Delegation

Delegation is the act of granting another member of the organization authority over a group of employees (an assignment group) when the typically assigned person is not available. For example, a manager going on vacation for a week can delegate authority over his or her employees to another manager to ensure timesheets are reviewed and approved in his or her absence.

A user can delegate an assignment group and grant the delegation recipient his or her role or, in some cases, a lower role to define the delegation recipient's access to the group. When delegating, the owner can delegate only those roles that are at or below the owner's role for the group. For example, someone with manager role for a group cannot delegate the Administrator role to others.

When you delegate responsibility for an assignment group to another user, you can only delegate the set of responsibilities associated with your own user role, and optionally "lower" roles in the user role hierarchy.

Roles which can be delegated will be defined as follows:

| Role	Roles which can be delegated
Timekeeper	Timekeeper
Manager	Manager
Display and Reporting	None, cannot delegate
Grant Administrator	None, cannot delegate
Leave Administrator	None, cannot delegate
Payroll Administrator	None, cannot delegate
System Administrator	None, cannot delegate
Superuser	None, cannot delegate
Delegator	All

To delegate roles:

1. On the Home Screen, select **Settings > Manage Delegations.**

   The **Manage Delegations** window appears.
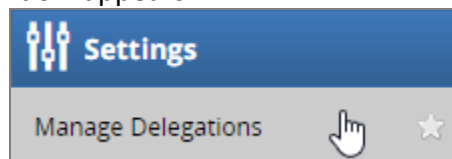
2. Click **Delegate Authority**. The **Enter Search Criteria** window appears which lets you search for one or more assignment groups.
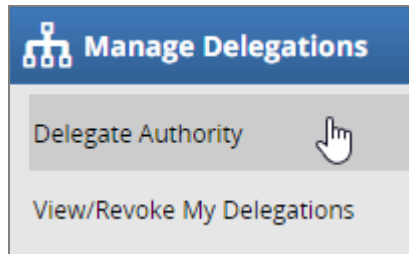
3. Enter your search criteria. You can enter a character string and/or the wildcard character (*) to retrieve a list of groups matching the characters you enter.
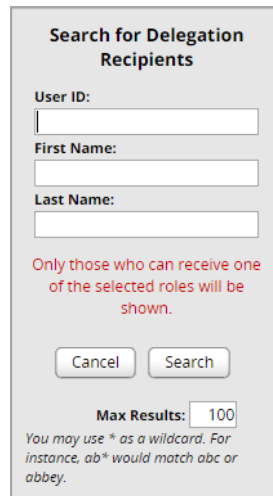
4. Click **Search**. A window lists the assignment groups matching your search, along with the roles you are granted for each group.

5. For each assignment group being delegated, choose your delegation options.

- In the **Assignment Group** column, select the checkbox next to the assignment group name.
- In the **Role to Delegate** column, use the drop-down menu to select the roles to be delegated for the assignment group.
- In the **Effective Date** and **End Effective Date** columns, enter the dates during which the assignment group roles will be delegated.

    - **Effective Date** defaults to today.
    - **End Effective Date** defaults to one week from today. To make a delegation permanent, enter an **End Effective Date** of 12/31/3000.
    - If you are delegating many groups and entering many dates, you can omit the slashes. The system will insert them for you as you exit the date fields.

6. Click **Next** to display a search window for selecting the user who will be delegated that assignment group.
7. In the search window, enter your search criteria. You can also use a character string, the wildcard character (*), or a combination to retrieve a list of users matching the characters you enter. If you are including a wildcard, use the **Max Results** field to limit the number of displayed records.
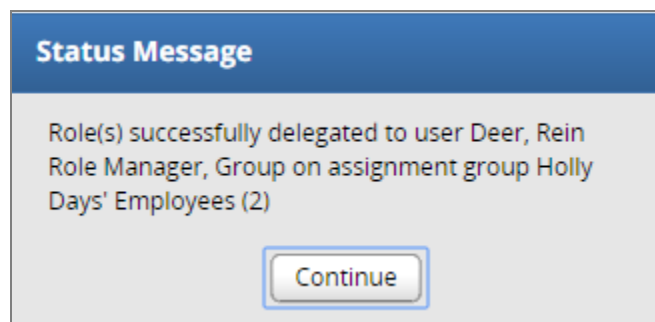

8. Click **Search**. A window appears with the results of the search.

9. Select a delegate.

10. Click **Select**. A confirmation message appears that indicates a successful delegation.

> *Note*: *If any delegations fail, a status message appears listing the unsuccessful delegations and why they failed. For example, a delegation could fail because the assignment group is already delegated to the selected delegate.*

11. Click **Continue** to return to the **Manage Delegations** window.

Cancelling or Revoking a Delegated Role

Once an owner has delegated a role, that owner can also cancel the delegation.

1. On the Home Screen, select **Settings > Manage Delegations**.
2. In the **Manage Delegations** dialog box, click **View/Revoke Delegations**.
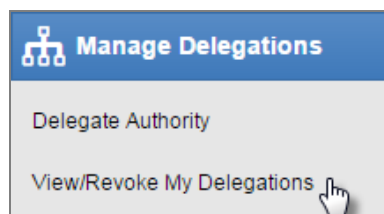
The **Enter Search Criteria** window appears.

Enter Search Criteria

Group Description:

First Name:

Last Name:

User ID:

As Of Date:

MM/dd/yyyy

Cancel   Search

*You may use * as a wildcard. For instance, ab* would match abc or abbey.*

3. Enter your search criteria.

A window appears that lists the roles currently delegated within your assignment groups, along with your role for each group.

Assignment Group	Recipient	Effective Date	End Effective Date	Delegated Role	Role After Delegation	My Current Role	Actions
Holly Days' Employees	Deer, Rein	12/21/2016	12/28/2016	Manager, Group	Manager, Group	Manager, Group	Revoke

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*If an assignment group contains more than one delegated role, click the **Expand Group** button displayed next to the **Assignment Group** name to see all of the delegated roles.*

4. In the **Actions** column, select the delegation to be cancelled.
5. Selecting **Revoke** cancels only the delegation appearing in a single row.
6. Selecting **Revoke All** (if shown) cancels all delegations for that assignment group.

Actions

Revoke

Revoke

A new window appears listing the delegated right to be cancelled.

7. Choose the date on which the revocation is to be in effect or select the **Revoke Immediate** checkbox.

8. Click **Revoke Delegations** to proceed with the cancellation.

A message appears verifying the cancelled delegation.