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## Introduction

Delegations are used to give someone else within your team permission to authorise requests or perform tasks on your behalf when you are absent. We recommend setting this feature up delegations as soon as you have manager access to MyView so that it is always in place when you are absent.

If you only want another person to approve a request on your behalf, you can use the **authorisation** feature. This feature is used for approving timesheets and leave and absence requests.

If you need another person to be able to submit a process on your behalf, such as a leaver or input an absence, you can use the **responsibilities** feature.

The authorisation and responsibilities features are separate and therefore granting a responsibility to submit on behalf of a staff member does not give authorisation (approval) rights.

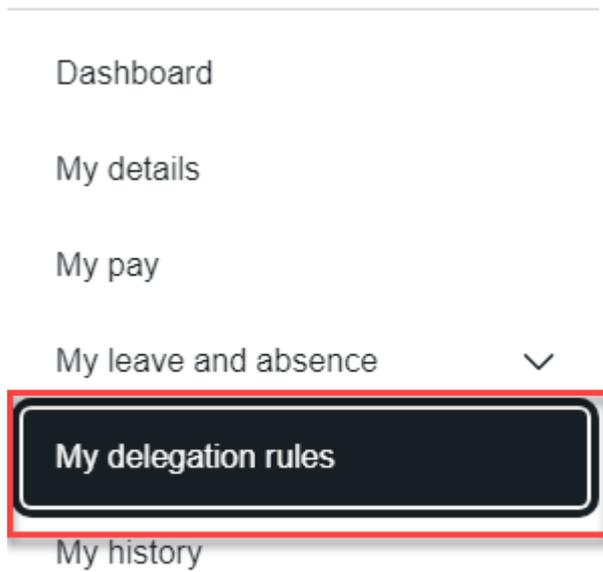
## Setting up a delegation

Using the **absence** tick box within the delegation screen allows you to be able to automatically delegate authorisations and responsibilities when you are shown as absent within MyView. We recommend setting this feature up at the outset.

Before setting up a delegation rules, it is your responsibility to have a conversation with the person you are assigning the delegation to, to ensure that they are aware of the responsibility and they are at an appropriate grade to take on this responsibility.

Assigning delegation for absences - can only work if the person assigning to is also a manager (has manager profile on MyView). If this needs to be modified please email [hrrsystems@rhul.ac.uk](mailto:hrrsystems@rhul.ac.uk).

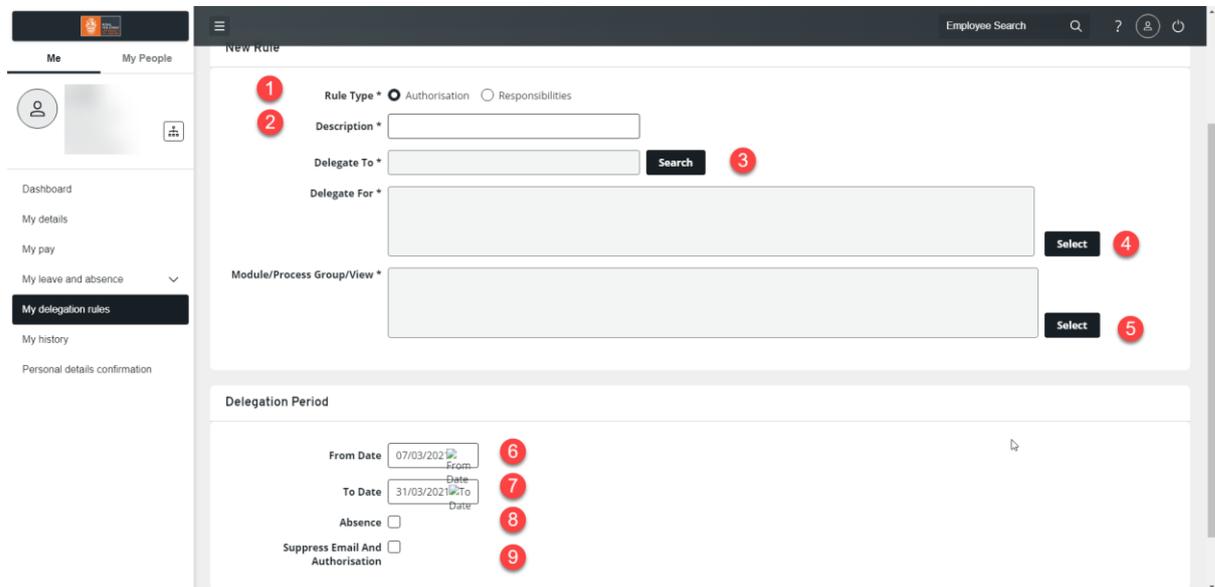
1. Click on the **My delegation rules** option in the menu to the left of the screen



2. Click on **Add New, Authorisations** and **responsibilities** both need to be set up.

### Setting up an authorisation

1. To set up **Authorisations** select **Authorisations**, add a **Description** for the delegation that you are setting up (e.g. Annual Leave delegation or Annual Leave and Timesheet delegation)



2. Click on **search** at the end of the **delegate to** field
3. Enter data in the relevant fields in order to search for the person you want to delegate to e.g. Surname, click on **search**. If you are unsure of a spelling of a forename, it is possible to just search by the surname.



