DELEGATING APPROVALS (APPROVAL PROXY)

As a Manager you have access to the HR Manager Self Service to approve your subordinate's transactions. This is automatically granted to you as a manager and you can access it through HORUS.

When delegating transactions, you are allowing a proxy to <u>approve</u> transactions on your behalf. You may choose to delegate your transactions for the following reasons:
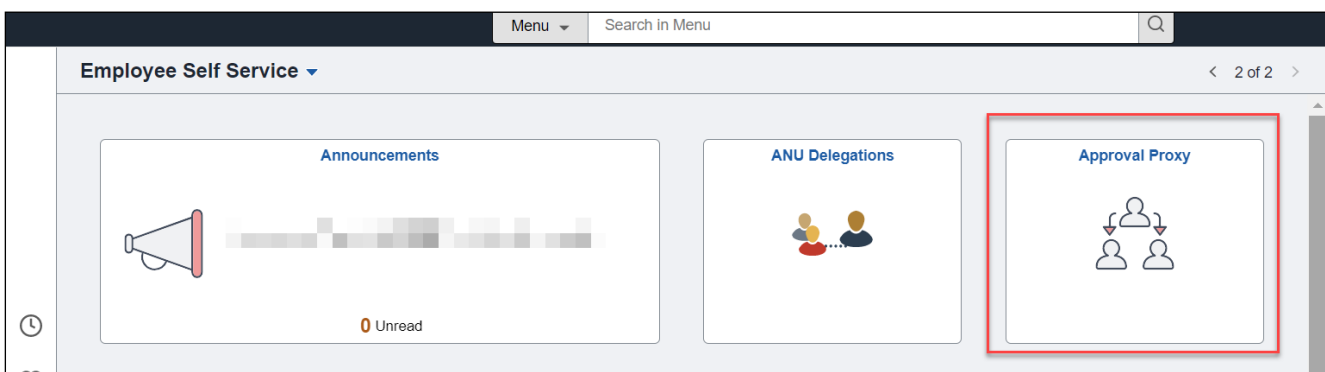
- You know that you'll be away from the office for an extended period of time, and thus won't be able to manage transactions for <u>you or your employees</u>. You can delegate your transactions to someone else for a specific period of time.
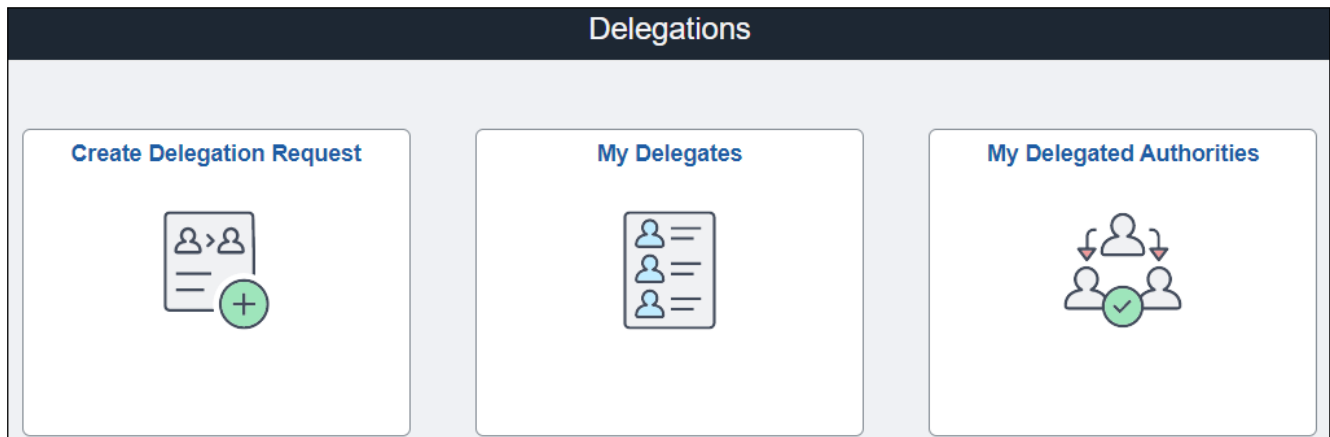
  Note: The short term acting delegation form have an option to assign proxy to the acting employee as well. Further information can be found on <u>ANU Delegations page</u>.

- You prefer to have an assistant process all of your transactions. You can delegate all of your transactions to someone else for an indefinite period of time.

There are three links on the **Approval Proxy** tile under Employee Self Service Home Page - one for each way of managing delegation:

