

HRMS - CREATING APPROVAL PROXY

Supervisors have access to the HR Manager Self Service to delegate transactions approval to proxy to approve transactions on their behalf.

Supervisors may choose to delegate your transactions for the following reasons:

- Supervisor will be away from the office for an extended period of time, and thus won't be able to manage transactions for employees. Supervisors can delegate 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 [ANU Delegations page](#).

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

Further information about Supervisor setting up approval proxy via Manager Self Service can be found under [User guides](#).

This guide is for HR practitioners to create and review approval proxy on behalf of supervisor.

Navigation: **NavBar > Menu > Enterprise Components > Delegation**

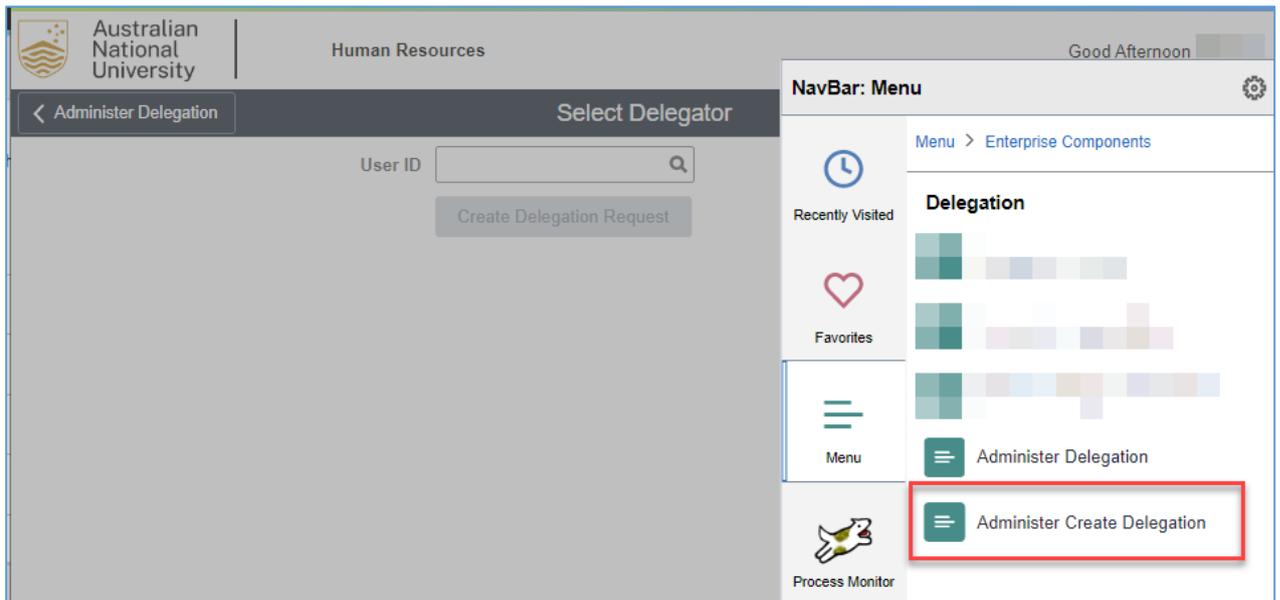
- **Administer Create Delegation** - To create a new delegation request so that transaction(s) can be taken care of by a proxy.
- **Administer Delegation** - To view a list of transactions that have been delegated to proxies and to revoke the delegated authority of proxies.

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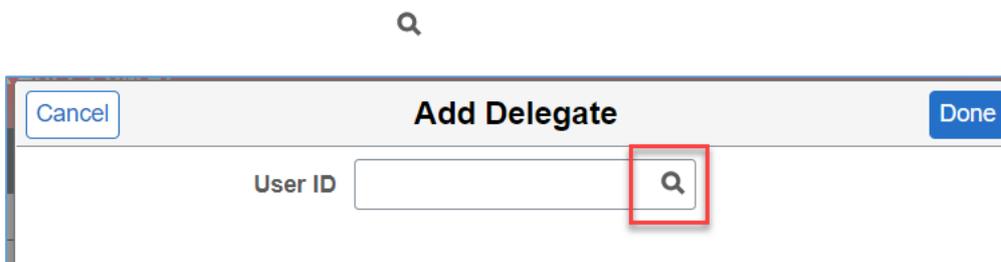
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Creating a new delegation authority

1. Navigation: **NavBar > Menu > Enterprise Components > Delegation > Administer Create Delegation**



2. Select the individual who wish to delegate the approvals (delegator is the supervisor that will be going away).



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 delegator. Click on the “Create Delegation Request” button.

