Manage Delegations - Delegator

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Overview

Peoplesoft Fluid Delegations offer users the power to initiate or authorize a PeopleSoft transaction by making someone else operate on their behalf. HCM transactions are incorporated through a step by step guided activity. See steps below to create a delegation request.

PeopleSoft Fluid Delegations is usually prompted by one of these scenarios:

- A manager takes leave and wants to delegate authority of managerial transactions to another person while away from the office.

- A senior executive does not have the time to process transactions and wants to delegate this authority to another person, such as an assistant.

Delegation Terminology

Delegation The act of delegating one's authority to another user.

Delegator A person that delegates authority to another user.

Proxy/Delegate A person granted authority to act on behalf of another user.

Requests Statuses and Delegation Statuses

Request Status	Delegation Status	Description
Submitted	Inactive	When a delegator creates a new delegation request the system sets the request status to Submitted and delegation status to Inactive.
Accepted	Active	When a proxy accepts a delegation request, the system sets the request status to Accepted. The delegation status becomes Active only when the following two conditions occur: • The proxy accepts the delegation request. • The system date is greater than or equal to the From Date and less than or equal to the To Date of the delegation period.
Accepted	Inactive	If the proxy accepts the delegation request but the delegation request is future-dated, the delegation status remains Inactive until the system date is greater than or equal to the From Date.
Rejected	Inactive	When a proxy rejects a delegation request, the system sets the request status to Rejected. The delegation status remains Inactive.
Ended	Inactive	When the delegation authority period for the proxy expires, the system sets the request status to Ended and changes the delegation status to Inactive. This change occurs when the

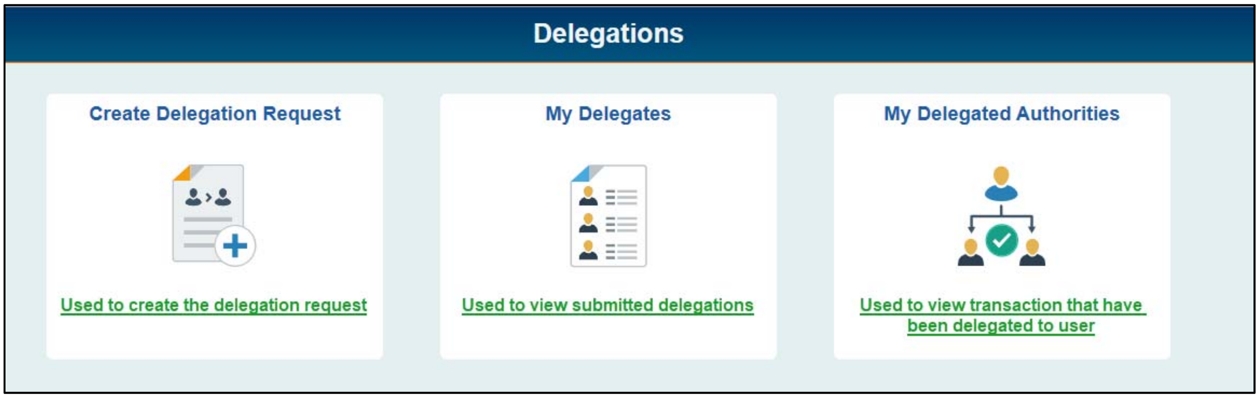
		system date is greater than the To Date of the delegation authority period. The system reassigns all pending transactions from the proxy to the delegator. The system also removes the proxy's temporary permission list and role, which removes the proxy's navigation access to the online transaction.
Revoked	Inactive	When the delegator revokes a delegation request, or the delegation administrator revokes the delegation request on behalf of the delegator, the system sets the request status to Revoked and changes the delegation status to Inactive. The system reassigns all pending transactions from the proxy to the delegator. The system also removes the proxy's temporary permission list and role, which removes the proxy's navigation access to the online transaction.

How to Use PeopleSoft Fluid Delegations

Delegations can be easily accessed through the **Delegations** tile.

- Because this is a shared tile between **Employee Self Service** & **Manager Self Service**, if you have it in Employee Self Service it will also show in Manager Self Service and visa-versa.

