

THE UNIVERSITY of TEXAS SYSTEM FOURTEEN INSTITUTIONS. UNLIMITED POSSIBILITIES. Office of Shared Information Services

# Manage Delegations- Delegate

# Table of Contents

Over new	· · · · · · · · · · · · · · · · · · ·
How to Use PeopleSoft Fluid Delegations	3
Step 1 of 4 – My Delegated Authorities	4
Step 2 of 4 – Accept or Reject	4
Step 3 of 4 – Confirm	4
Step 4 of 4 – Accepted Status	5

## 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 approve/reject a delegation request routed to you.

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	<b>Delegation Status</b>	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 vice-versa.

Test Disconnects of Taxas Sectors		✓ Manager Se	elf Service	1	ଜ	Q	ø	:	$\otimes$
	Financial Approvals	HRMS Approvals	Delegations	My Team					
	Team Time and Attendance	Open Jobs	Recruiting Activities	Team Performance					

#### Step 1 of 4 – My Delegated Authorities

Select the **My Delegated Authorities** tile to review delegated transactions. Delegation alerts will automatically be routed and may be found under the Notifications

**New path:** *HRMS > Enterprise Components > Delegations > My Delegated Authorities* 

	Delegations	
Create Delegation Request	My Delegates	My Delegated Authorities
2>2		÷
+		



#### Step 2 of 4 – Accept or Reject

On the Submitted tab, the option to either **Accept** or **Reject** the delegation will be available. Click on transaction and choose action.

< Delegat	ions					My Delegated Auth	orities	ඛ	٩	۵	1	0
Active	Accepted	Ended	Rejected	Revoked	Submitted							
Accept	Reject											14
Tra	ansactions					Delegator	Start Date / End Date	Request Status				
Π	Reported Time					John Doe Smith	10/19/2020 10/23/2020	Submitted				>

# Step 3 of 4 – Confirm

Select Yes to confirm.

< Delegations	My Delegated Authorities		<u>ନ</u> ଦ		0
Active Accepted Ended Rejected Revoked Submitted					
Accept Reject					15:
Transactions	Delegator	Start Date / End Date	Request Status		
TL Reported Time	Are you sure you want to accept the selected delegations?	10/19/2020 10/23/2020	Submitted		>
C Delegations	My Delegated Authorities		۵ C	ર 🖉	Ø
	Delegation request accepted				×



### Step 4 of 4 – Accepted Status

Next, the transaction(s) will be displayed under the **Accepted/Active** tab.

< Delegati	ions					My Delegated Authorities		ଜ	Q	ø	Ŧ	0
Active	Accepted	Ended	Rejected	Revoked	Submitted							
Accept	Reject											14
Tra	ansactions					Delegator	Start Date / End Date	Request Status				
= π.	. Reported Time					John Doe Smith	10/19/2020 10/23/2020	Accepted				>

• The delegator's report to employee will be displayed the routed approval.