Cancel
Lookup

Search for: User ID

▶ Search Criteria

▼ Search Results

Table
List
1 row

User ID	Last Name	First Name	Empl ID
SS_U			

Australian National University

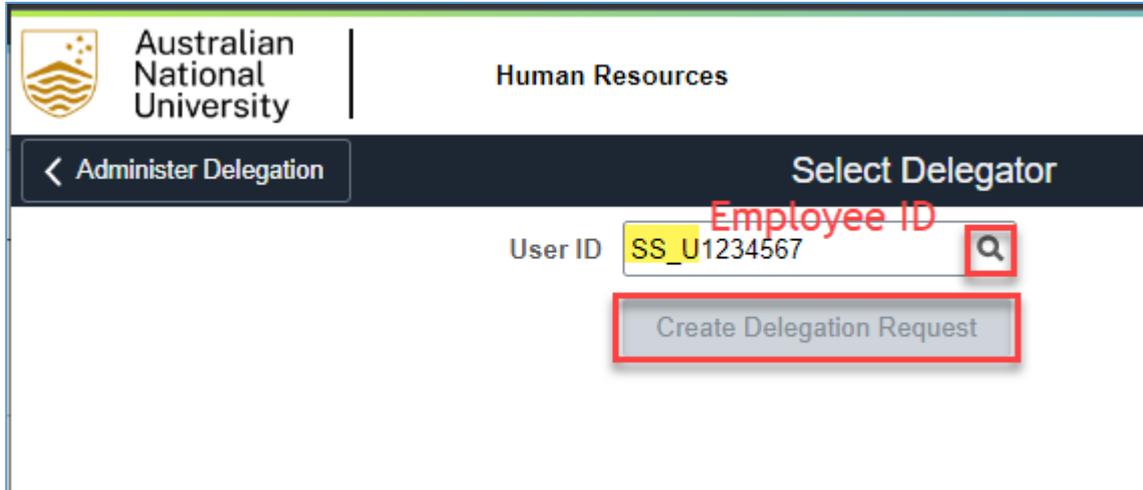
Human Resources

← Administer Delegation
Select Delegator

User ID

Create Delegation Request

3. Alternatively, Enter “SS_U” plus the UniID of the delegator in the User ID field.



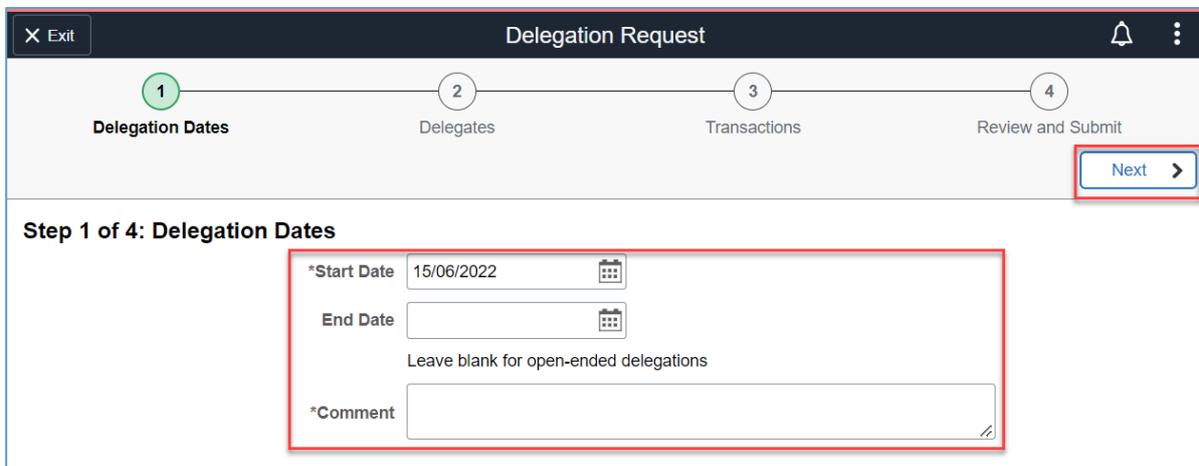
Australian National University | Human Resources

< Administer Delegation | Select Delegator

User ID **Employee ID**

4. 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.



Delegation Request

1 Delegation Dates | 2 Delegates | 3 Transactions | 4 Review and Submit

Step 1 of 4: Delegation Dates

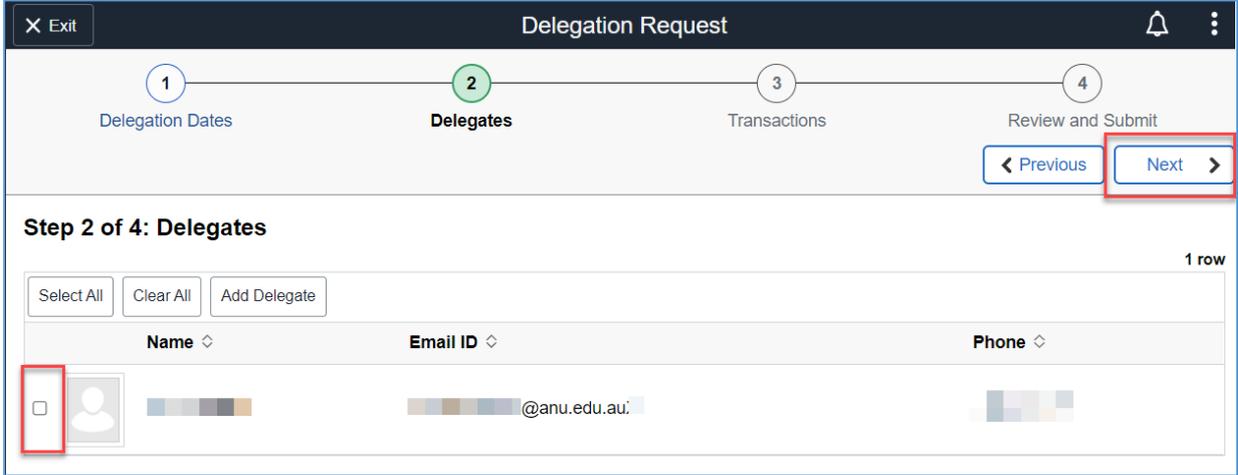
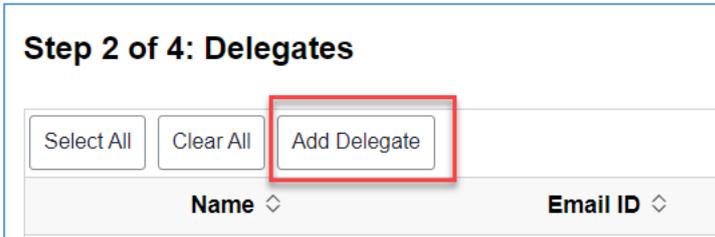
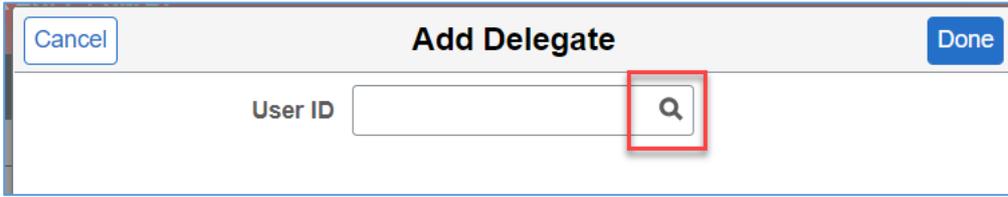
*Start Date