- **Create Delegation Request** - To create a new delegation request so that your transaction(s) can be taken care of by a proxy.
- **My Delegates** - To view a list of transactions that you have delegated to proxies and to revoke the delegated authority of proxies.
- **My Delegated Authorities** - To view a list of transactions that have been delegated to you. You can either accept the request or reject the request.
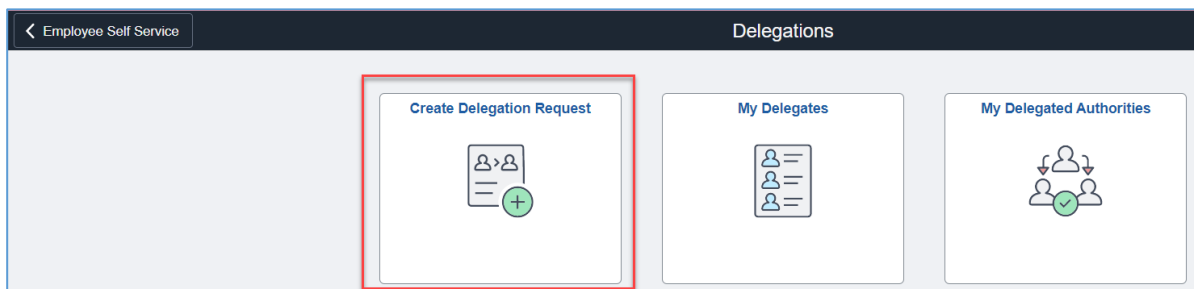
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Creating a new delegation authority

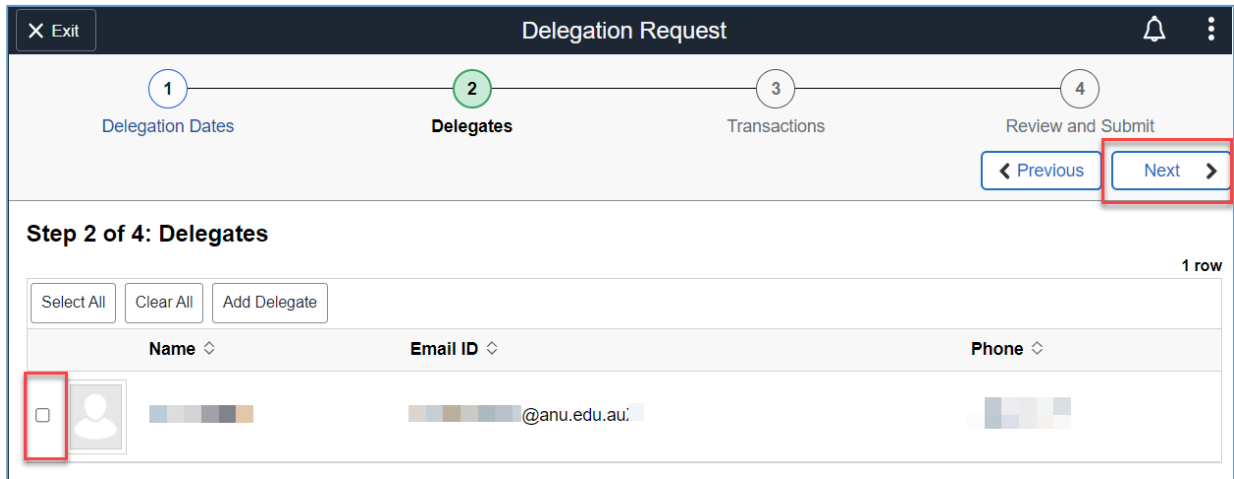|	
1.	Navigation**: Employee Self Service > Approval Proxy > Create Delegation Request**
2.	Nominate the Start and End dates for the approval proxy, enter a Comment, select the Next button. Note: For ongoing delegation leave the end date blank.

