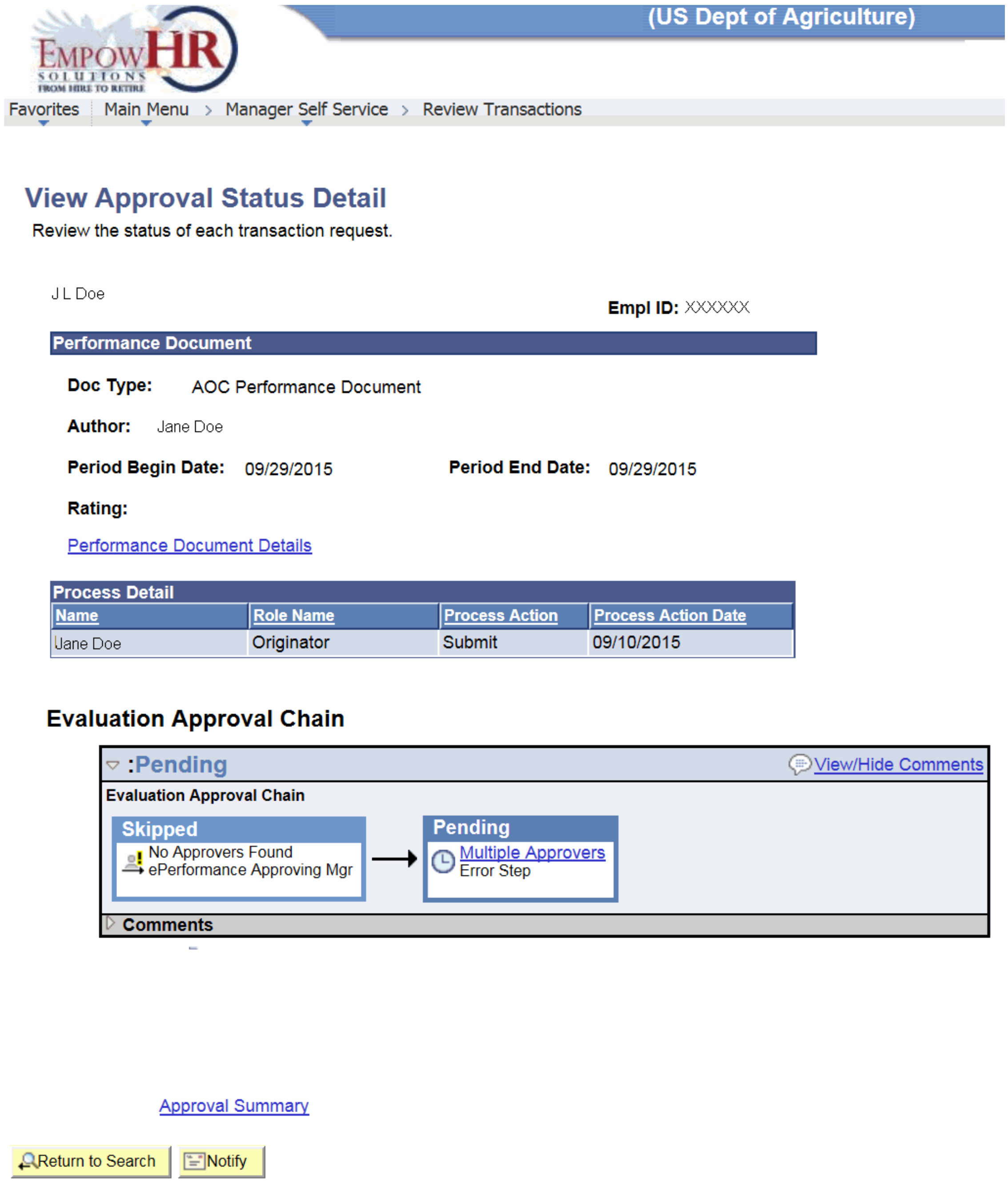


Figure 17: View Approval Status Detail Page

4. Complete the Comments field as follows:

Field	Instruction
Comments	Enter any applicable comments that pertain to the action being taken on

Field	Instruction
	the transaction. Note: Each approver in the workflow is required to enter comments before the transaction can move forward through the approval process.

After entering comments, the following options are available:

Step	Description
Click **Approve**	Approves the transaction and forwards it to the next step in the approval workflow.
Click **Deny**	Cancels the transaction and all remaining approval workflow steps.
Click **Pushback**	"Pushes" a transaction back to the previous approver for further review and approval. Note: The first approver in the workflow chain will not have the option to pushback a transaction since the first approver is the initial step in the workflow and there is no person to "push" the transaction back to.

