

ANU Delegations Administration Inquiry and Reporting

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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 ▼	<input type="text"/>
Description:	begins with ▼	<input type="text"/>
Position Status:	= ▼	<input type="text"/>
Business Unit:	begins with ▼	<input type="text"/> 🔍
Department:	begins with ▼	<input type="text"/> 🔍
Job Code:	begins with ▼	<input type="text"/> 🔍
Reports To Position Number:	begins with ▼	<input type="text"/>

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.

Position Information

Position Number 00007601
Headcount Status Filled
Current Head Count 1 out of 1
*Effective Date 29/03/2017
Reason DCN V3 ANU delegation conversion
*Status Active
Action Date 29/03/2017
*Position Status Approved
Status Date 25/03/2002
Key Position

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

Delegation Contents

Effective Date 29/03/2017 Associate Professor
Status Active

Delegation Profiles

*Profile Type	*Profile ID	Delegations
ACAD	ASSOCDEAN	Associate Dean
ACAD	DA	Delegated Authority
BANDED	D8	Delegation Band 8

Individual Delegations

Delegation ID	Cluster	Description	Legislative
1			

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.



[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [Delegation Assignment](#) | **Delegation Holders**

Position Number 00007601 Associate Professor

Current Delegation Holders Personalise | Find | First 1 of 1 Last

Position Incumbent Status	Empl ID	Empl Record	Name	Delegation From	Delegation To	Show History
1 Current	1234567	1	Lindsay,Honor	29/03/2017		Show History

[Save](#) | [Return to Search](#) | [Notify](#) | [Add](#) | [Update/Display](#) | [Include History](#) | [Correct History](#)

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [Delegation Assignment](#) | [Delegation Holders](#)

- * **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 occupant 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.

Delegation Holder Information

Empl ID: 1234567 Lindsay,Honor

Empl Record: 1 Senior Fellow (Level D)

Find | View All | First 1 of 1 Last

Delegation From: 29/03/2017 To: Delegation Type: Job/Position

Position Number: 00007601 Associate Professor

Department: 40401 Aust Demographic & Social Inst

As Of Date: 11/04/2017

Delegation Profiles Find | First 1-3 of 3 Last

Profile Type	Profile ID	Delegations
ACAD	ASSOCDEAN Associate Dean	▶
ACAD	DA Delegated Authority	▶
BANDED	D8 Delegation Band 8	▶

Individual Delegations Find | View All | First 1 of 1 Last

Delegation ID	Cluster	Description	Legislative
1			<input type="checkbox"/>

[Return](#)

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 ▼	<input type="text"/>
Description:	begins with ▼	<input type="text"/>
Position Status:	= ▼	<input type="text"/>
Business Unit:	begins with ▼	<input type="text"/> 🔍
Department:	begins with ▼	<input type="text"/> 🔍
Job Code:	begins with ▼	<input type="text"/> 🔍
Reports To Position Number:	begins with ▼	<input type="text"/>

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.

Position Delegates History

Position Number 00007601 Associate Professor

Delegation Holders			Personalise Find	First 1 of 1 Last	
Emp ID	Empl Record	Name	Delegation From	Delegation To	Details
1 1234567	1	Lindsay,Honor	22/03/2017		Details

[Return to Search](#) [Notify](#)

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.

Delegation Holder Information

Empl ID: 1234567 Lindsay,Honor
Empl Record: 1

Delegation From: 22/03/2017 To: Delegation Type: **Job/Position**
Position Number: 00007601 Associate Professor
As Of Date: **11/04/2017**

Delegation Profiles			Find	First 1-3 of 3 Last
Profile Type	Profile ID	Delegations		
ACAD	ASSOCDEAN Associate Dean			
ACAD	DA Delegated Authority			
BANDED	D6 Delegation Band 6			

Individual Delegations			Find View All	First 1 of 1 Last
Delegation ID	Cluster	Description	Legislative	
1			<input type="checkbox"/>	

[Return](#)

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

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



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 delegation holders.

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

Criteria Results

Position Delegation Inquiry

Enter search criteria below to display the delegations.

*As of Date: 11/04/2017 [calendar icon] Search

Empl ID: [input] [magnifying glass icon]

Position Number: [input] Associate Professor

Profile Type: [input] [magnifying glass icon]

Profile ID: [input] [magnifying glass icon]

Delegation ID: [input] [magnifying glass icon] Legislative?