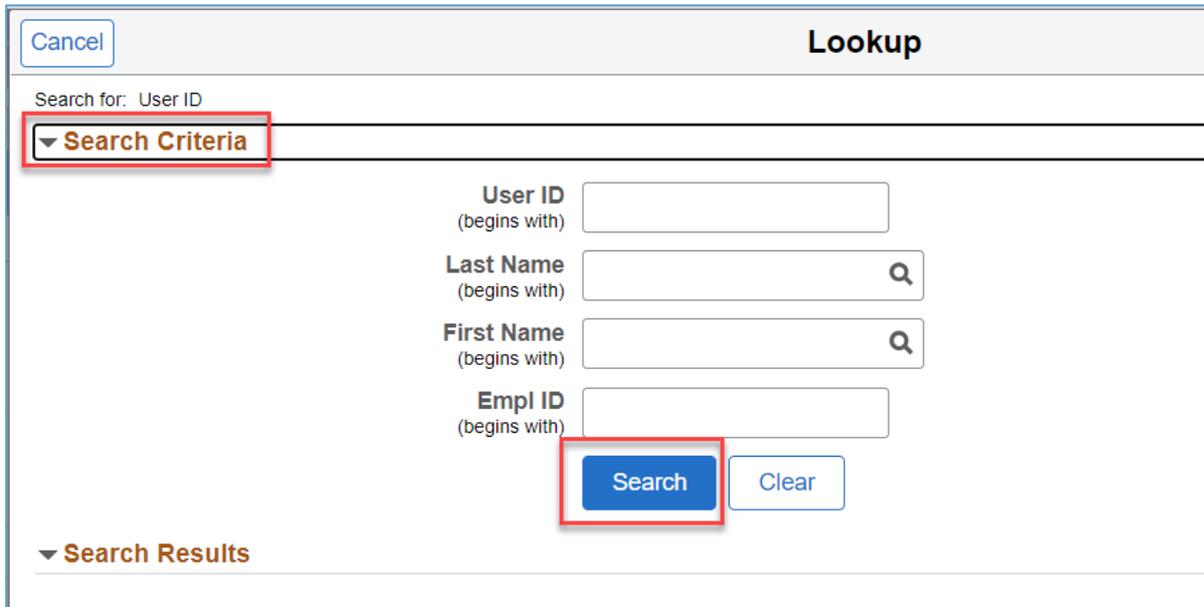
End Date

Leave blank for open-ended delegations

*Comment

5. Select the individual you wish to act as proxy, select the [Next](#) button.

	 <p>If the person doesn't appear here follow the steps below, otherwise go to step 9.</p>
6.	<p>OR, if the person does not appear, click the Add Delegate button.</p> 
7.	 <p>Expand the search criteria field. Enter the parameters to search for the person and click the Search button.</p>



Lookup

Search for: User ID

▼ **Search Criteria**

User ID (begins with)

Last Name (begins with)

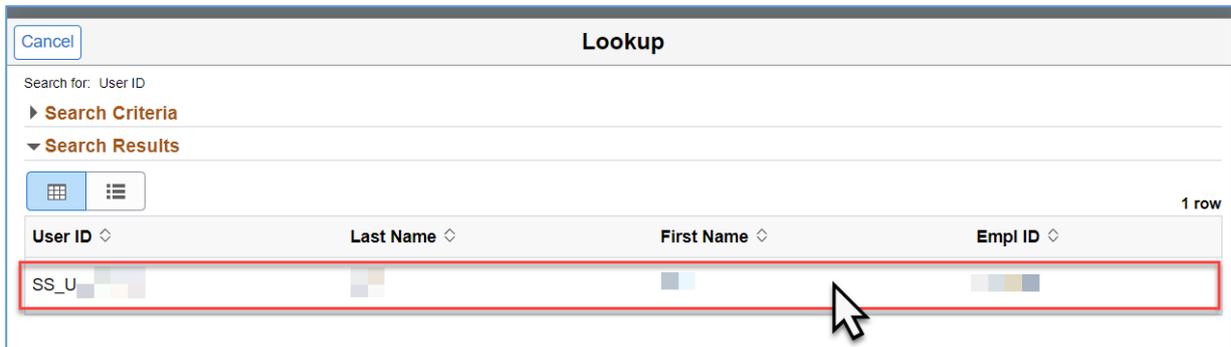
First Name (begins with)

Empl ID (begins with)