## Delegation of Authorisation

### AdvancedSearch

Surname:

First Name:

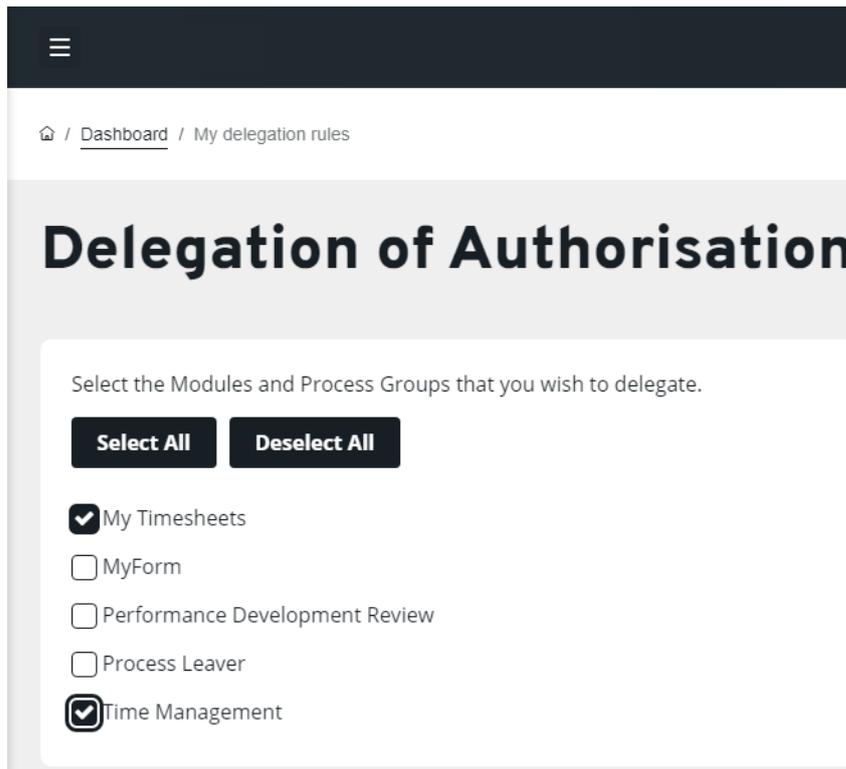
Known As:

Previous Surname:

Employee Number:

Direct Reports Only:

4. Once selected, the person's name will appear in the **delegate to** field
5. Click on **select** at the end of the **delegate for** field.
6. For **authorisations** delegations, this is to specify whose timesheets, holidays or absences the delegate has permission to authorise / reject.
7. A list of all staff who report to you will appear
8. You can select people individually or by selecting direct reports only or selecting the whole team.
9.  People Individually  Direct Reports  Whole Team
10. Clicking on **select all** will select everyone (including any staff who report in to people who directly report to you) or you can select people manually by clicking the tick box next to their name. To see lower levels of staff click on the **+** box.
11. **NOTE:** you cannot allow the delegate to authorise their own absence, you will need to deselect them before continuing.
12. **Select the Process/Module Group/View** , select **Time Management** and **My Timesheets**



13. In the Delegation Period section tick Absence. This will set a delegation to be in place for all periods that you are absent from the College.

Delegation Period

<b>From</b>	<input type="text" value="24/07/2020"/>	
<b>To</b>	<input type="text"/>	
<b>Absence</b>	<input checked="" type="checkbox"/>	
<b>Suppress Email And Authorisation</b>	<input type="checkbox"/>	

14. **Suppress authorisation & emails** will prevent authorisations being displayed in your MyView, and authorisation emails being sent to you for the duration of the delegation. It is recommended that this is not ticked, so that you have an audit trail of emails on your return to work.

### Setting up a responsibility

1. To set up **Responsibility** select **Responsibilities** add a **Description** for the responsibility that you are setting up (e.g Record sickness and PDR's on behalf)

# Delegation of Authorisation

**New Rule**

Rule Type \*  Authorisation  Responsibilities

Description \*

Delegate To \*  **Search**

Delegate For \*  **Select**

Module/Process Group/View \*  **Select**

2. Click on **search** at the end of the **delegate to** field
3. Enter data in the relevant fields in order to search for the person you want to delegate to e.g. Surname, click on **search**. If you are unsure of a spelling of a forename, it is possible to just search by the surname.