Delegation

Delegation is when a person authorizes another to serve as his or her representative for a particular task of responsibility. The Manage Delegation component allows managers or approvers to authorize other users to perform managerial tasks on their behalf by delegating the authority to initiate or approve managerial transactions.

Delegation of authority to perform managerial transactions is usually prompted by one of these scenarios:

- A manager takes leave and wants to delegate authority or managerial transactions to another person while away from the office.
- A senior executive wants to delegate this authority to another person, such as an assistant.

The following terms are important to the understanding of the Delegation feature.

Term	Description
Delegation	Act of delegating one's authority to another user.
Delegator	Person that delegates authority to another user.
Proxy	Person granted authority to act on behalf of another user.

Term	Description
Delegate Initiation	Delegation framework allows the user to separate the tasks of initiating a transaction from approving the same transaction on someone's behalf. Delegator may delegate authority for a proxy to only initiate or submit a transaction on the delegator's behalf.
Delegate Approvals	Delegation framework allows the user to separate the task of initiating a transaction from approving the same transaction on someone's behalf. Delegator may delegate authority for a proxy to only approve or deny a transaction on the delegator's behalf.
Delegate Authority	Rights and privileges that are delegated from the delegator to the proxy.
Delegation Request	Request from the delegator to the proxy to task on delegated authority.
Delegation Period	Time range in which the delegated authority is in effect.
Delegation Administrator	Administrator responsible for configuring, managing, and maintaining delegated authorities.
Revoke	Delegator or delegation administrator withdraws delegated authority.

When a delegator/manager creates a delegation request, that delegator/manager can select a proxy from the list of direct reports and their subordinates or search for an individual. Although the delegator/manager can search for an individual, the search does not specify which employees have access to EmpowHR. It is the delegator/manager's responsibility to ensure that the proxy selected has the appropriate access in EmpowHR to perform the delegated tasks. After the delegator/manager creates the delegation request, the proxy is notified and has the ability to accept or deny the request. Once the proxy accepts the delegation request, he/she is immediately and automatically assigned the necessary roles and permissions to perform the delegated tasks.

If the delegator delegates the ability to initiate requests to the proxy, both the delegator and the accepted proxy will be able to initiate requests.

Delegation can be for any period of time whether fixed or indefinite. Once assigned a delegation, it can only be revoked two ways.

- Specified Time Period - a nightly batch process, run after 12:01 a.m., which will review and revoke any expired delegation requests.
- Manually Revoke a Delegation - a revocation which will immediately remove the roles and permissions from the proxy and restore the delegators responsibilities.

The Delegation framework supports the following types of delegation:

- Downward delegation of authority to a direct "reports to" or another person lower down in the reporting hierarchy.
- Upward delegation of authority to a manager or another person higher up in the reporting hierarchy.

- Lateral delegation of authority to a peer within the same division or in a different division within the reporting hierarchy.

Users can create delegation requests for selected transaction through Manager Self Service pages.

When creating a delegation request, the delegator can:

- Delegate only the transaction to which they have access. For example, an employee who is not a manager, does not have access to manager self service transactions and, therefore, cannot delegate manager-specific transactions.
- Delegate to only one proxy per delegation period per transaction.
- Delegate all transactions to a single proxy, or delegate different transaction to different proxies.

For more information see:

Assigning Delegation Approvals

To Assign a Delegation:

1. Select the ***Employee Self Service*** menu group.

2. Select the ***Manage Delegation*** component. The Manage Delegation page is displayed.

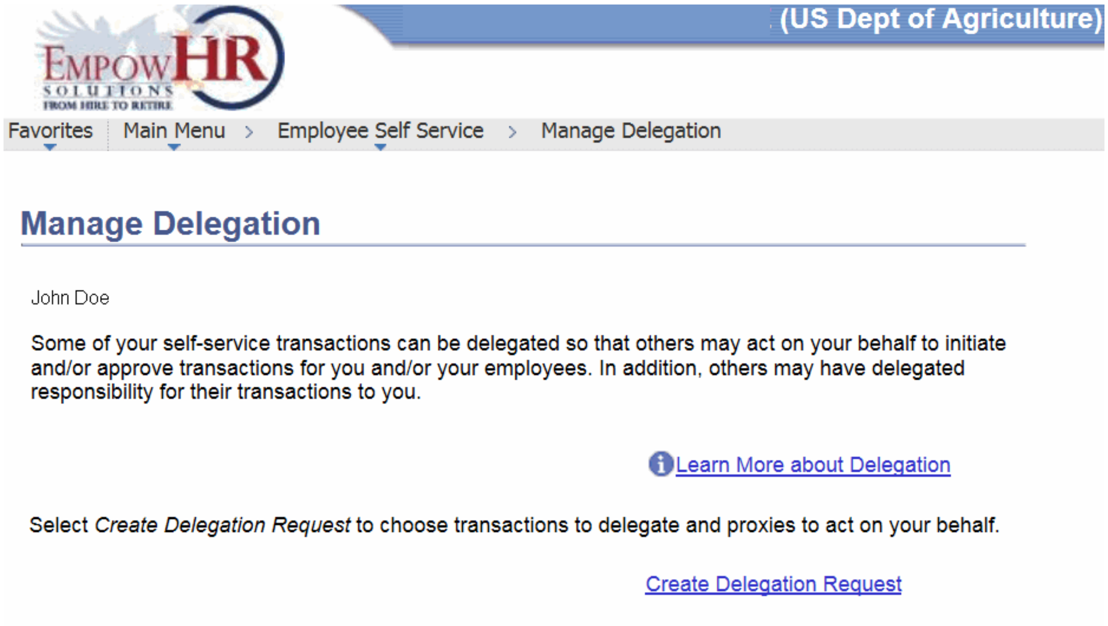


Figure 18: Manage Delegation Page

3. Click the ***Create Delegation Request*** link. The Create Delegation Request page is displayed.

Figure 19: Create Delegation Request Page

4. Complete the fields as follows:

Delegation Dates	Instruction
From Date	Enter the date on which the delegation will begin or select a date by clicking the calendar icon.
To Date	Enter the date on which the delegation will end or select a date by clicking the calendar icon.

5. Click **Next**. The Create Delegation Request - Select Transactions page is displayed.

   OR

   Click **Cancel** to cancel the action and return to the Manage Delegation page.

Figure 20: Create Delegation Request Page - Select Transactions

6. Complete the field as applicable:

Transactions	Instruction
Manager SS PARs Request	Check this box to delegate another user to approve/deny PARs.

At this point, the following options are available:

Step	Description
Click **Select All**	Selects all transactions.
Click **Clear All**	Deselects all transaction types.
Click **Next**	Advances to the Create Delegation Request - Select Proxy by Hierarchy page.
Click **Previous**	Returns to the Create Delegation Request - Enter Dates page.
Click **Cancel**	Cancels the action and returns to the Manage Delegation page.

7. After selecting the applicable proxy for which to assign delegation authority, the Create Delegation Request - Select Proxy by Hierachy page is displayed.