Search

▼ **Search Results**

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



Lookup

Search for: User ID

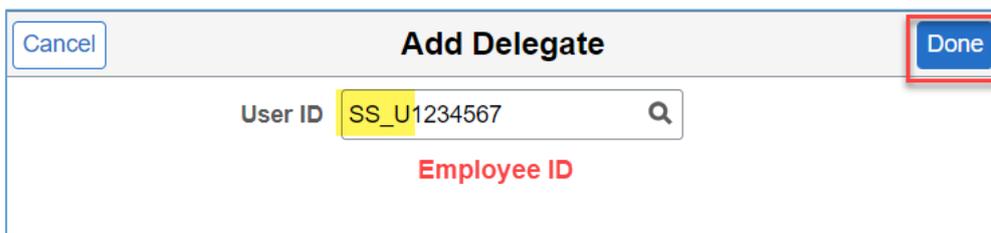
▶ **Search Criteria**

▼ **Search Results**

1 row

User ID	Last Name	First Name	Empl ID
SS_U			

8. Alternatively, Enter "SS_U" plus the UniID of the proxy in the User ID field.

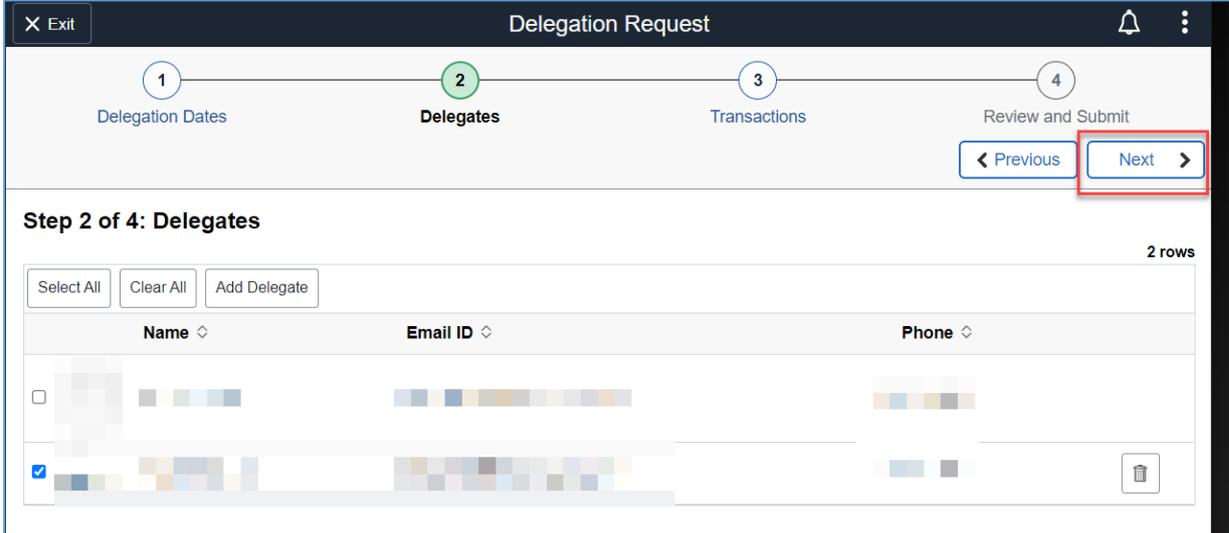


Add Delegate

User ID

Employee ID

9. Click on the **Next** button.

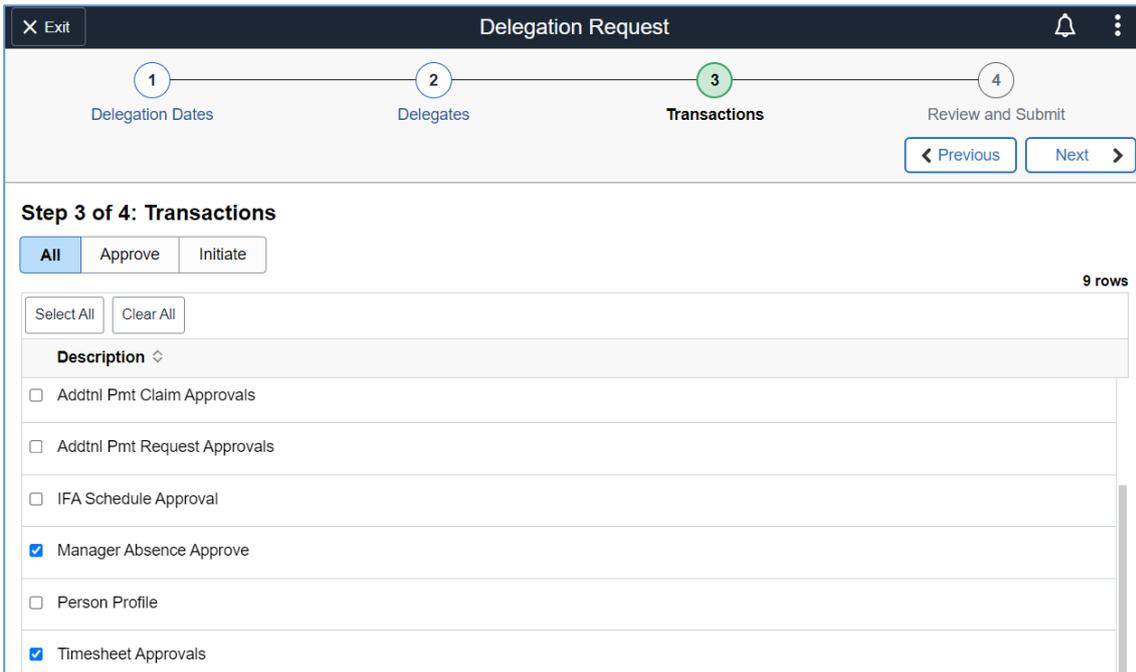


Step 2 of 4: Delegates

Select All Clear All Add Delegate

	Name	Email ID	Phone
<input type="checkbox"/>	[blurred]	[blurred]	[blurred]
<input checked="" type="checkbox"/>	[blurred]	[blurred]	[blurred]

