ANU Delegations Administration Inquiry and Reporting

Version: 1
Version date: 11/04/2017
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(ANU) delegations inquiry and reporting

Within the HRMS, there exists a number of different areas where you can inquire (ANU) delegations. The delegations can be held at position level, by a particular individual i.e. a staff member or a Visitor and Honorary Appointee (shortened as VaHA), also known as Person of Interest (POI) in the HRMS.

This guide shows you the navigation paths that will take you to those areas, the meaning of different input parameters and the resultant data displayed on each of those pages.

We will first look at the delegations that are assigned to a position.

1   Look up delegation using position info page

If you have access to menu *Position Management >> Maintain Positions >> Add/Update Position Info*, you will find two tabs *Delegation Assignment* and *Delegation Holders* (exist within menu item *Add/Update Position Info*) where basic information about delegation assignment are recorded.

Step 1 - Navigate to *Main Menu > Organisational Development > Position Management > Add/Update Position Info*

Add/Update Position Info

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value	Add a New Value

▼ Search Criteria

Position Number: begins with ▼
Description: begins with ▼
Position Status: = ▼
Business Unit: begins with ▼ 🔍
Department: begins with ▼ 🔍
Job Code: begins with ▼ 🔍
Reports To Position Number: begins with ▼

☐ Include History ☐ Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

Find an Existing Value | Add a New Value

Step 2 - If you know the position number that you wish to inquire, enter it in **Position Number** field. Alternatively, use another search criteria or a combination of search criteria such as **Reports To Position Number** and **Department**.

TIP: in entering the position number, you can skip the preceding zero's. For example, for position 00007601, you can enter 7601.

Click *Search*.

Result: system displays **Description** tab first. In the example, the first row in the position historical stack has a *29/03/2017* effective date. This date is when the data conversion occurred, to transition from old delegation version to new/current delegation version. This row indicated that the position has delegations assigned to it.

Step 3- Click **Delegation Assignment** tab to view the delegation contained within the position.

The screen capture shows that the position has 3 profiles of *ASSOCDEAN*, *DA* and *D8*. There is no individual delegation assigned to the position.

Step 4- Click **Delegation Holders** tab to view the current delegate(s) of the position. In this example, there is only one position delegate.

* **Delegation From** date, in this case, is *29/03/2017* which is when the data conversion took place to transfer and transform data from the old design to the new design.
* **Delegation To** date, in this case, is none. It might mean that the occupant of the position is an ongoing staff member and has no pre-determined date to exit this position.
* **Position Incumbent Status**, in this case, is *Current*. It could mean that the occpant of the position is a permanent staff member and has no pre-determined date to exit this position. Other possible values of this field include: Substantive, or blank.

Step 3 - If you wish, click *Show History* button to open up the next page where the delegation contents will be displayed.
* Right arrow green button: click to open up the delegation contents of each profile.
* **As Of Date**: default to today's date; change to a different date to view the delegations held by the position as of that specific date.

Step 5 - Click **Return** to return to previous page.

Step 6 - Click **Return to Search** to return to search criteria page.

2 Look up all delegation holders of a position

For positions that hold (ANU) delegations, the occupants of the positions are the delegation holders. There are three types of position occupancy: substantive (principal, main, ongoing), temporary, and short-term acting. To find out who had held, currently hold or are going to hold the position delegations, use the *Position Delegates History* page.

* A former delegation holder has a **Delegation To** date in the past.
* A current delegation holder has a **Delegation From** date in the past or today's date and a blank or future-dated **Delegation To** date.
* A future delegation holder has a future-dated **Delegation From**.

The **Delegation Type** has two values:
* *Job/Position*: this value means the person inherits the delegations from the position she or he occupies in your job data.
* *Individually assigned*: this value means the person is granted the delegations held by the position he or she is acting in; the person does not occupy the position in his or her job data.