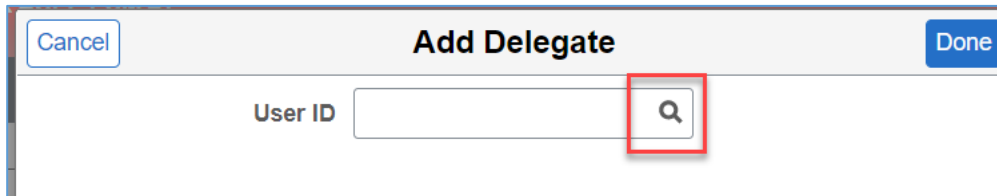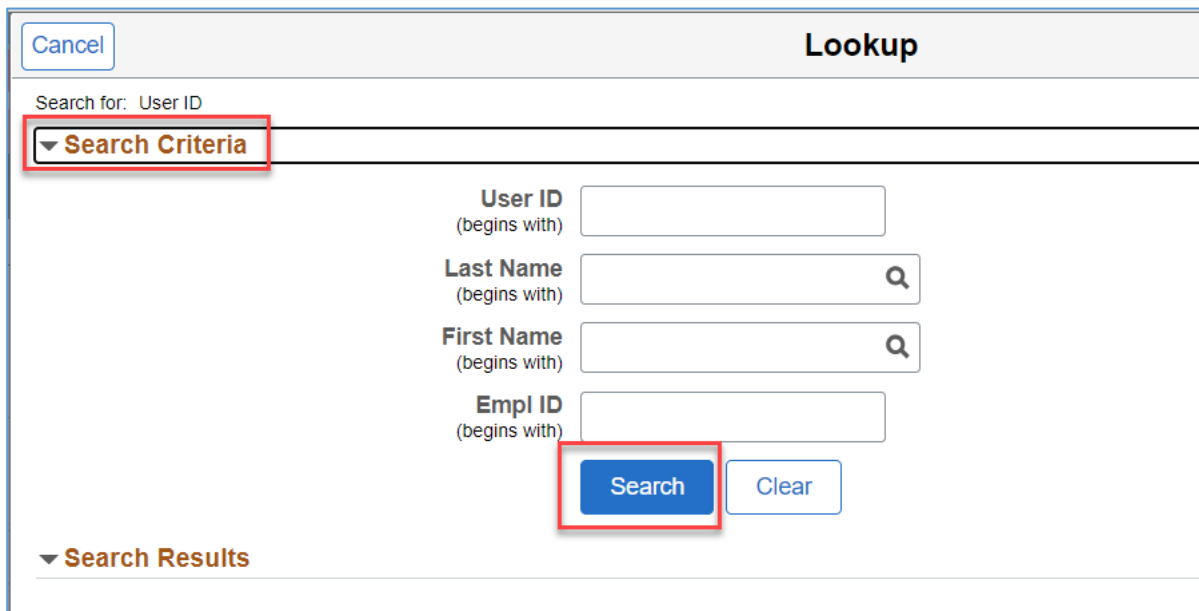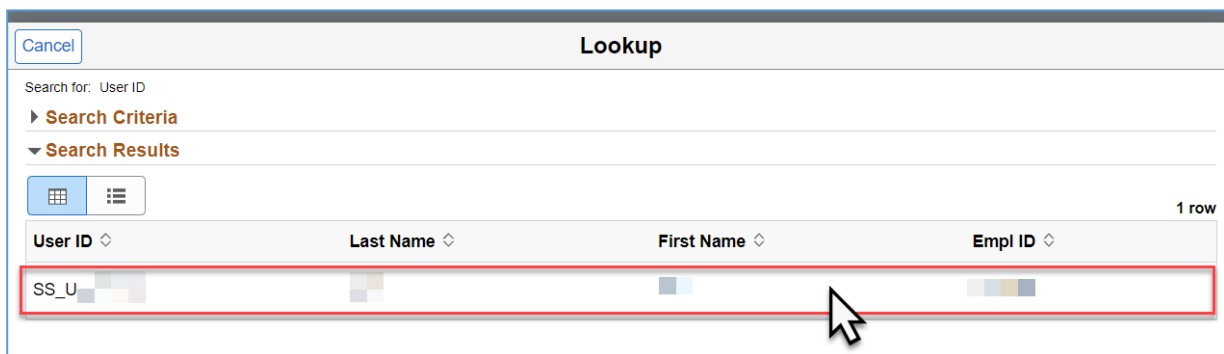| 3.	Select the individual you wish to act as your proxy, select the Next button.
	If the person doesn't appear here follow the steps below, otherwise go to step 9.
4.	OR, if the person does not appear here, click the Add Delegate button.

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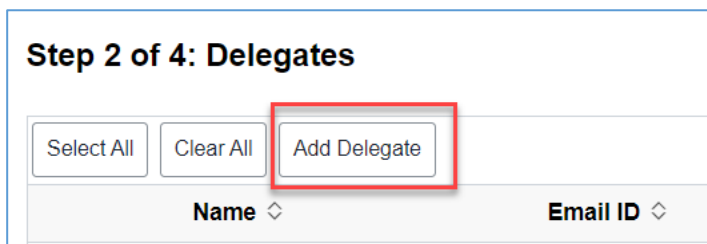
5.	The Search page displays. Click on the magnifying glass 🔍 to search for employee.

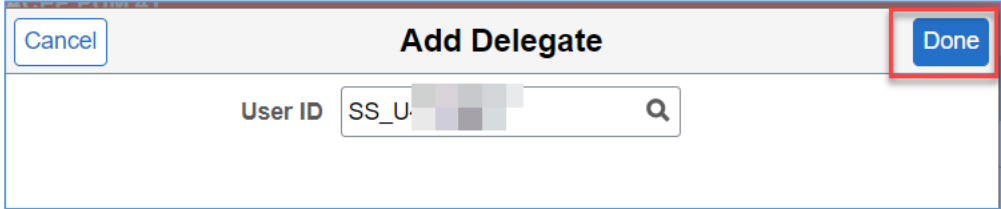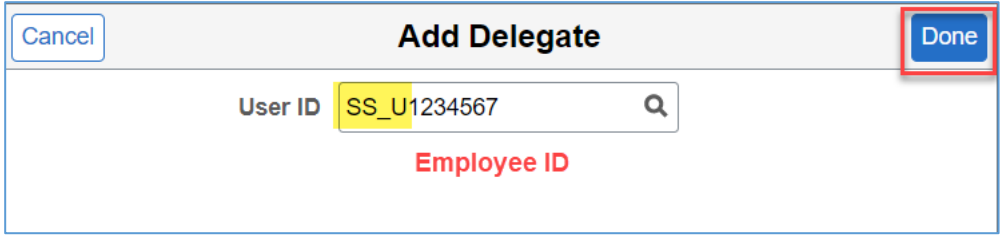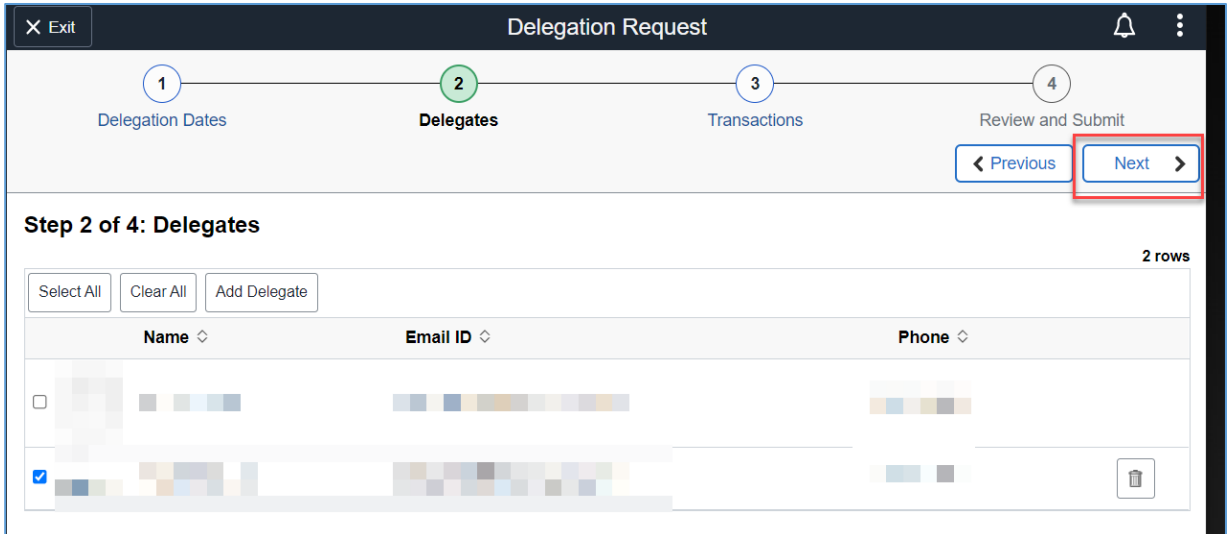| Cancel	**Add Delegate**	Done