Figure 21: Create Delegation Request Page - Select Proxy by Hierarchy

8. Select the applicable name.

9. Click **Next**. The Create Delegation Request page - Delegation Detail is displayed.

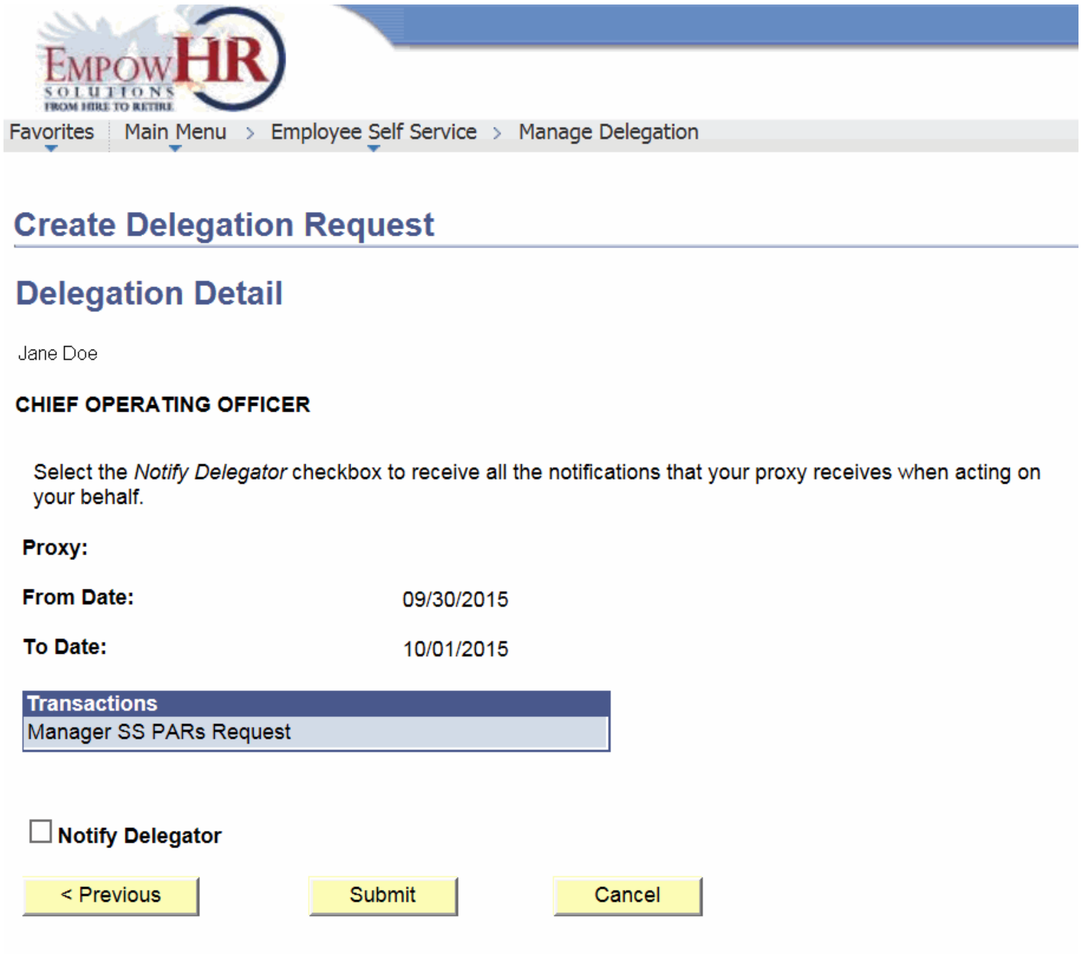


Figure 22: Create Delegation Request Page - Delegation Detail

10. Complete the Notify Delegator field, if applicable:

Field	Instruction
Notify Delegator	Check this box to send a copy of the delegated request to the delegator/manager.

11. Click **Previous**. You are returned to the Create Delegation Request - Select Transaction page.

OR

12. Click **Submit**. Create Delegation Request page (Successfully Submitted) is displayed.

OR

13. Click **Cancel**. You are returned to the Manage Delegation page.

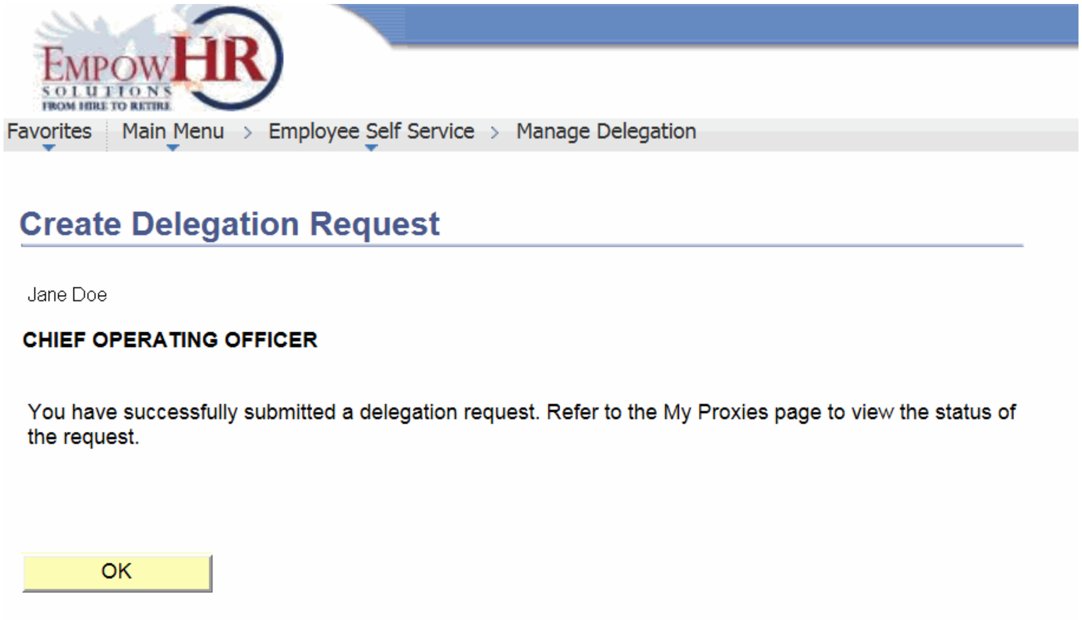


Figure 23: Create Delegation Request Page (Successfully Submitted)