	•								Timesheet	
imesheet										
					Employ	ee ID	FTE 1.000000			
Sr Business Ar	nalyst				Empl Re	cord 0	Empl Type Salaried			
Manager Nar	me John I	Doe Smith			Emplo	Class Classified				Timesheet
Actions -					Earliest Change	Date 09/01/2020	FLSA Exempt Status			Approval Monitor
Select Anor	ther Times	heet								Reported Time
		- Ulask			4	Desuisue Mark Mart 15	hak			Reported Time Approval for WRKS on 2020-10-19:Pending
	*VH	iew By		<u> </u>		PIEVIOUS VIEEK INEXT VI	CCA			Reported Time/Absence
		*Date 10/19/2020	• # •			Print Timesheet Punch	Timesheet			Pending for Doe, John
			Rep	ported Hours 40.00						<ul> <li>Penerted Time Approval for WPKS on 2020 10 20-Dending</li> </ul>
										Reported Time Approval for WRKS on 2020-10-20. Pending Reported TimeAbsence
om Monday	10/10/2020	to Sunday 10/2	5/2020 (2)							Pending
onimonuay	Mon 10/19	Tue 10/20	W 10	Ved T	hu Fri 122 10/23	Sat 10/24	Sun 10/25	Total	Time Reporting Code	TLByPosMymi
	10/10	TOLEO				10121	TOTES			Reported Time Approval for WRKS on 2020-10-21:Pending
	8.00	8.00	8	.00 8.1	00.8			40.00	WRKS - Salaried Worke	Repond Time Absence
										( crossing
		_								C TLByPostAges
Sul	ıbmit									TubyPowner     To Dee, John     To
Sul	ibmit									TibyPastager     Tor Doe, John     Tor Doe,
Sul	ibmit Time Status	Summary	Leave / Compe	ensatory Time Ab	sence <u>Exceptions</u>	Payable Time				ThibAnstyre Ter Dos.John     Reported Time Approval for WRKS on 2020-10-22:Pending     Report Breakerse      Prending     To Dos.John
Sul Reported T	ibmit Time Status	<u>Summary</u>	Leave / Compe	ensatory Time	sence <u>Exceptions</u>	Payable Time				TL:Drividges Tor Dos, John     Reported Time Approval for WRKS on 2020-10-22:Pending Reported TimeJabance Pending     T.:Drividges     Tor Dos, John
Sul Reported T	ibmit Time Status ve Status	Summary	Leave / Compo	ensatory Time	sence <u>E</u> xceptions	Payable Time				Ti.th/hostspec     Tor Doe, John     Tor Doe, John     Reported Time Approval for WRKS on 2020-10-22:Pending     Reported TimeAbases     Ti.th/hostspec     Tor Doe, John     Reported Time Approval for WRKS on 2020-10-23:Pending
Sul Reported T sported Time	ibmit Time Status Ie Status	Summary	Leave / Compo	ensatory Time	sence <u>E</u> xceptions	Payable Time		1-5 of 5	z	TLB-Protect Time Approval for WRKS on 2020-10-22:Pending     Report Time Approval for WRKS on 2020-10-22:Pending     TLB-Protect Time Approval for WRKS on 2020-10-23:Pending     Reported TimeApproval for WRKS on 2020-10-23:Pending     Reported TimeApproval for WRKS on 2020-10-23:Pending
Reported 1	ibmit Time Status ve Status	Summary	Leave / Compo	ensatory Time	sence <u>Exceptions</u>	Payable Time		1-5 of 5 🗸	2	TL:Drivitype: Reported Time Approval for WRKS on 2020-10-22:Pending Reported Time Approval for WRKS on 2020-10-22:Pending Reported Time Approval for WRKS on 2020-10-23:Pending Reported Time Approval for URKS on 2020-10-23:Pending
Su Reported 1 Ported Time	time Status e Status Reported	Summary	Leave / Compo	ensatory Time	Exceptions	Payable Time	Add Comments	1-5 of 5 🗸	×	Think-Instances     Reported Time Approval for WRKS on 2020-10-22:Pending     Reported Time Approval for WRKS on 2020-10-23:Pending     Think-Instances     Pending     To Doe, John     Pending     To Doe, John     O Think-Instances
Su Reported 1 sported Time	ibmit Time Status e Status Reported	Summary	Leave / Compr Total	ensatory Time	Description	<u>P</u> ayable Time	Add Comments	1.5 of 5 💊		TLB-Protection     Ter Doe, John     Reported Time Approval for WRKS on 2020-10-22:Pending     Top Providing     Top Doe, John     Top Providing     Top Doe, John     To
Reported 1 ported Time Q ate 2/19/2020	Time Status e Status Reported Needs App	summary I Status	Leave / Compr Total	TRC WRKS	Exceptions Exception Description Salaried Worked	Payable Time	Add Comments	1.5 of 5 💊		TL:D/butkper     For Doe, John     Reported Time Approval for WRKS on 2020-10-22:Pending     TL:D/butkper     For Doe, John     TL:D/butkper
Su Reported 1 sported Time ate	Itime Status Itime Status Reported Needs App	Summary	Leave / Competition	TRC WRKS	Exceptions  Exception  Salaried Worked  Submit of Monked	<u>P</u> ayable Time	Add Comments	1.5 of 5 💊	2	Tubhouteges     Reported Time Approval for WRKS on 2020-10-22:Pending     Reported Time Approval     To Doe, John     To Doe, John     Reported Time Approval for WRKS on 2020-10-23:Pending     Reported Time Approval for WRKS on 2020-10-23:Pending     To Doe, John     Reported Timesheet
Su Reported 1 sported Time III Q ute D/19/2020 D/20/2020	Ibmit Time Status Ie Status Reported Needs App Needs App	s Summary I Status iproval	Leave / Compo Total 8.00	nsatory Time	Salaried Worked	<u>P</u> ayable Time	Add Comments	1.5 of 5 N		TLB-Produces     Ter Dok. John     Reported Time Approval for WRKS on 2020-10-22:Pending     Reports Translations     Ter Dok. John     TER Dok. John
Su Reported 1 ported 1 ported 1 ported 1 ported 2 ported 2	Time Status e Status Reported Needs App Needs App Needs App	s Status Status proval proval	Leave / Compo Total 8.00 8.00	TRC WRKS WRKS WRKS	Exceptions Exceptions Description Salaried Worked Salaried Worked	Payable Time	Add Comments	1-5 of 5 N		Tub/hottper     Reported Time Approval for WRKS on 2020-10-22:Pending     Report ImeAbases     Pending     Tub/hottper     To Doe.John     Reports TimeAbases     Pending     Tub/hottper     for Doe.John     Tub/hottper     for Doe.John     Reports TimeAbases     Pending     Tub/hottper     for Doe.John     Reports TimeAbases     Pending     Tub/hottper     for Doe.John     Reports     Reports     for Doe.John     Report     for Doe.John     Report     for Doe.John     Report     for Doe.John     Report     for Doe.John     for Doe.Jo
Su Reported 1 ported Time P Q ute 0/19/2020 1/20/2020 1/21/2020 1/22/2020	Ibmit Time Status E Status Reported Needs App Needs App Needs App Needs App Needs App	s Summary Summary I Status proval proval proval proval	Leave / Compt	TRC WRKS WRKS WRKS WRKS	Exceptions Exceptions Esception Esce	Payable Time	Add Comments	1.5 of 5 N		TLB-Produces     Ter Doe, John     Reported Time Approval for WRKS on 2020-10-22:Pending     Reports Translateses     Prending     T.ByProduces     Ter Doe, John     T.ByProduces     Ter Doe, John     T.ByProduces     Ter Doe, John     Ter D