User ID [＿＿＿＿＿＿ 🔍]

Expand the Search Criteria field. Enter the Parameters to search for the person and Click the Search button.

Cancel	**Lookup**

Search for: User ID

▼ **Search Criteria**

User ID
(begins with) [＿＿＿＿＿＿]

Last Name
(begins with) [＿＿＿＿＿＿ 🔍]

First Name
(begins with) [＿＿＿＿＿＿ 🔍]
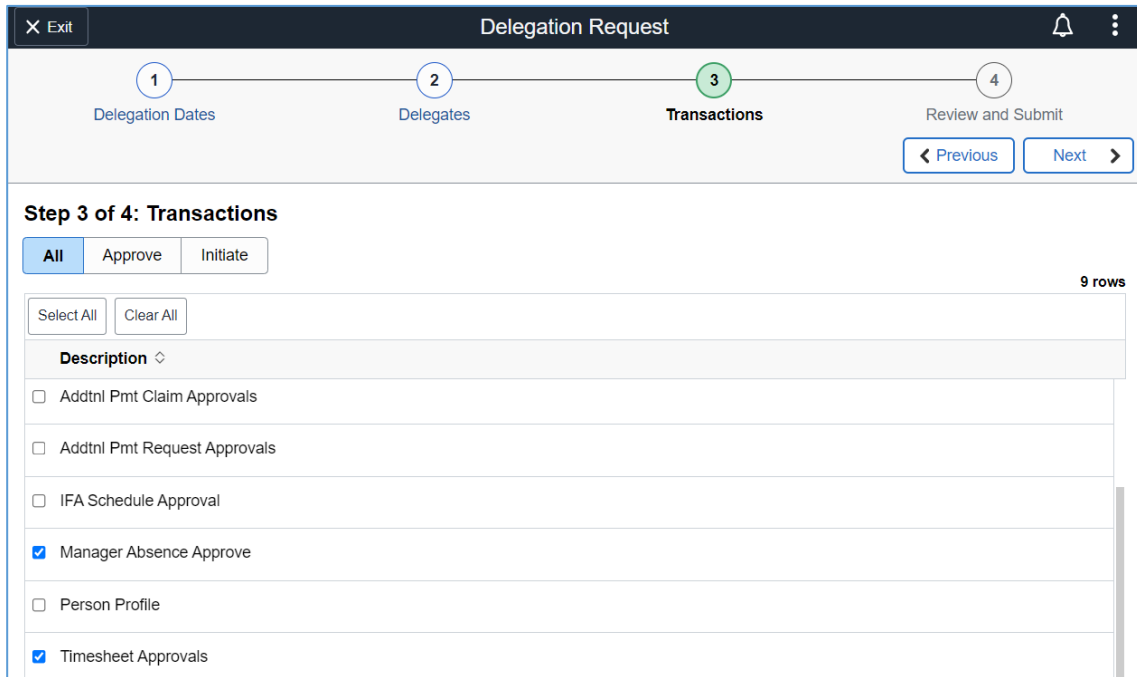
Empl ID
(begins with) [＿＿＿＿＿＿]

[Search]   [Clear]

▼ **Search Results**

The search results are returned. Select the individual you wish to act as your proxy. Click the Done button.