10. Select the transaction you wish to delegate, click the [Next](#) button.



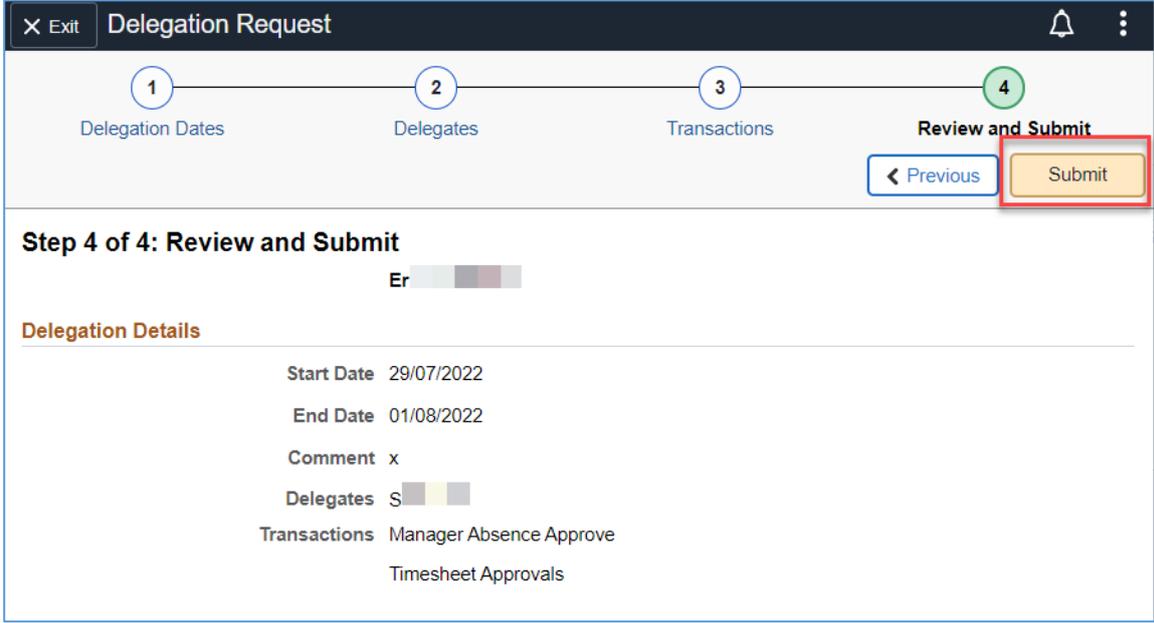
Step 3 of 4: Transactions

All Approve Initiate

Select All Clear All

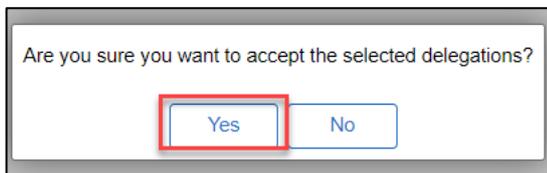
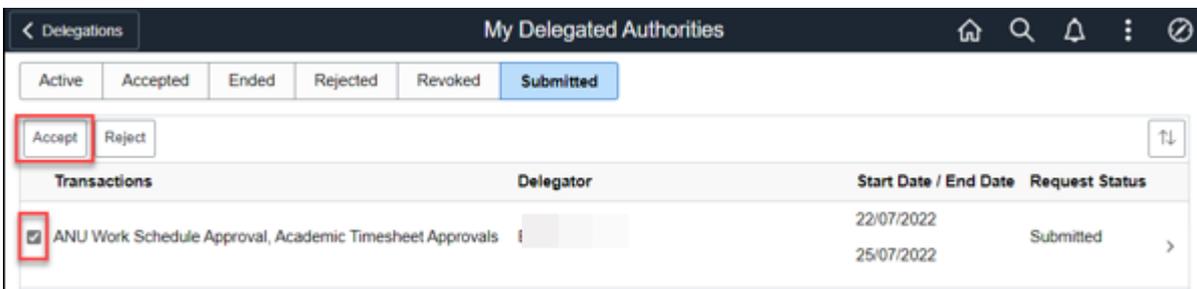
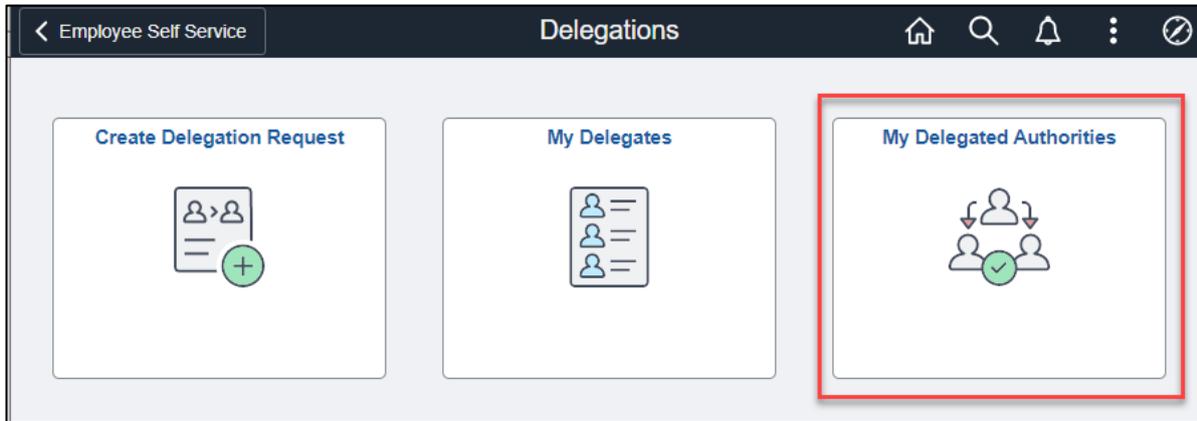
	Description
<input type="checkbox"/>	Addnl Pmt Claim Approvals
<input type="checkbox"/>	Addnl Pmt Request Approvals
<input type="checkbox"/>	IFA Schedule Approval
<input checked="" type="checkbox"/>	Manager Absence Approve
<input type="checkbox"/>	Person Profile
<input checked="" type="checkbox"/>	Timesheet Approvals