Department Selection

Delete All Search by Dept Tree

Personalise | Find | View All | [print icon] [calendar icon] First 1 of 1 Last

*Department	Description		
1 [magnifying glass icon]		[+]	[-]

Notify

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:



Criteria **Results**

Position Delegation Enquiry - Results

Click 'Criteria' tab to perform another inquiry

As of Date: 11/04/2017
Position Number: 00007601 Associate Professor

Personalise | Find | View All | First 1-3 of 3 Last

Department & Position | Delegate Details

Department	Dept Description	Position Number	Position Description
1 40401	Aust Demographic & Social Inst	00007601	Associate Professor
2 40401	Aust Demographic & Social Inst	00007601	Associate Professor
3 40401	Aust Demographic & Social Inst	00007601	Associate Professor

Notify

Criteria | Results

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

Criteria **Results**

Position Delegation Enquiry - Results

Click 'Criteria' tab to perform another inquiry

As of Date: 11/04/2017
Position Number: 00007601 Associate Professor

Personalise | Find | View All | First 1-3 of 3 Last

Department & Position | **Delegate Details**

Empl ID	Empl Rcd	Name	From	To	Profile Type	Profile ID	Profile Description	Delegation ID	Cluster	Description
1	1234567	Lindsay,Honor	22/03/2017		ACAD	ASSOCDEAN	Associate Dean			
2	1234567	Lindsay,Honor	22/03/2017		ACAD	DA	Delegated Authority			
3	1234567	Lindsay,Honor	22/03/2017		BANDED	D6	Delegation Band 6			

Notify

Criteria | Results

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 delegation holders.

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



Employee Delegation History

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

[Find an Existing Value](#)

▼ Search Criteria

Empl ID:

Empl Record:

Last Name:

First Name:

Payroll Status:

Position Number:

[Basic Search](#)

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.

Employee Delegation Inquiry

Empl ID: 1234567 Lindsay,Honor
Empl Record: 1 Senior Fellow (Level D)

Find | View All **First 1 of 1 Last**

Delegation From: 29/03/2017 To: Delegation Type: Job/Position
Position Number: 00007601 Associate Professor
Department: 40401 Aust Demographic & Social Inst
As Of Date: 11/04/2017

Delegation Profiles

Find First 1-3 of 3 Last

Profile Type	Profile ID	Delegations
ACAD	ASSOCDEAN Associate Dean	▶
ACAD	DA Delegated Authority	▶
BANDED	D8 Delegation Band 8	▶

Individual Delegations

Find | View All | 1 of 1 Last

Delegation ID	Cluster	Description	Legislative
1			<input type="checkbox"/>

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.

Employee Delegation Inquiry

Empl ID: 1234567 Lindsay,Honor
Empl Record: 1 Senior Fellow (Level D)

Delegation From: 29/03/2017 To: Delegation Type: Job/Position
Position Number: 00007601 Associate Professor
Department: 40401 Aust Demographic & Social Inst
As Of Date: 11/04/2017

Delegation Profiles

Profile Type	Profile ID	Delegations
ACAD	ASSOCDEAN Associate Dean	▶
ACAD	DA Delegated Authority	▶
BANDED	D8 Delegation Band 8	▶

Individual Delegations

Delegation ID	Cluster	Description	Legislative
1			<input type="checkbox"/>

Return to Search Previous in List Next in List Notify

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 delegation holders.

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



Criteria Results

POI Delegation Inquiry

Enter search criteria below to display the delegations.

*As of Date

Person ID

Profile Type

Profile ID

Delegation ID Legislative?

Department Selection

Personalise | Find | View All | | First 1 of 1 Last

	*Department	Description		
1	<input type="text"/> <input type="button" value="Search"/>		<input type="button" value="+"/>	<input type="button" value="-"/>

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.



Criteria Results

POI Delegation Inquiry

Enter search criteria below to display the delegations.

*As of Date: 11/04/2017

Person ID:

Profile Type:

Profile ID:

Delegation ID: 000198 Legislative?

Approve overseas travel in accordance with current travel advice and University policy (travel advice refers to DFAT's four levels of risk category assigned to overseas countries)

Search

Department Selection

Delete All Search by Dept Tree

Personalise | Find | View All | | First 1 of 1 Last

*Department	Description
1 <input type="text"/>	

Notify

Step 3 - Click *Search*.

Result: in this case system does not find any VaHA delegation holder of 198.



Criteria Results

POI Delegation Inquiry

Enter search criteria below to display the delegations.

*As of Date: 11/04/2017

Person ID:

Profile Type:

Profile ID:

Delegation ID: 000198 Legislative?

Approve overseas travel in accordance with current travel advice and University policy (travel advice refers to DFAT's four levels of risk category assigned to overseas countries)

Department Selection

Personalise | Find | View All |

First 1 of 1 Last

*Department	Description		
1 <input type="text"/>		<input type="button" value="+"/>	<input type="button" value="-"/>

The query returns no results.