Cancel	**Lookup**

Search for: User ID
▶ Search Criteria
▼ Search Results

1 row

User ID ◇	Last Name ◇	First Name ◇	Empl ID ◇
SS_U▢▢▢	▢▢	▢	▢▢▢

	Add Delegate — Cancel / Done / User ID: SS_U▓▓▓
6.	Alternatively, Enter "SS_U" plus the UniID of the proxy in the User ID field.
	Add Delegate — Cancel / Done / User ID: SS_U1234567 / **Employee ID**
7.	Click on the Next button.

8.	Select the transaction you wish to delegate, click the Next button.
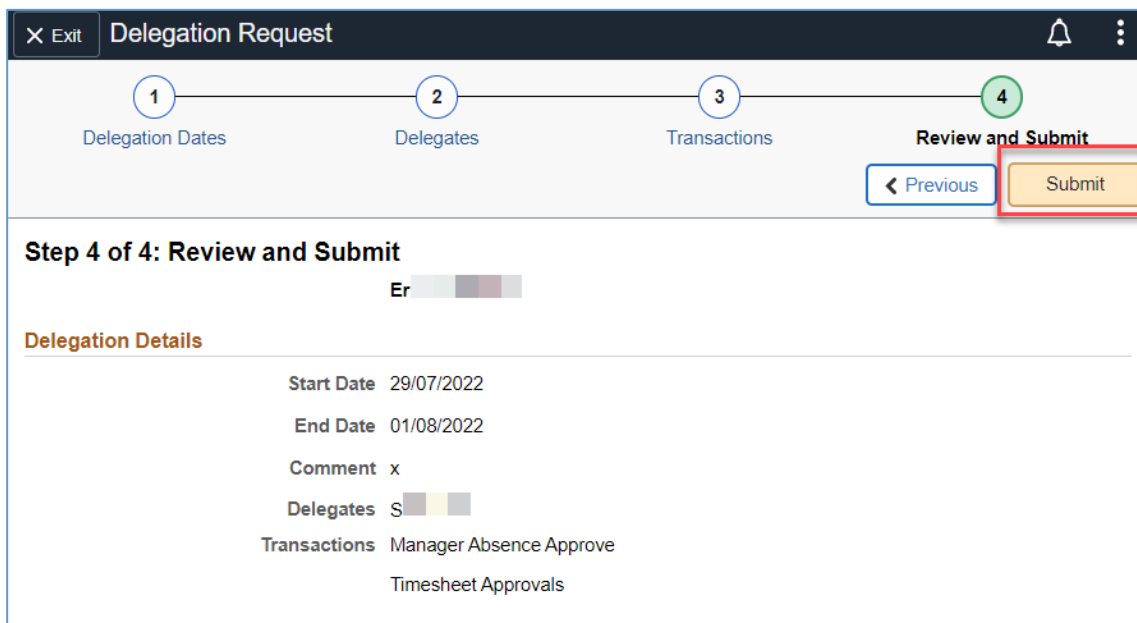
9.	Click the Submit button.

10.	The Delegation Request Successfully Submitted message appears.

|	The selected person will receive an email with a link to accept the proxy. The proxy will need to accept the pending delegation request in order for it to become active. **End of Procedure.**