11. Click the [Submit](#) button.

	
<p>12.</p>	<p>The delegation request successfully submitted. (Note: there is currently an error message on this page that we are investigating further, no action required).</p> <p>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.</p> <p>End of Procedure.</p>

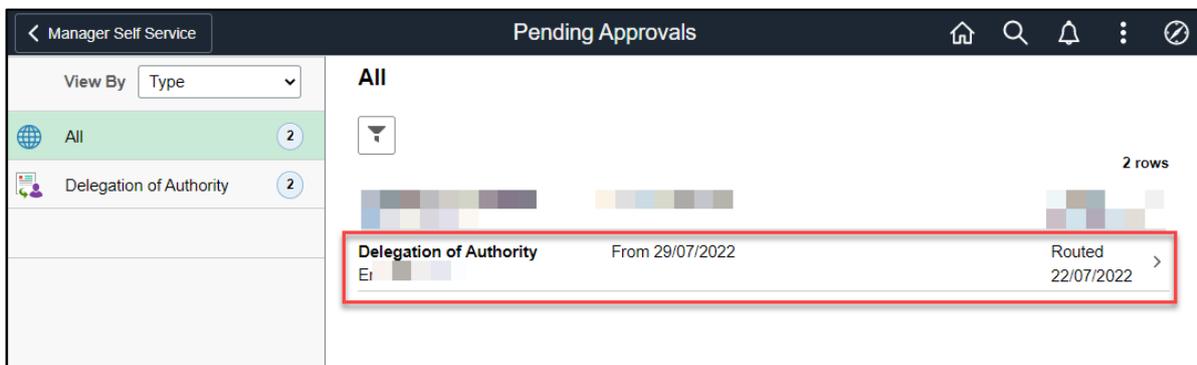
Accepting approval proxy request

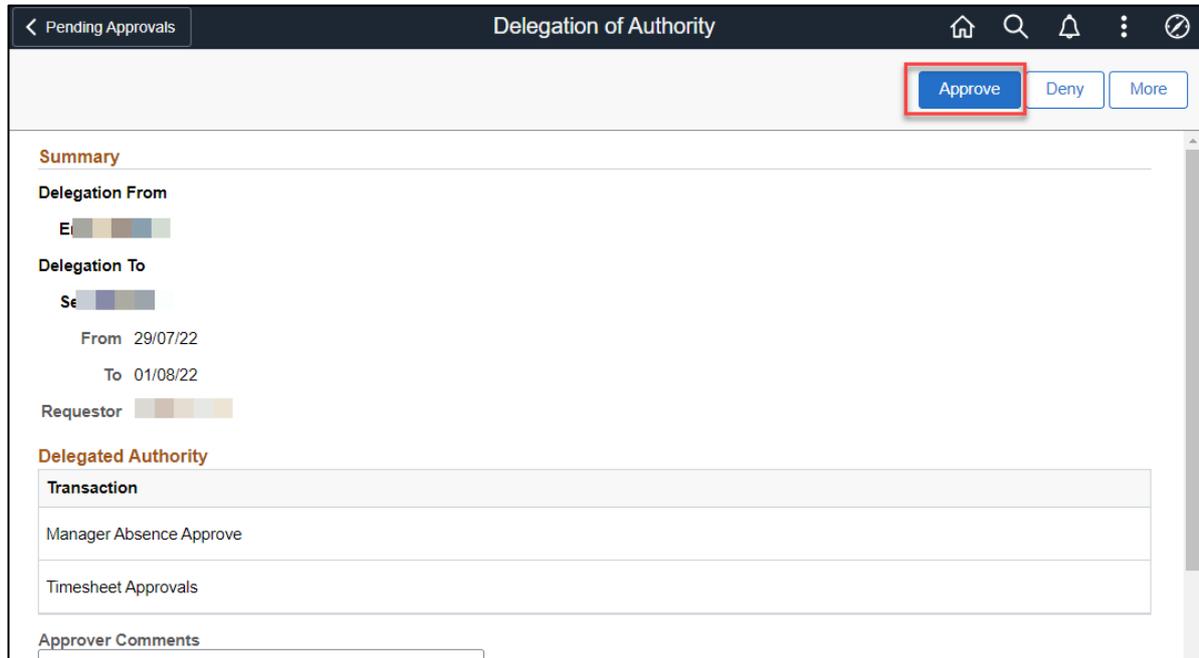
<p>1.</p>	<p>When submitted, the selected person will receive an email with a link to accept the proxy. The proxy will need to accept the pending delegation request in order for it to become active.</p> <p>Proxy accepts delegation request:</p> <p>Option 1:</p> <p>Navigation: Employee Self Service > Approval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

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





Delegation of Authority

Approve Deny More

Summary

Delegation From
E [Avatar]

Delegation To
S [Avatar]

From 29/07/22
To 01/08/22

Requestor [Avatar]