• Routed approval transactions will be available under the **HRMS Approvals** tile.

C Employee Self Service			Pending Approvals	ଜ	Q	Ø	:	0
View By Type	*	т						
Al	2	Reported Time					2 10	
Reported Time	2	Reported Time	Cuantity for Approval 40.00 Hours 10/19/2020 - 10/23/2020 Jac Delegated by Doe, John		8	Routed 10/21/20	20	>

	pprovals		Reported Time		ଜ ୧ 🖉 ፡ 🖉
Sr Business 5 line(s) S Delegate	s Analyst ) are pending your approval ed by Doe, John				Approve Deny
Summary					
Quant View Legend • Reported	Time Period 1 Quantity for Approval 4 tity Submitted/ Approved 0 Quantity Denied 0 d d Time Details	0192020 - 10/23/2020 0.00 Hours 0.00 Hours 0.00 Hours		Quantity Scheduled 40.00 Hours Quantity Reported 40.00 Hours	
Pending	All				5 rows
Pending	All Report Date	Time Reporting Code	Quantity for Approval	Reported for Date / Scheduled for Date	5 rows
Pending Select	All Report Date 10/19/2020	Time Reporting Code WRKS - Salaried Worked	Quantily for Approval 8.00 Hours	Reported for Date / Scheduled for Date 8.00 Hours / 8.00 Hours	8 rows
Pending  Pending  Select	All Report Date 10/19/2020 10/20/2020	Time Reporting Code WRKS - Salaried Worked WRKS - Salaried Worked	Quantity for Approval 8 00 Hours 8 00 Hours	Reported for Date / Scheduled for Date 8.00 Hours / 8.00 Hours 8.00 Hours / 8.00 Hours	5 rows > : > :
Pending Pending Select	All Report Date 10/19/2020 10/20/2020 10/21/2020	Time Reporting Code WRKS - Salaried Worked WRKS - Salaried Worked WRKS - Salaried Worked	Quantity for Approval 8 00 Hours 8 00 Hours 8 00 Hours	Reported for Date / Scheduled for Date 8.00 Hours / 8.00 Hours 8.00 Hours / 8.00 Hours 8.00 Hours / 8.00 Hours	5 rows
Pending Select 2 2 2 2 2 2	All Report Date 10/19/2020 10/20/2020 10/21/2020 10/22/2020	Time Reporting Code WRKS - Salaried Worked WRKS - Salaried Worked WRKS - Salaried Worked WRKS - Salaried Worked	Quantity for Approval 8.00 Hours 8.00 Hours 8.00 Hours 8.00 Hours 8.00 Hours	Reported for Date / Scheduled for Date         8.00 Hours / 8.00 Hours         8.00 Hours / 8.00 Hours	δ rows

My Homepage	
nesheet	
pproval Monitor	
Reported Time Approval f	or WRKS on 2020-10-19: Approved OView/Hide Comments
Reported Time/Absence	
Approved for Doe, John TLByPosMgmt 10/21/20 - 9/24 PM	
Comments	
Reported Time Approval f	or WRKS on 2020-10-20:Approved OView/Hide Comments
Reported Time/Absence	
Approved for Doe, Joh TLByPosMgmt 10/21/20 - 9:24 PM	n
Comments	
<ul> <li>Reported Time Approval f</li> </ul>	or WRKS on 2020-10-21:Approved Over/Hide Comments
Reported Time/Absence	
Approved for Doe, Joh TLByPosMgmt 10/21/20 - 9.24 PM	n
Comments	
Reported units operated f	or WRKS on 2020-10-22:Approved Oview/Hide Comments
Reported Time/Absence	The second
Approved	
TLByPosMgmt 10/21/20 - 9:24 PM	n
Comments	