14. Click **OK**.

Accepting a Delegation Request

A delegation request must be approved by the proxy before it becomes active. The proxy will receive an email to notify him/her that he/she has a delegation request. The proxy has the option to either navigate to the Manage Delegation page or click the link to access the page to accept the delegation request.

Note: This function is performed by the proxy.

To Accept a Delegation Request:

1. Select the ***Employee Self Service*** menu group.

2. Select the ***Manage Delegation*** component. The Manage Delegation page is displayed.

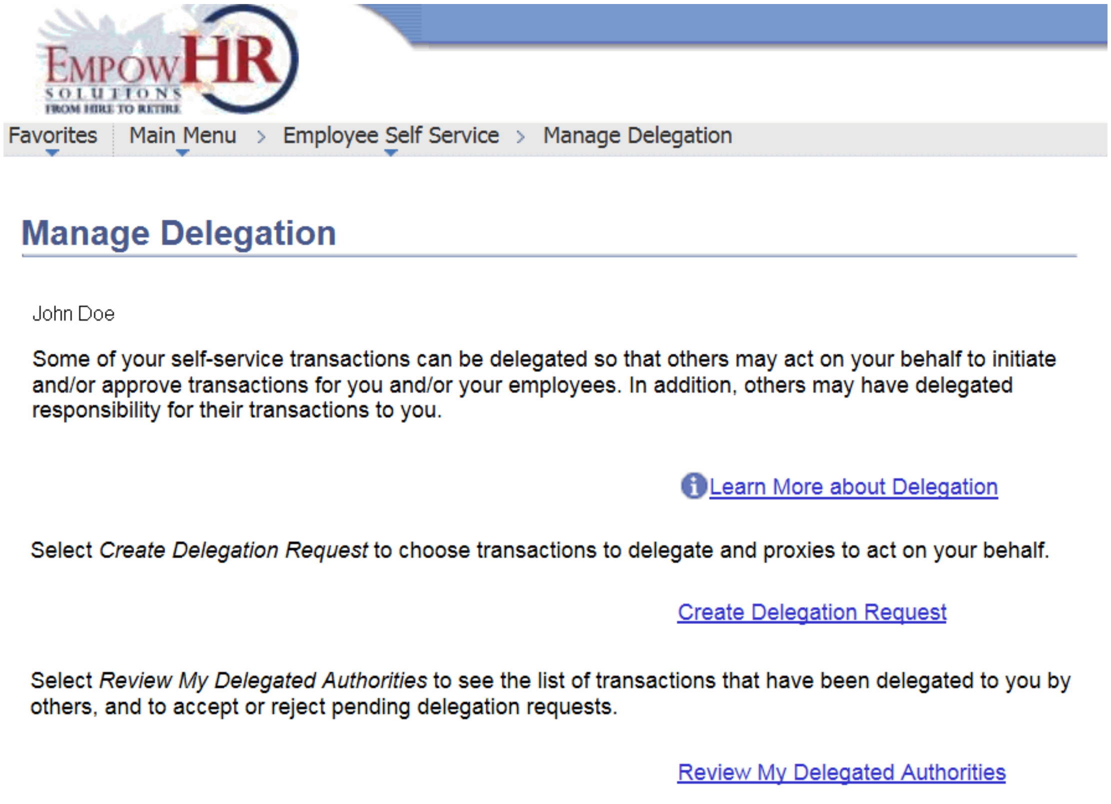


Figure 24: Manage Delegation Page

3. Click the ***Review My Delegated Authorities*** link. The My Delegated Authorities page is displayed. All delegation transactions for the user will be displayed on the page.

Note: The user can select the criteria filter to view request with a specific status by selecting an option from the drop-down list and clicking **Refresh**.