Delegated Authority

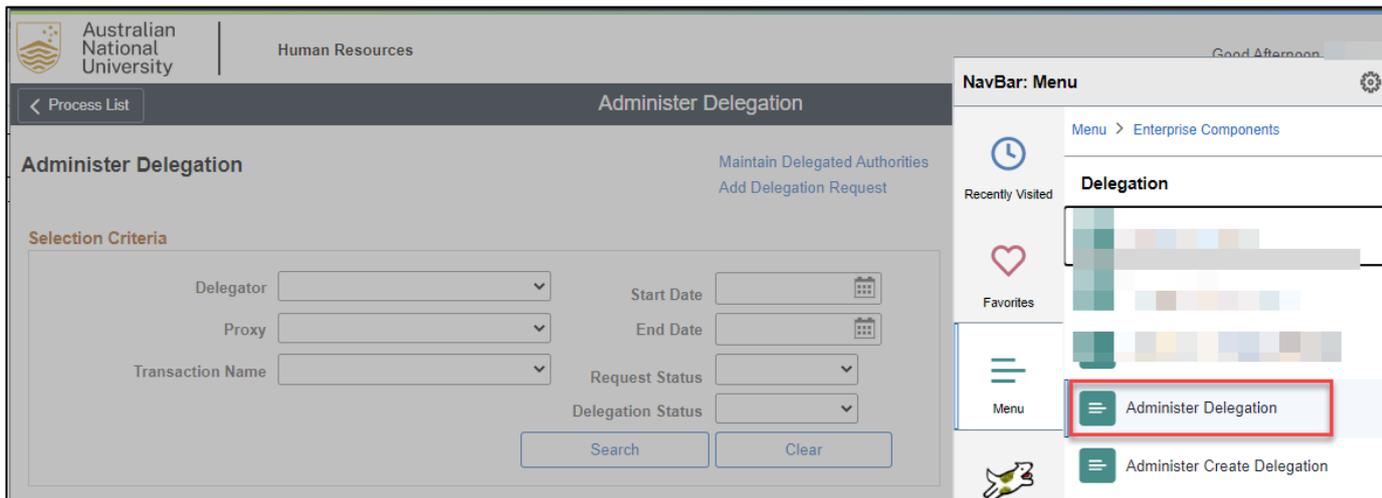
Transaction
Manager Absence Approve
Timesheet Approvals

Approver Comments

End of Procedure.

Reviewing list of proxies

1. Navigation: **NavBar > Menu > Enterprise Components > Delegation > Administer Create Delegation**

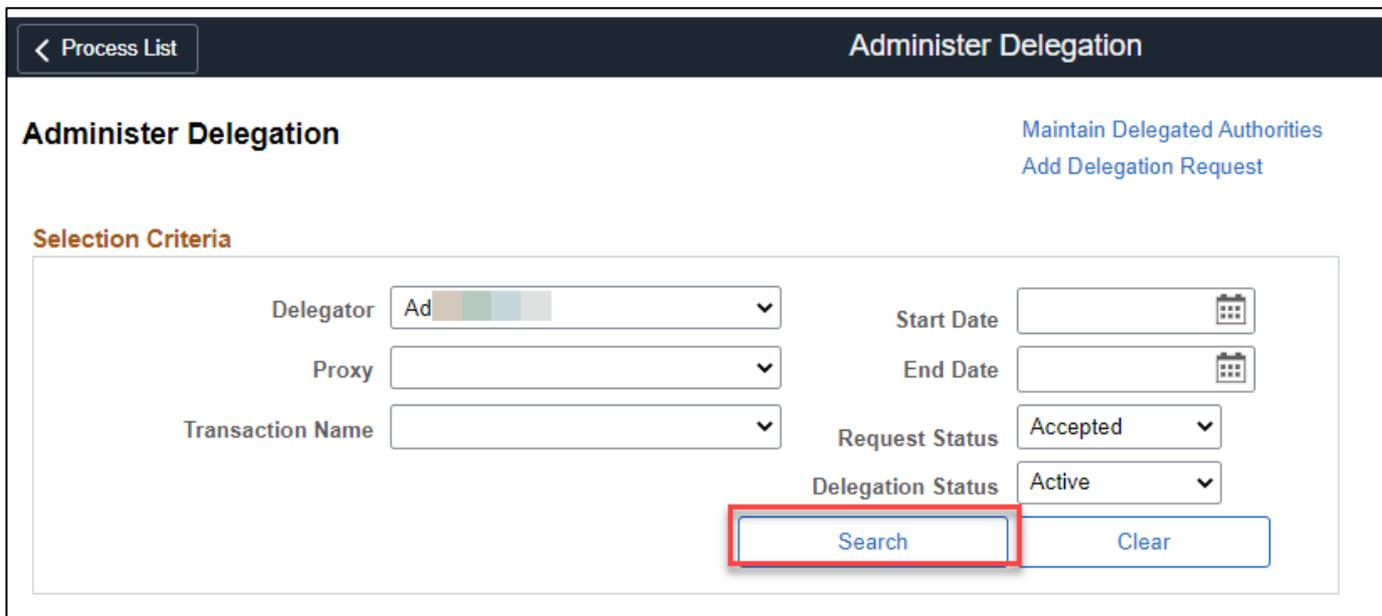


The screenshot shows the 'Administer Delegation' page. The navigation menu on the right is titled 'NavBar: Menu' and includes a breadcrumb trail: 'Menu > Enterprise Components'. Under 'Recently Visited', there are several items, and 'Administer Delegation' is highlighted with a red box. Below it, 'Administer Create Delegation' is also visible. The main content area has a header 'Administer Delegation' with links for 'Maintain Delegated Authorities' and 'Add Delegation Request'. The 'Selection Criteria' section contains the following fields:

- Delegator: [Dropdown menu]
- Proxy: [Dropdown menu]
- Transaction Name: [Dropdown menu]
- Start Date: [Date picker]
- End Date: [Date picker]
- Request Status: [Dropdown menu]
- Delegation Status: [Dropdown menu]

Buttons for 'Search' and 'Clear' are located at the bottom of the form.

