



Manage Delegations- Delegate

Table of Contents

Overview	2
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

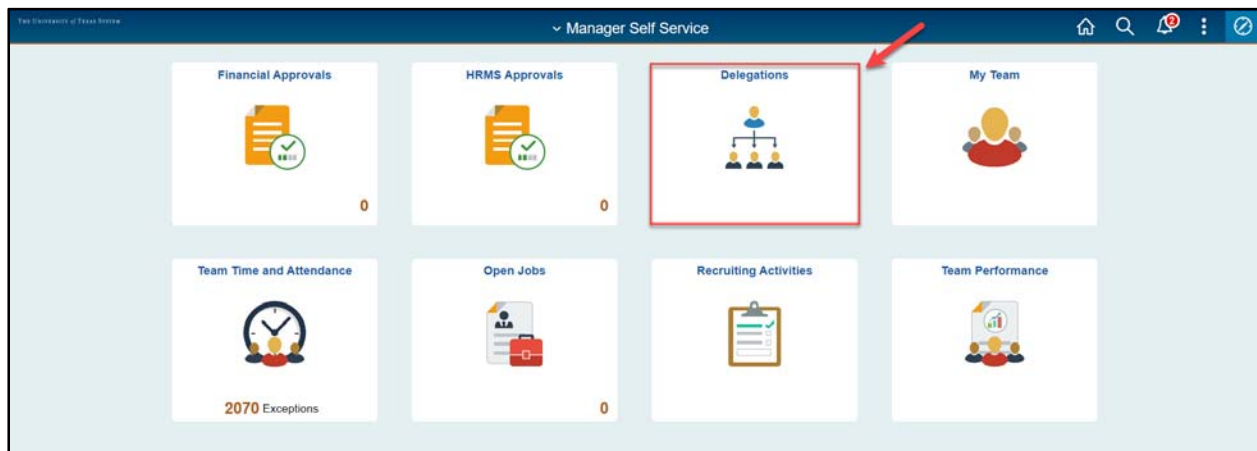
Request Status	Delegation Status	Description
Submitted	Inactive	When a delegator creates a new delegation request the system sets the request status to Submitted and delegation status to Inactive.
Accepted	Active	When a proxy accepts a delegation request, the system sets the request status to Accepted. The delegation status becomes Active only when the following two conditions occur: <ul style="list-style-type: none"> • 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

		<p>system date is greater than the To Date of the delegation authority period.</p> <p>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.</p>
Revoked	Inactive	<p>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.</p> <p>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.</p>


How to Use PeopleSoft Fluid Delegations

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

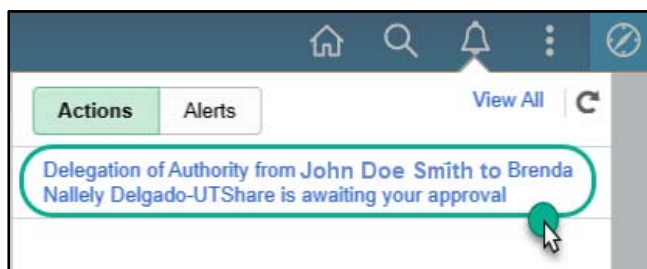
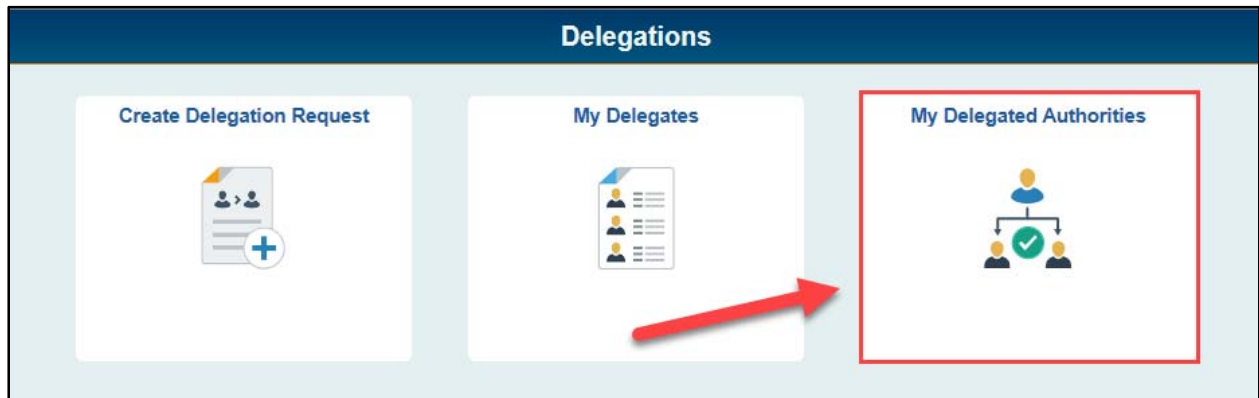
- Because this is a shared tile between **Employee Self Service & Manager Self Service**, if you have it in Employee Self Service it will also show in Manager Self Service and vice-versa.



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  icon.