Accepting approval proxy request

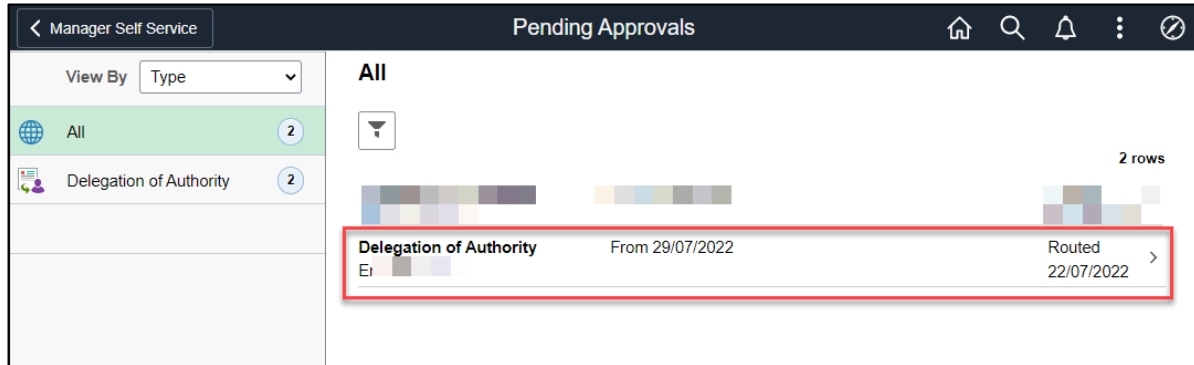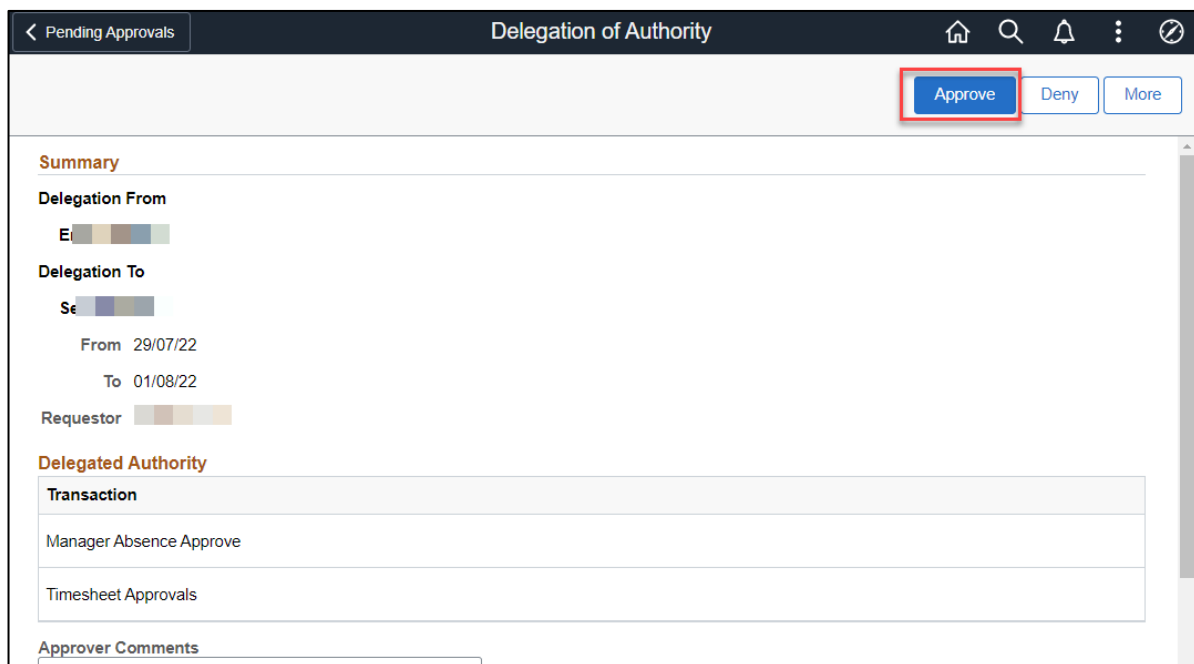|	
1.	When submitted, the selected person will receive an email with a link to accept the proxy. The proxy will need to accept the pending delegation request in order for it to become active. **Proxy accepts delegation request:** Option 1: Navigation**: Employee Self Service > Approval Proxy > My Delegated Authorities**
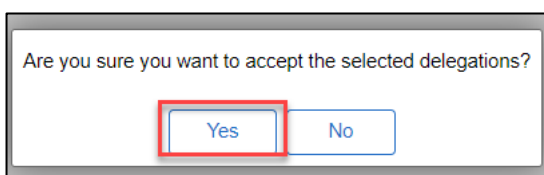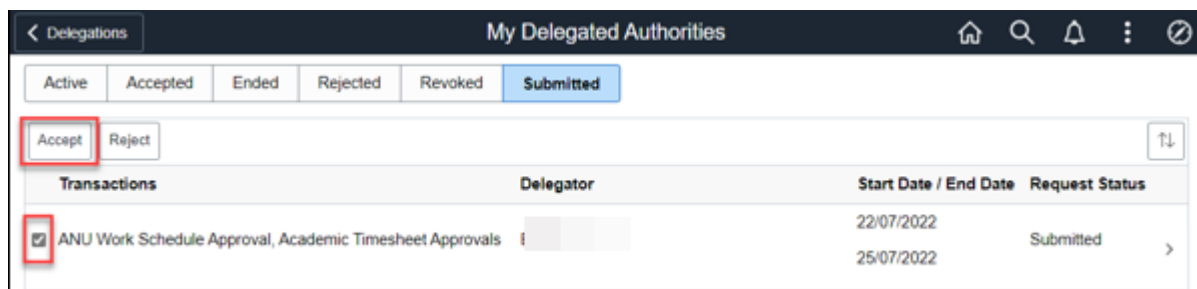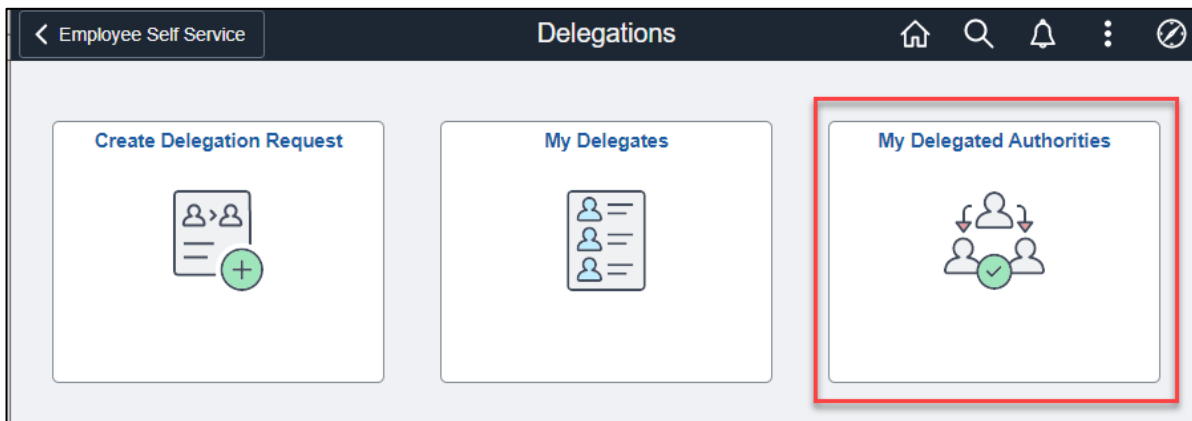
Option 2 (for user with Manager Self Service):

Navigation**: Manager Self Service > Approvals > Delegation of Authority**

End of Procedure.