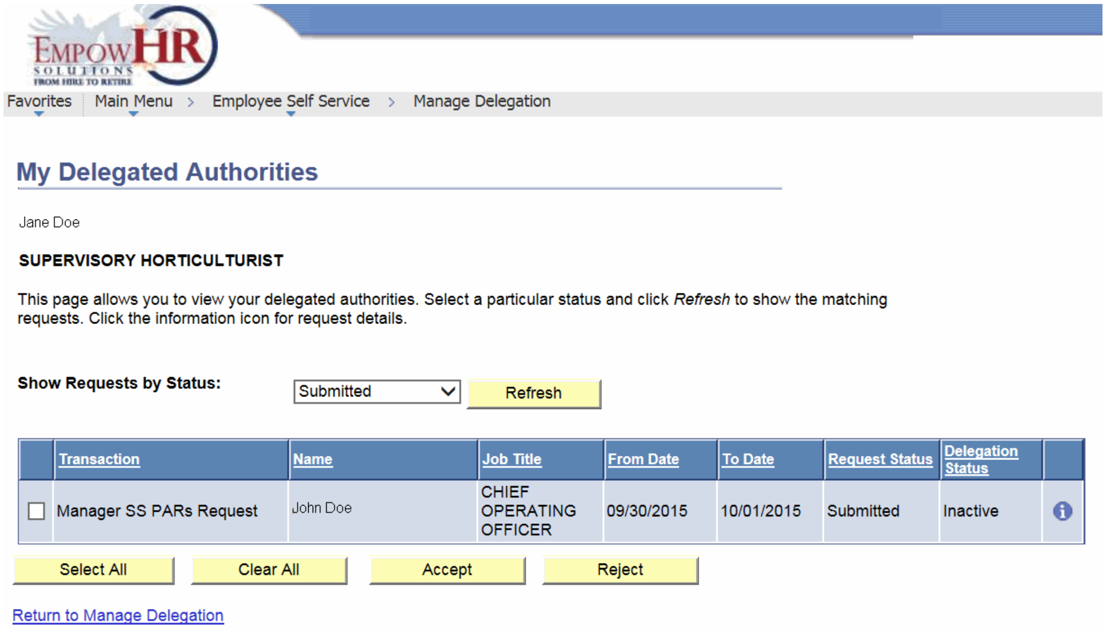


Figure 25: My Delegated Authorities Page

4. Select the applicable transaction from the list.

   OR

   Click **Select All** to select all transactions.

   OR

   Click **Clear All** to deselect all transactions.

5. Click **Accept** to accept the delegation of authority. The Accept Delegation Request page is displayed.

OR

Click **Reject** to deny the delegation of authority. The Reject Delegation Request page is displayed.

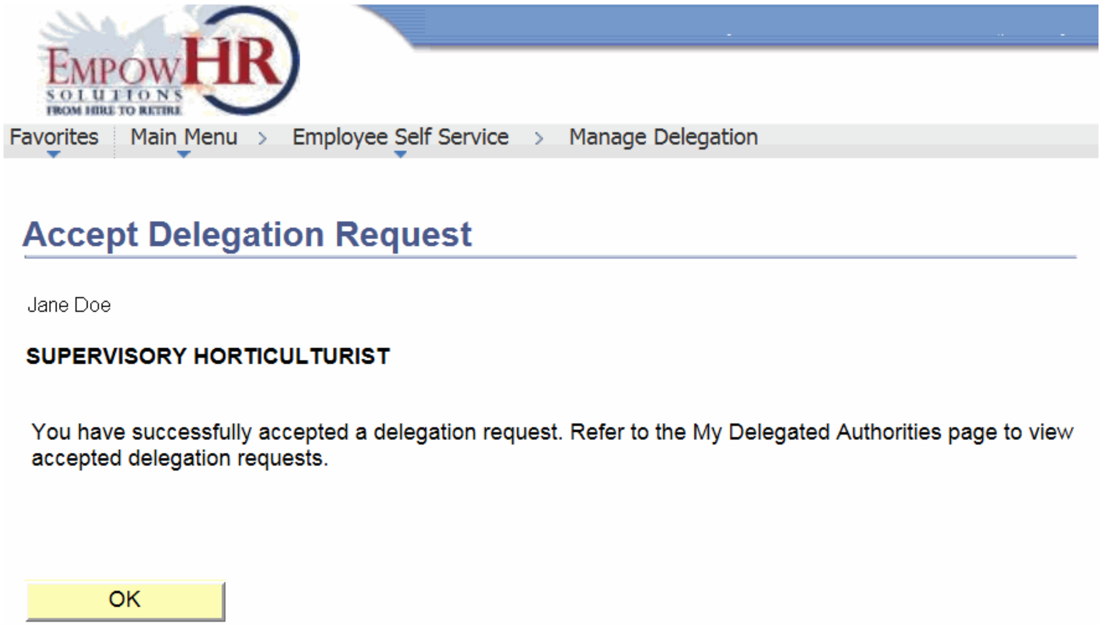


Figure 26: Accept Delegation Request Page

6. Click **OK**. The My Delegated Authorities page is displayed.

Revoking a Delegation

Once a delegation request is accepted by the proxy, the delegator/manager will still be able to review the transaction, but he/she will not be able to perform any approvals. The delegator/manager will have to either wait for the period of delegation to expire or he/she can revoke delegation authority.