Step 1 - Navigate to *Main Menu > Organisational Development > Position Management > Review Positions/Delgation Info > Position Delegates History*

Position Delegates History

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Position Number:	begins with ▼	
Description:	begins with ▼	
Position Status:	= ▼	▼
Business Unit:	begins with ▼	🔍
Department:	begins with ▼	🔍
Job Code:	begins with ▼	🔍
Reports To Position Number:	begins with ▼	

☐ Case Sensitive

Search   Clear   Basic Search   🔍 Save Search Criteria

Step 2 - If you know the position number that you wish to inquire, enter it in **Position Number** field. Alternatively, use another search criteria or a combination of search criteria such as **Reports To Position Number** and **Department**.

Click *Search*.

Result: system displays all past, present and future position holders of the position being inquired. In this example, there is only one position delegate.

* **Delegation From** date, in this specific case, is 22/03/2017, which is when the data conversion, transitioning from the old design to the new design, took place.

Step 3 - If you wish, click **Details** button to open up the next page where the delegation contents will be displayed.
* Right arrow green button: click to open up the delegation contents of each profile.
* **As Of Date**: default to today's date; change to a different date to view the delegations held by the position as of that specific date.

Step 4 - Click *Return* to return to previous page.

Step 5 - Click *Return to Search* to return to search criteria page.

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3   Inquire position delegation information

This page has a variety of search criteria to help you find out who hold a specified delegation profile, or delegation clause and cluster, in one or multiple department ID's (you must have data access to those departments), at a particular date. You can also inquire by employee ID to find out if a particular staff member holds any delegation.

This page does not cater for VaHA delelegation holders.

Step 1 - Navigate to: *Main Menu > Organisational Development > Position Management > Review Position/Delgation Info > Position Delegation Inquiry*

Step 2 - In **Criteria** tab, enter your search criteria. In this example, the system-default date *11/04/2017* was left as is in **As of Date** field and *7601* was entered in **Position Number** field.

Step 3 - Click *Search*.

Result: the **Results** page and tab **Department & Position** is displayed:

Result: click tab **Delegate Details** to see who are the delegate holders as of 11/04/2017.

TIP: use this page if you want to find out if a staff member holds a particular delegation clause or profile as of a particular date.

4 Look up all position delegations held by an employee

Unlike Position Delegation Delegates page where you can look up past, present and future delegation holders for a particular position, this page allows you to find out all the past, present and future position delegations held by a staff member

This page does not cater for VaHA delelegation holders.

Step 1 - Navigate to: *Main Menu > Organisational Development > ANU Delegations > Employee Delegation Inquiry*

Step 2 - If you know the Employee ID of the staff member you wish to look up, enter the ID in **Empl ID** field. Alternatively, use another search criteria or a combination of search criteria such as **Last Name**, **First Name**, or **Position Number**.

Click *Search*.

Result: system displays all position delegations held by the staff member being inquired. In this example, the staff member holds delegations for one position. If she or he holds delegations for another position, the information will be on row 2 of the first blue ribbon.

Step 3 - If you wish, click green right arrow button to open up the delegation contents of each profile.

* **As Of Date**: system default to today's date; change to a different date to view the delegations held by the position, therefore by the staff member, as of that specified date.

Step 4 - Click *Return to Search* to return to search criteria page.

5   Inquire delegations held by a VaHA (POI)

This page has a variety of search criteria to help you find out which VaHA(s) hold a specified delegation profile, or delegation clause and cluster, in a one or multiple department ID's (you must have data access to those departments), at a particular date. You can also inquire by person ID to find out if a specified VaHA holds any delegation.

This page does not cater for position delelegation holders.

Step 1 - Navigate to: *Main Menu > Organisational Development > ANU Delegations > POI Delegation Inquiry*

Step 2 - In **Criteria** tab, enter your search criteria. In this example, system default date *11/04/2017* was left in the **As of Date** field and *198* was entered in the **Delegation ID** field.