AdvancedSearch

Surname:

First Name:

Known As:

Previous Surname:

Employee Number:

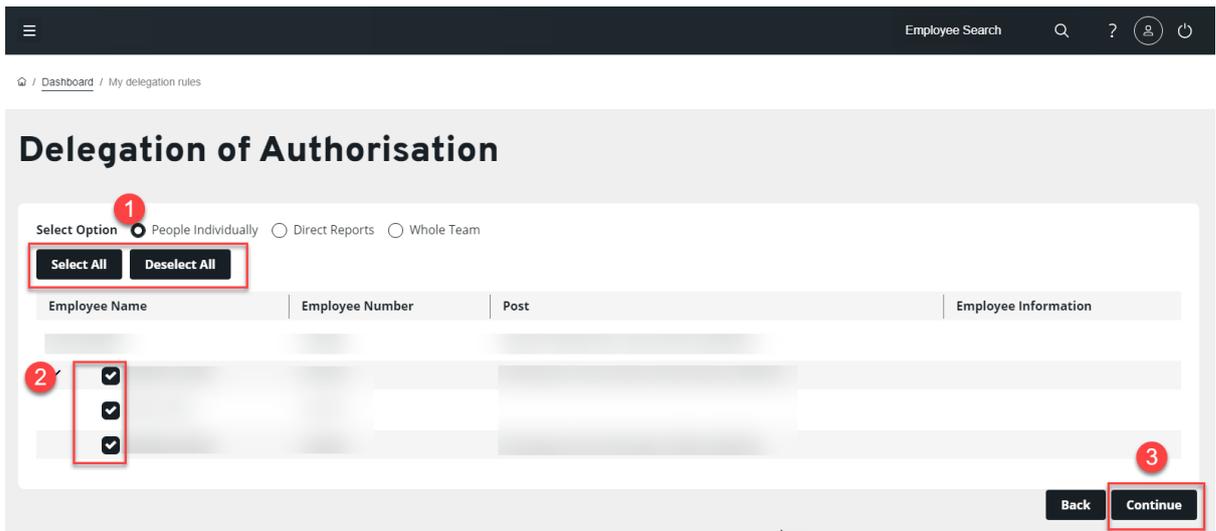
Direct Reports Only:

Select:  Name: NAME, STAFF-MEMBER Employee Number: 218949 Location: Huntersdale (Huntersdale)

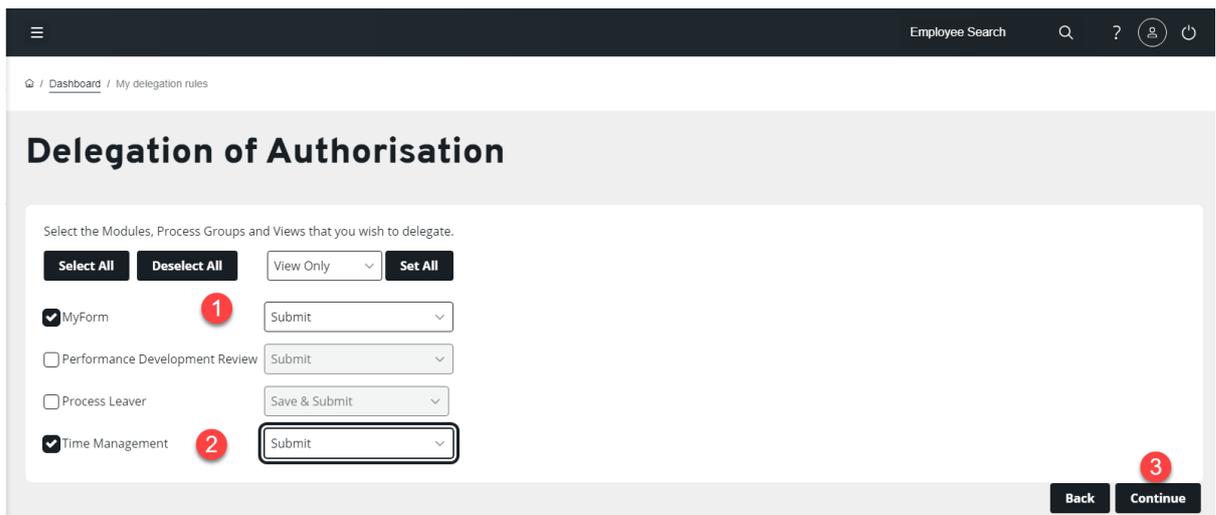
Please make your selection from the search results to [ Continue ], or amend the search criteria and perform a new [ Search ]

**Back Search Continue**

4. Once selected, the person's name will appear in the **delegate to** field
5. Click on **select** at the end of the **delegate for** field.
6. A list of all staff who report to you will appear
7. You can select people individually or by selecting direct reports only or selecting the whole team.
8.  People Individually  Direct Reports  Whole Team
9. Clicking on **select all** will select everyone (including any staff who report in to people who directly report to you) or you can select people manually by clicking the tick box next to their name. To see lower levels of staff click on the **+** box.