To Revoke a Delegation:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Manage Delegation*** component. The Manage Delegation page is displayed.
3. Click the ***Review My Proxies*** link. The My Proxies page is displayed. All delegation requests for the delegator/manager will be displayed on the page.

Note: The user can select the criteria filter to view request with a specific status by selecting an option from the drop-down list and clicking **Refresh**.

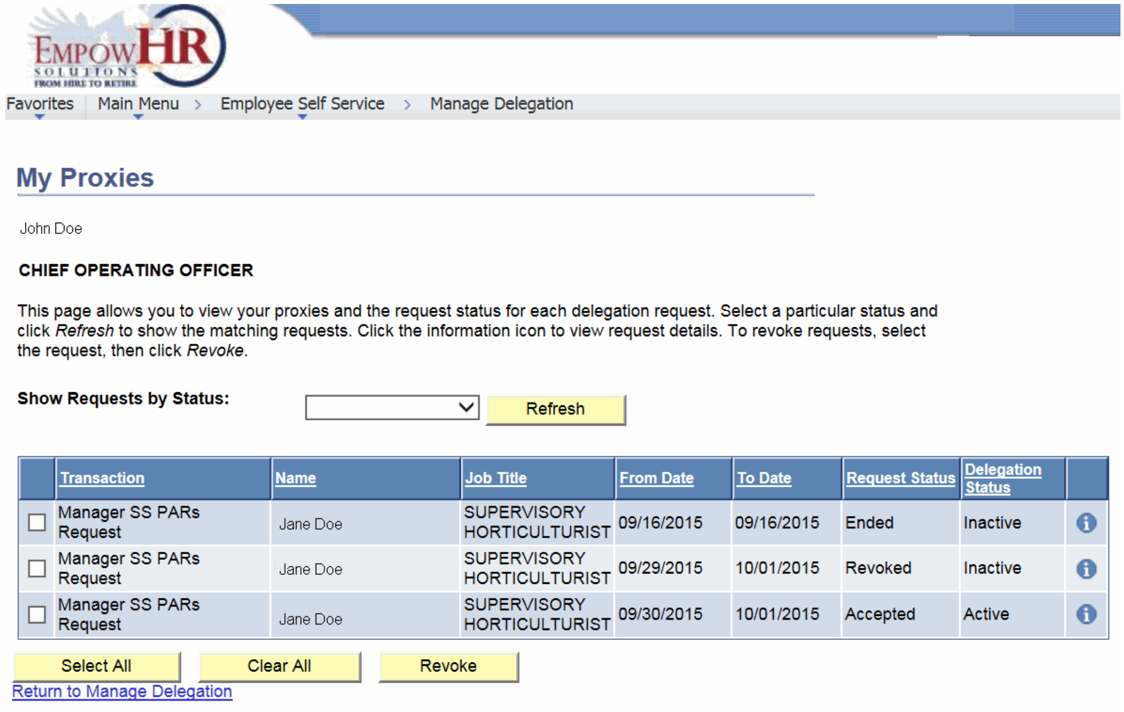


Figure 27: My Proxies Page

4. Select the applicable transaction from the list.

OR

Click **Select All** to select all transactions.

OR

Click **Clear All** to deselect all transactions.