Reviewing your list of proxies
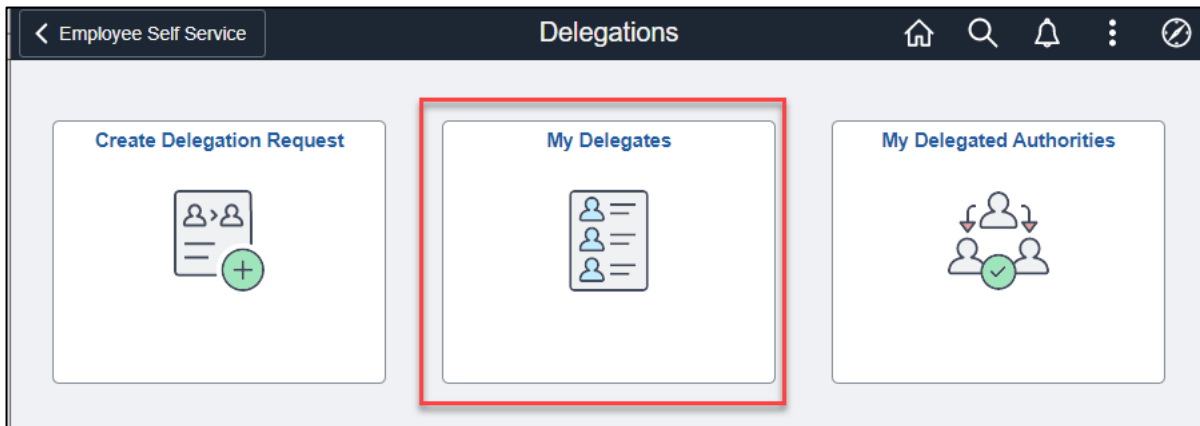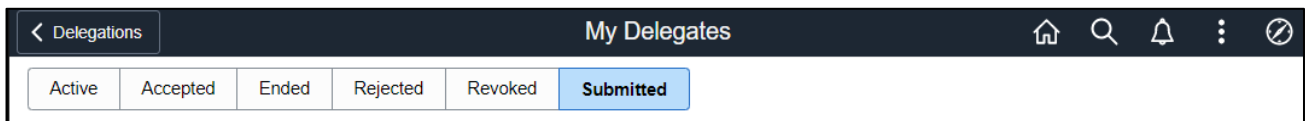
1.	Navigation**: Employee Self Service > Approval Proxy > My Delegates**
2.	Click the different request status.
3.	A list of your delegations will be displayed. **End of Procedure.**