10. **NOTE:** you cannot allow the delegate to authorise their own absence, you will need to deselect them before continuing.
11. **Select the Process/Module Group/View, select Performance Development Review, and Time Management and select Submit for all.** (Do not select Process Leaver).



12. In the **Delegation Period** section tick **Absence**. This will set a delegation to be in place for all periods that you are absent from the College.

**Delegation Period**

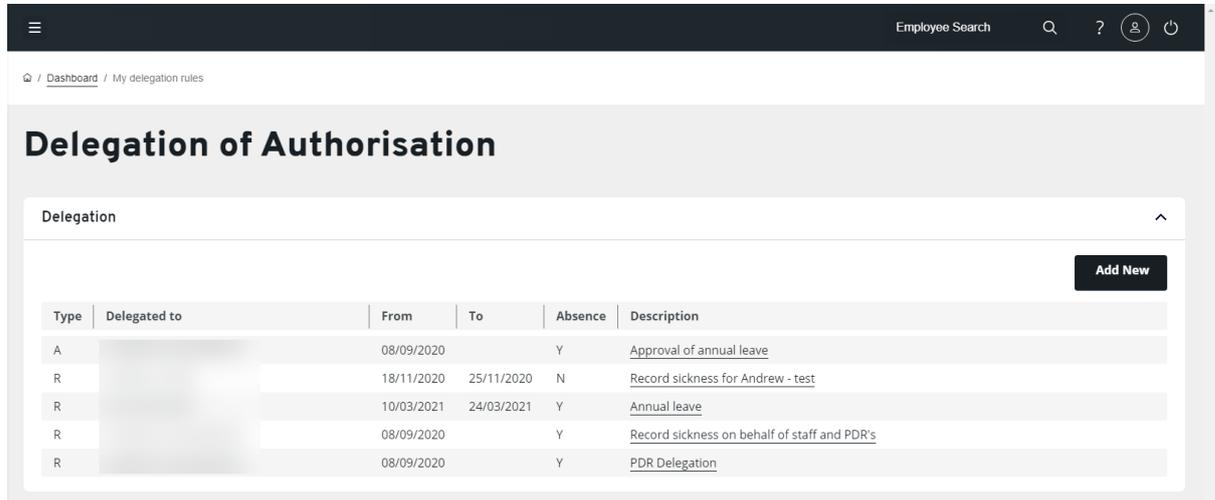
**From**

**To**

**Absence**

**Suppress Email And Authorisation**

13. **Suppress authorisation & emails** will prevent authorisations being displayed in your MyView, and authorisation emails being sent to you for the duration of the delegation. It is recommended that this is not ticked, so that you have an audit trail of emails on your return to work.
14. Click **submit**. You will receive a confirmation message saying that the delegation rules has been created – click on **continue**.
15. A summary of all of the delegations you have in place can be accessed from **My delegation rules**



### Delegated responsibilities

Once the rule has been set up, the member of staff who you have delegated the responsibility to will be able to see the delegation rules via the **delegation rules** module on MyView

1. When a holiday or absence request is submitted in the time period covered by the delegation rules, an email will now be sent to the delegated authoriser and yourself.
2. You can click through under **delegation rules** to find out more about the details of the rule and who you may be receiving authorisations for.

You do not need to do anything at the end of the delegation period. The rule will automatically cease.

### Editing and deleting a delegation rule.

To edit an existing delegation rule, click on **My delegation rules** and select the delegation rule you wish to amend or delete.

Employee Search

Dashboard / My delegation rules

## Delegation of Authorisation

Delegation ^

**Add New**

Type	Delegated to	From	To	Absence	Description <span>1</span>
A		08/09/2020		Y	Approval of annual leave
R		18/11/2020	25/11/2020	N	Record sickness for Andrew - test
R		10/03/2021	24/03/2021	Y	Annual leave
R		08/09/2020		Y	Record sickness on behalf of staff and PDR's
R		08/09/2020		Y	PDR Delegation

Click **edit**. This will allow you to modify all the details of the delegation rule that you originally created. Please refer to [setting up a delegation](#) in this document for guidance on what should be changed and what each feature means. Once the changes have been made, click **submit** to enact the revised delegation. Alternatively, click **delete** to delete the delegation rule.

Employee Search

### Edit Delegation

Rule Type  Authorisation  Responsibilities

Description \*

Delegate To

Delegate For \*

Module/Process Group/View \*

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### Delegation Period

From

To

Absence

Suppress Email And Authorisation

**Back** **Edit** 1