5. Click **Revoke** to revoke the selected delegation authority. The Revoke Delegation Request page is displayed.

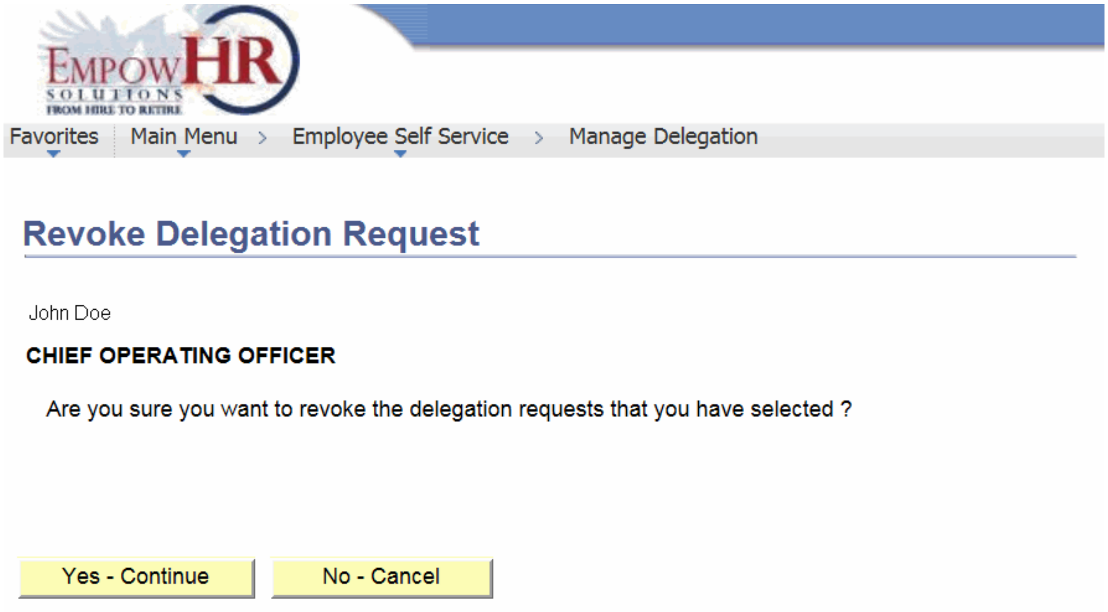


Figure 28: Revoke Delegation Request Page

6. Click **Yes - Continue** to revoke the selected delegation authority. The Revoke Delegation Request Confirmation page is displayed.

OR

Click **No - Cancel** to cancel the action and return to the My Proxies page.

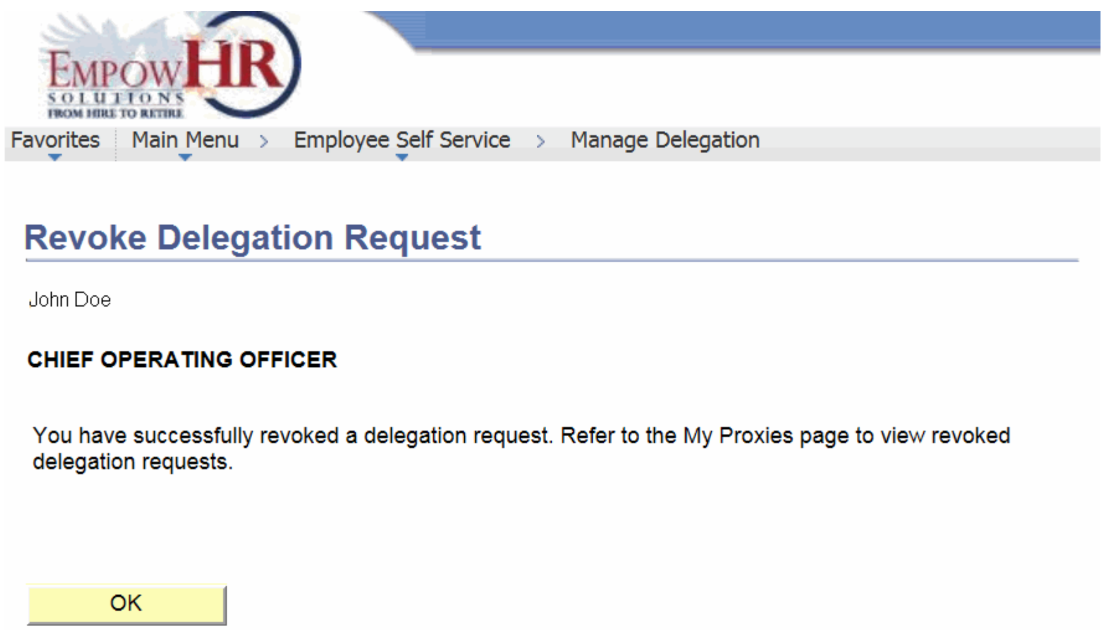


Figure 29: Revoke Delegation Request Confirmation Page

7. Click **OK**. The My Proxies page is displayed.

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