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:



Criteria Results

POI Delegation Inquiry - Results

Click 'Criteria' tab to perform another inquiry

As of Date: 11/04/2017
 Profile Type: BANDED Banded Delegations
 Profile ID: D8 Delegation Band 8

Personalise | Find | View All | First 1-30 of 30 Last

Department & POI Type	Delegate Details	POI Type	POI Type Description
1 FSES	FennerSchoolEnviro&Society	00009	Student
2 FSES	FennerSchoolEnviro&Society	00009	Student
3 30510	Fenner School of Environ & Soc	00009	Student
4 30510	Fenner School of Environ & Soc	00009	Student
5 30200	Fenner Teaching & Learning	00009	Student
6 30200	Fenner Teaching & Learning	00009	Student
7 71020	Expenditure	00009	Student
8 21010	Corporate Govern & Risk Office	00014	Academic Visitor
9 71020	Expenditure	00009	Student

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

Criteria Results

POI Delegation Inquiry - Results

Click 'Criteria' tab to perform another inquiry

As of Date: 11/04/2017
 Profile Type: BANDED Banded Delegations
 Profile ID: D8 Delegation Band 8

Personalise | Find | View All | First 1-30 of 30 Last

Person ID	Name	From	To	Profile Type	Profile ID	Profile Description	Delegation ID	Cluster	Cluster Description
1 1234568	Lim,Sally	29/03/2017	01/01/2018	BANDED	D8	Delegation Band 8			
2 1234569	Ng,Hanh	29/03/2017	01/01/2018	BANDED	D8	Delegation Band 8			
3 1234570	Vincent,Mark	29/03/2017	01/03/2018	BANDED	D8	Delegation Band 8			
4 1234571	Saville,Tim	29/03/2017	01/03/2018	BANDED	D8	Delegation Band 8			
5 1234572	Margot,Bella	29/03/2017	01/03/2018	BANDED	D8	Delegation Band 8			
6 1234573	Hayford, Lee	29/03/2017	01/03/2018	BANDED	D8	Delegation Band 8			
7 1234574	Gentle,George	29/03/2017	26/02/2018	BANDED	D8	Delegation Band 8			

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.

Delegation Extract & Report

Run Control ID: 1 Report Manager Process Monitor **Run**

As of Date: 07/04/2017

Position Number:

Empl ID:

Delegation ID:

Profile Type: BANDED Banded Delegations

Profile ID: D3 Delegation Band 3

Category ID:

Department Selection

Delete All **Search by Dept Tree**

Personalise | Find | View All | First ◀ 1 of 1 ▶ Last

*Department	Description		
1 <input type="text"/>			

Save **Return to Search** **Notify** **Add** **Update/Display**

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



Delegation Extract & Report

Run Control ID: 1 Report Manager Process Monitor Run

As of Date: 11/04/2017 31

Position Number: 🔍

Empl ID: 🔍

Delegation ID: 🔍

Profile Type: **BANDED** 🔍 Banded Delegations

Profile ID: **D8** 🔍 Delegation Band 8

Category ID: 🔍

Department Selection

Delete All Search by Dept Tree

Personalise | Find | View All | | | First 1 of 1 Last

*Department	Description		
1	<input type="text"/> 🔍	<input type="button" value="+"/>	<input type="button" value="-"/>

Step 3 - Click *Run*

Process Scheduler Request

User ID U5651346 Run Control ID 1

Server Name Run Date 11/04/2017 31

Recurrence Run Time 21:58:49 Reset to Current Date/Time

Time Zone 🔍

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Delegation Extract & Report	ANUDLG01	BI Publisher	Web	PDF	Distribution

OK Cancel

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.



Process List							Personalise	Find	View All	First	1-2 of 2	Last
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details			
<input type="checkbox"/>	4138931		BI Publisher	ANUDLG01	U5651346	11/04/2017 21:58:49 AEST	Success	Posted	Details			

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.

Report Manager

Search Criteria

User ID: Instance: To File Type:

Last: Days Process Type: Name:

Personalise							Find	View All	First	1-2 of 2	Last
	Name	Creation DTTM	Instance	Process Type	Name	Size					
1	<input type="checkbox"/> ANUDLG01.pdf	11/04/2017 22:01	4138931	XML Publisher	ANUDLG01	750069					
2	<input type="checkbox"/> ANUDLG014138931.csv	11/04/2017 22:01	4138931	XML Publisher	ANUDLG01	947320					

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
 Position Number:
 Employee ID:
 Delegation ID:

Profile Type: BANDED
 Profile ID: D8
 Category ID:

Department: 61600 School of Art and Design

Name	Position	Start Date	End Date	Profile	Cluster	Legis
Lindsay,Honor	00028284	29/03/2017	31/12/2019	D8		
Delegation						
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						
Gentle,George	00028556	29/03/2017	31/12/2017	D8		



EMPLID	EMPL_RCD	NAME	POSITION_NBR	POSN_DESCR	ANU_PROFI LE_TYPE	ANU_PRO FILE_ID	ANU_DELEG ATION_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 \$5,000

END OF GUIDE