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



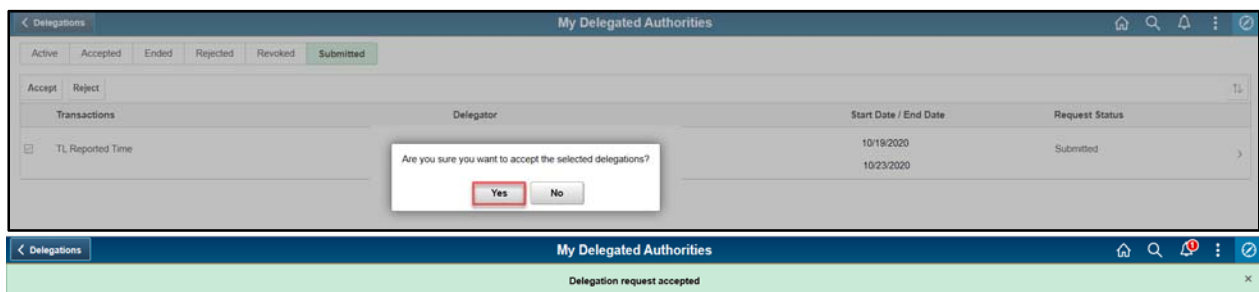
Step 2 of 4 – Accept or Reject

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



Step 3 of 4 – Confirm

Select **Yes** to confirm.

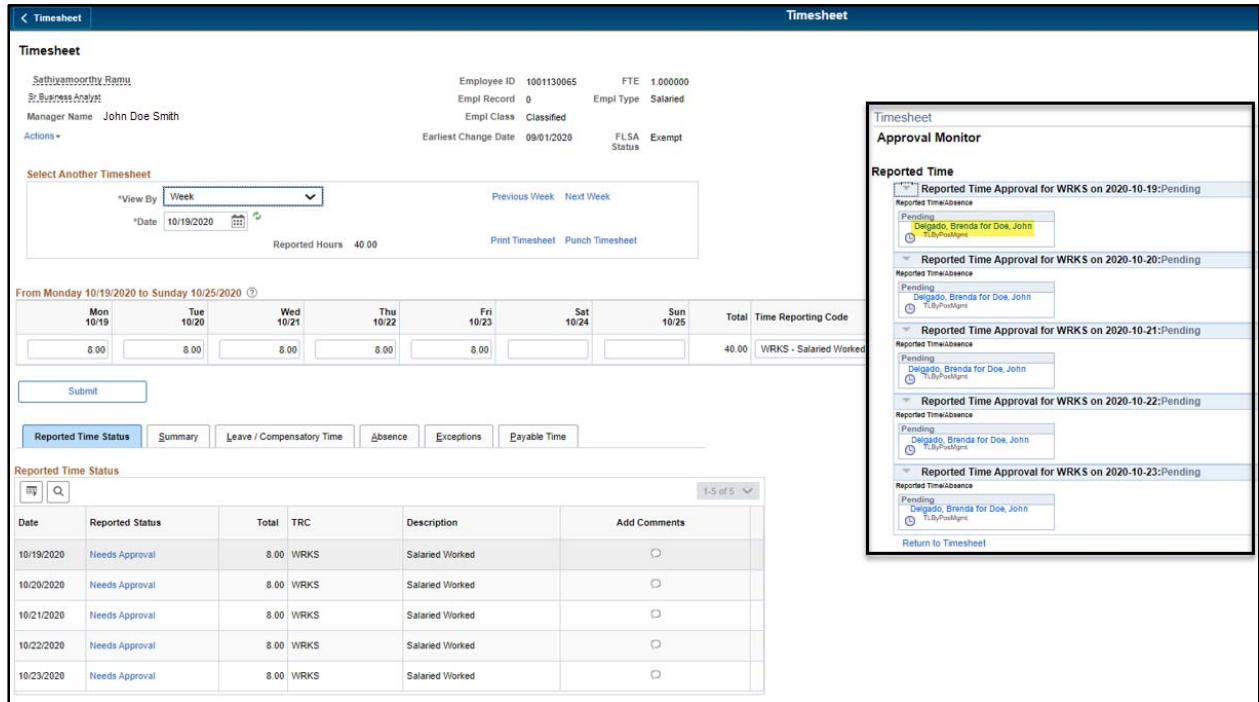


Step 4 of 4 – Accepted Status

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



- The delegator’s report to employee will be displayed the routed approval.



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



Reported Time

Sathiyamoorthy Ramu
Sr Business Analyst

5 line(s) are pending your approval
Delegated by Doe, John

Summary

Time Period 10/19/2020 - 10/23/2020

Quantity for Approval 40.00 Hours Quantity Scheduled 40.00 Hours

Quantity Submitted/ Approved 0.00 Hours Quantity Reported 40.00 Hours

Quantity Denied 0.00 Hours

[View Legend](#)

Reported Time Details

Pending **All**

5 rows

Select	Report Date	Time Reporting Code	Quantity for Approval	Reported for Date / Scheduled for Date
<input checked="" type="checkbox"/>	10/19/2020	WRKS - Salaried Worked	8.00 Hours	8.00 Hours / 8.00 Hours
<input checked="" type="checkbox"/>	10/20/2020	WRKS - Salaried Worked	8.00 Hours	8.00 Hours / 8.00 Hours
<input checked="" type="checkbox"/>	10/21/2020	WRKS - Salaried Worked	8.00 Hours	8.00 Hours / 8.00 Hours
<input checked="" type="checkbox"/>	10/22/2020	WRKS - Salaried Worked	8.00 Hours	8.00 Hours / 8.00 Hours
<input checked="" type="checkbox"/>	10/23/2020	WRKS - Salaried Worked	8.00 Hours	8.00 Hours / 8.00 Hours

My Homepage

Timesheet

Approval Monitor

Reported Time

Reported Time Approval for WRKS on 2020-10-19: Approved [View/Hide Comments](#)

Reported Time/Absence

Approved
Delegado, Brenda for Doe, John
✓ TLByPosMgmt
10/21/20 - 9:24 PM

Comments

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10/21/20 - 9:24 PM

Comments

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Comments