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Revoking an Approval Proxy
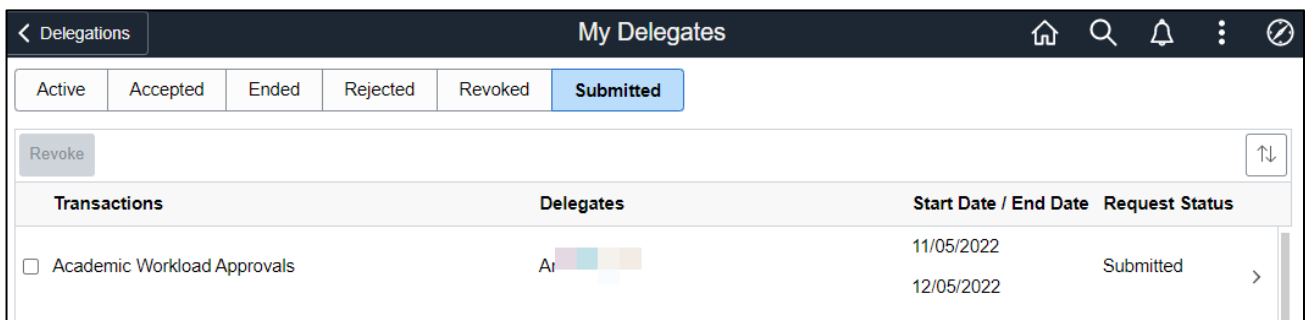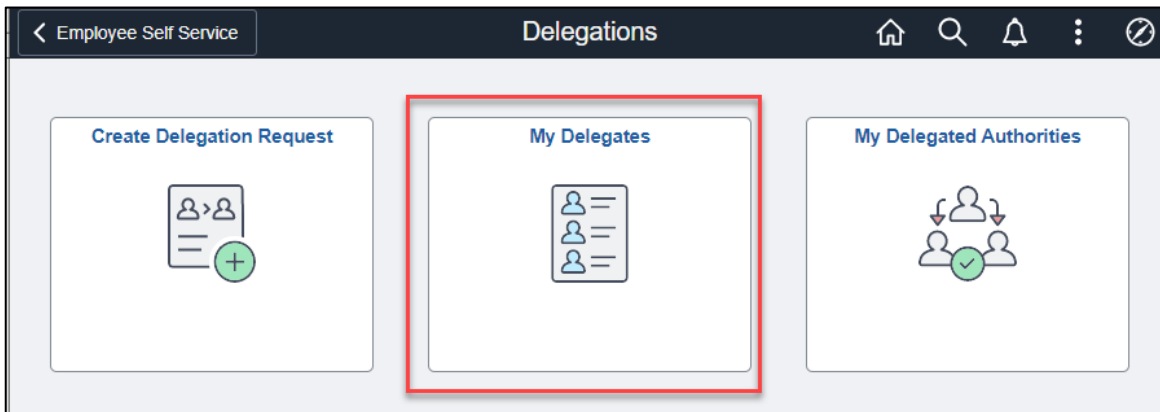
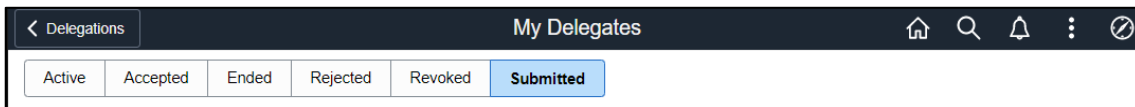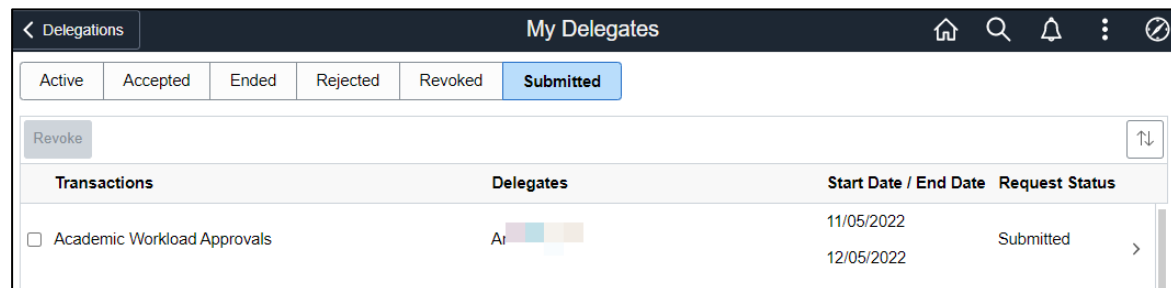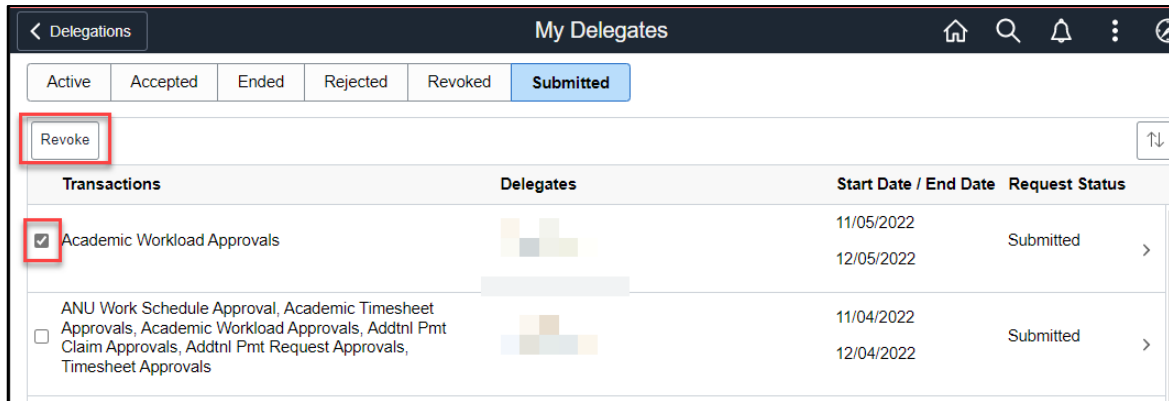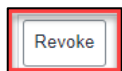|	
1.	Navigation**: Employee Self Service > Approval Proxy > My Delegates**
2.	Click the different request status.
3.	A list of your delegations will be displayed.

4.	Select the Checkbox corresponding to the Delegation you wish to Revoke.
5.	Click the Revoke button
6.	The Revoke Delegation confirmation page appears.
7.	Click the Yes button to continue with the revocation. **End of Procedure.**

Frequently Asked Questions

Who can I delegate transactions to?

Just about anyone. The other person does not have to be a manager, and they don't have to report to you.

What happens when I delegate Approval authority to someone?

When you delegate Approval authority to a proxy, this person can act on your behalf to approve pending transactions. The proxy will be notified of pending transactions (just as you are), and can execute the approval. In the event that the transaction must go up another level in the organization hierarchy, the next level approver(s) will be determined based upon <u>your</u> position in the hierarchy - not the proxy's.

How do I specify a window of time for delegating transactions?

When you create a delegation request, you'll need to specify From Date and To Date. A blank To Date indicates that the delegation is in effect indefinitely. A populated From Date indicates that the delegation is in effect from that date forward, until the To Date (if the To Date is populated).

Can I remove myself as a delegate for someone else?

When you receive a delegation request, you may reject the request. However, after you accept the request, you have to contact either your delegator or HR team to revoke the request.