2. Enter parameters required eg Delegator or Proxy name, click on [Search](#).
Request that are currently active have a request status of Accepted and delegation status of Active.



This screenshot shows the 'Administer Delegation' page with the search criteria filled out. The 'Delegator' field contains the text 'Ad'. The 'Request Status' dropdown is set to 'Accepted' and the 'Delegation Status' dropdown is set to 'Active'. The 'Search' button is highlighted with a red box.

3. A list of delegations will be displayed. Click on the [Request Details](#) tab for more information.

Search Results

Delegation Request | Request Details | [Filter Icon]

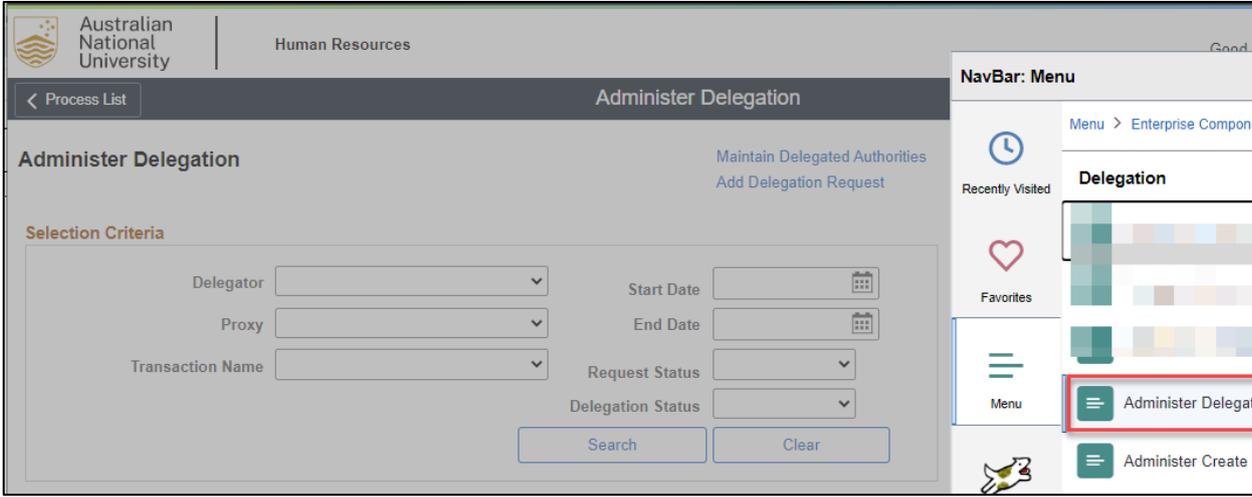
	Description	Delegator	Delegator	Proxy	Delegate
<input type="checkbox"/>	Manager Absence Approve	SS_U		SS_U	
<input type="checkbox"/>	Request Leave of Absence	SS_U		SS_U	
<input type="checkbox"/>	Request Leave of Absence	SS_U		SS_U	
<input type="checkbox"/>	Timesheet Approvals	SS_U		SS_U	

Select All | Deselect All | Revoke

End of Procedure.

Revoking an Approval Proxy

- Navigation: **NavBar > Menu > Enterprise Components > Delegation > Administer Create Delegation**


- Enter parameters required eg Delegator or Proxy name, click on [Search](#).

Requests that are currently active have a request status of Accepted and delegation status of Active.

Requests that are in the future have a request status of Accepted or Submitted and delegation status of Active or Inactive.

< Process List
Administer Delegation

Administer Delegation

[Maintain Delegated Auth](#)
[Add Delegation Request](#)

Selection Criteria

Delegator

Proxy

Transaction Name

Start Date

End Date

Request Status

Delegation Status

3. A list of delegations will be displayed. Click on the [Request Details](#) tab for more information.

Search Results

Delegation Request
Request Details
»

	Description	Delegator	Delegator	Proxy	Delegate
<input type="checkbox"/>	Manager Absence Approve	SS_U		SS_U	
<input type="checkbox"/>	Request Leave of Absence	SS_U		SS_U	
<input type="checkbox"/>	Request Leave of Absence	SS_U		SS_U	
<input type="checkbox"/>	Timesheet Approvals	SS_U		SS_U	

4. Select the checkbox corresponding to the delegation you wish to revoke.

Search Results

Delegation Request
Request Details
»

	Description	Delegator	Delegator	Proxy	Delegate
<input style="border: 2px solid red;" type="checkbox"/>	Manager Absence Approve	SS_U		SS_U	
<input type="checkbox"/>	Request Leave of Absence	SS_U		SS_U	
<input type="checkbox"/>	Request Leave of Absence	SS_U		SS_U	
<input type="checkbox"/>	Timesheet Approvals	SS_U		SS_U	

5. Click the **Revoke** button

Search Results

[Delegation Request](#) | **Request Details** ||▶

	Start Date	End Date	Request Status
<input checked="" type="checkbox"/>	02/08/2022	17/08/2022	Submitted
<input checked="" type="checkbox"/>	02/08/2022	17/08/2022	Submitted
<input checked="" type="checkbox"/>	02/08/2022	17/08/2022	Submitted
<input checked="" type="checkbox"/>	02/08/2022	17/08/2022	Submitted

6. The revoke delegation confirmation page appears.

Are you sure you want to revoke the selected delegations?

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 the delegator.

What happens when I delegate approval authority to someone?

When you delegate approval authority to a proxy, this person can act on delegator's behalf to approve pending transactions. The proxy will be notified of pending transactions (just as the delegator 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 the delegator's 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.