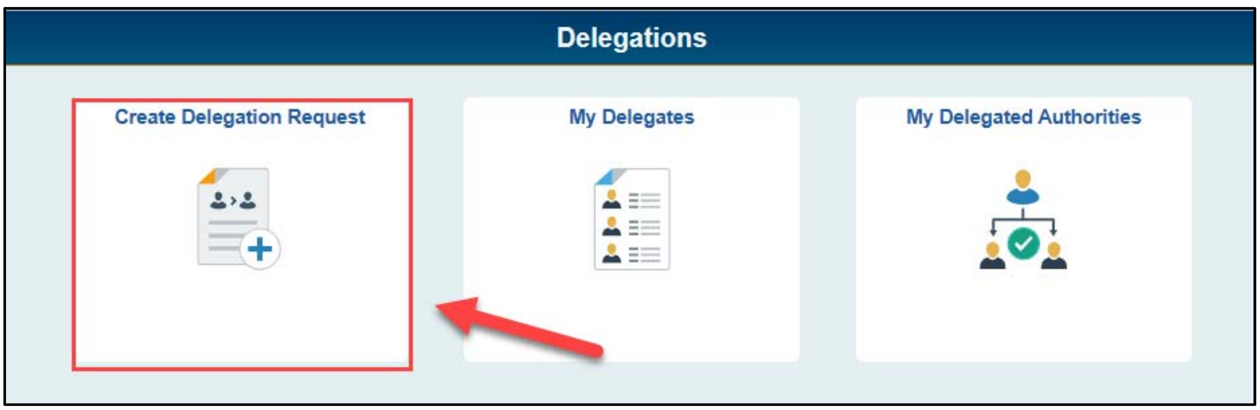
The **Delegations** dashboard contains three tiles to create and manage delegations from one single place.



Step 1 of 5 – Create Delegation Request

Select Create Delegation Request to begin delegation request.

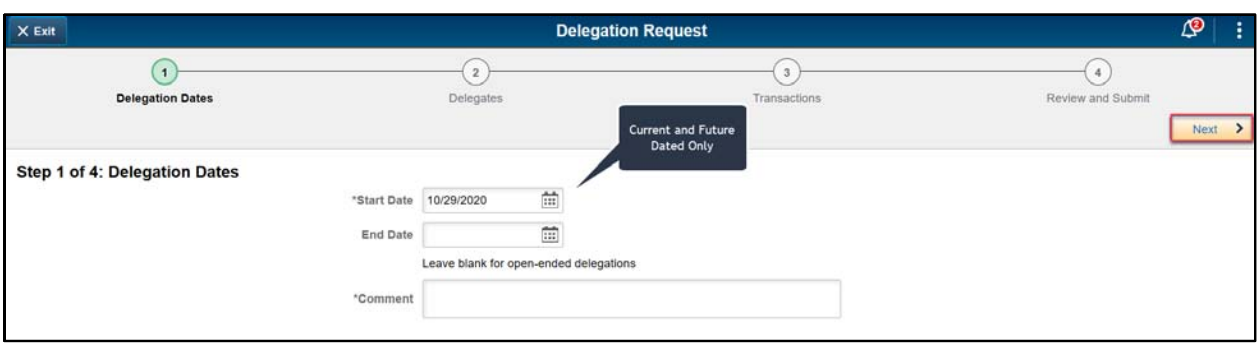
New path: *HRMS > Enterprise Components > Delegations > Create Delegation Request*



Step 2 of 5 – Delegation Dates

Start the creation of a delegation request by entering the **Start Date**, **End Date** and a statement on the delegation. Note, that the request **Start Date** cannot be backdated, however any pending approvals the delegator has in their queue from back dates will automatically be transferred to the proxy.

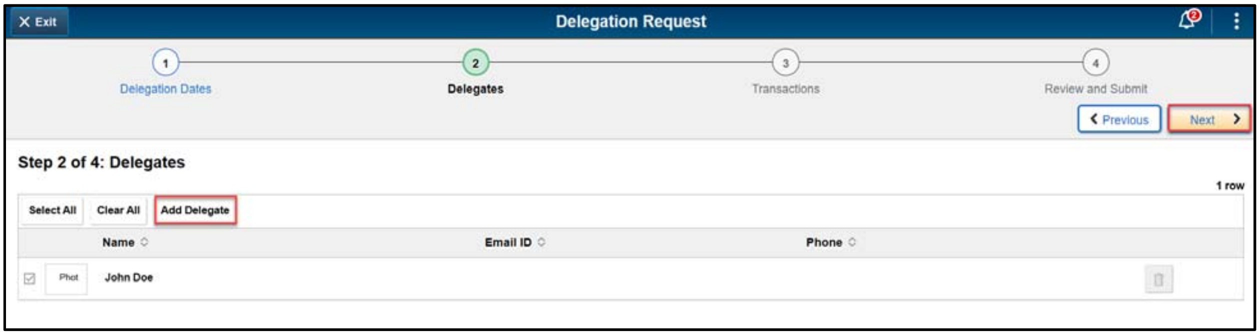
You do not need to enter an **End Date** for open-ended delegations. Select **Next** to select delegates.