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Step 3 - Click *Search*.
Result: in this case system does not find any VaHA delegation holder of 198.

Step 4: remove value in **Delegation ID** field, search again, this time use *BANDED/D6* profile.

Click *Search*.

Result: the **Results** page and tab **Department & POI Type** is displayed:

Result: click tab **Delegate Details** to see who are the delegate holders as of 11/04/2017.

7   Run ANU delegation report

Currently there is only one report provided for the ANU Delegations functionality. The Delegation & Extract report provides details of delegates, departments, delegations held.

Step 1 - Navigate to: *Main Menu > Organisational Development > Position Management > Delegation Reports > Delegation & Extract Report*

Step 2 - Complete the run control. The report can be run by:
  • A particular date (default is today's date)
  • An employee

- A position number
- A delegation ID
- A profile type and ID combo
- A category ID
- For all departments, one department of a range of departments that you have access. Normal department selection options should apply.

You must enter at least one field in the run control.

Step 3 - Click *Run*

TIP: ensure you have Web as *Type and PDF as *Format to achieve the right output files.

Step 4 - Click *OK*

Step 5 - Click **Process Monitor** to check on run status. When **Run Status** shows *Success* and **Distribution Status** shows *Posted*, you can collect your reports.

Result: There are 2 output files, one is in CSV format and one is in PDF output. To collect files, click **Report Manager** link at the top of your page.

Step 6 - Download files to view:

Delegation Extract & Report

Page:	**1 of 362**
Run Date/Time:	**11/04/2017 22:01:40**
Report ID:	ANUDLG01
Operator:	U5651346
Instance:	4138931

Report Parameters:

As of Date:	11/04/2017		Profile Type:	BANDED
Position Number:			Profile ID:	D8
Employee ID:			Category ID:	
Delegation ID:				
Department: 61600	School of Art and Design			

Name	**Position**	**Start Date**	**End Date**	**Profile**
Lindsay,Honor	00028284	29/03/2017	31/12/2019	D8

Delegation		**Cluster**		**Legis**
000165	Approve casual sessional academic payments			
000166	Approve casual timesheets for general staff			
000175	Staff under the direction of a nominated supervisor	1	Staff under the direction of a nominated supervisor	
000182	Approve transfers of general and academic staff			
000183	Paid leave, including purchased leave and LWOP for periods of less than 12 months	1	Paid leave, including purchased leave and LWOP for periods of less than 12 months	
000220	Up to $5,000	1	Up to $5,000	

Name	**Position**	**Start Date**	**End Date**	**Profile**
Gentle,George	00028556	29/03/2017	31/12/2017	D8

EMPLID	EMPL_RCD	NAME	POSITION_NBR	POSN_DESCR	ANU_PROFILE_TYPE	ANU_PROFILE_ID	ANU_DELEGATION_ID	DESCR254	DESCRSHORT	SEQ_NUM	ANU_CLUS
1000001	0	Member,Staff One	28284	Associate Professor (Level D)	BANDED	D8	165	Approve casual sessional academic payments	CasSess	0	
1000001	0	Member,Staff One	28284	Associate Professor (Level D)	BANDED	D8	166	Approve casual timesheets for general staff	Timesheet	0	
1000001	0	Member,Staff One	28284	Associate Professor (Level D)	BANDED	D8	175	Staff under the direction of a nominated supervisor	Increment	1	Staff under supervisor
1000001	0	Member,Staff One	28284	Associate Professor (Level D)	BANDED	D8	182	Approve transfers of general and academic staff	ApprTrans	0	
1000001	0	Member,Staff One	28284	Associate Professor (Level D)	BANDED	D8	183	Paid leave, including purchased leave and LWOP for periods of less than 12 months	Appr Leave	1	Paid leave, and LWOP months
1000001	0	Member,Staff One	28284	Associate Professor (Level D)	BANDED	D8	220	Up to $5,000	Auth Purc	1	Up to $5,00

END OF GUIDE