Step 3 of 5 – Delegates

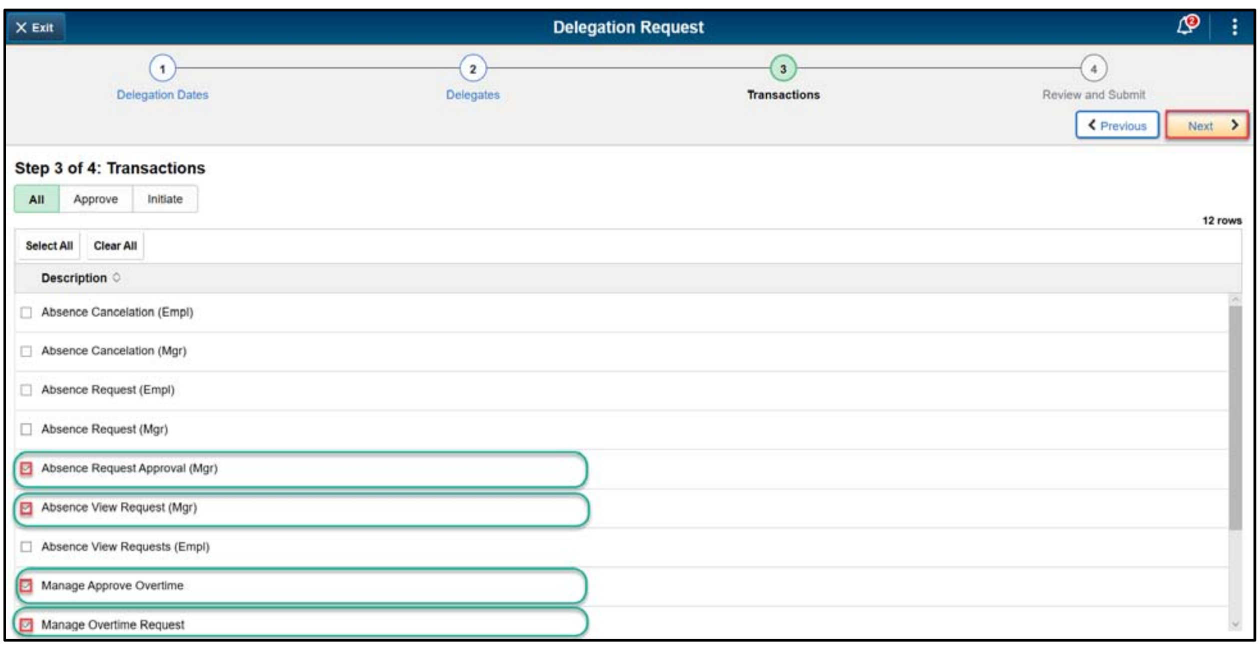
Select your delegate. Hierarchy will be tied to the delegators position tree. One or more delegates may be selected from the list.

If the list of delegates does not include the person you want to delegate to, you may **Add** a delegate. Select **Next** to select transaction(s).



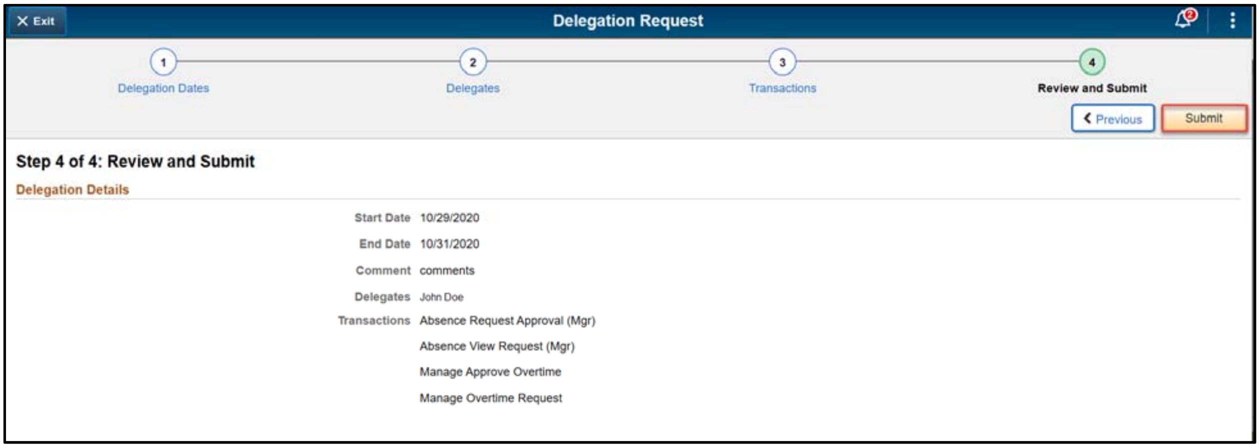
Step 4 of 5 – Transactions

Next, select the **Transaction**(s) to delegate. Filter the transactions using Approvals or Initiate Transactions tabs. Only the transactions geared to delegator access will appear in the list. Select **Next** to review and submit.



Step 5 of 5 – Review and Submit

Review the delegates and transactions before you **Submit**.


Exit
Delegation Request
1
Delegation Dates
2
Delegates
3
Transactions
4
Review and Submit
Previous
Submit
Step 4 of 4: Review and Submit
Delegation Details
Start Date 10/29/2020
End Date 10/31/2020
Comment comments
Delegates John Doe
Transactions Absence Request Approval (Mgr)
Absence View Request (Mgr)
Manage Approve Overtime
Manage Overtime Request