Managers can delegate their holiday request authorisations, sickness management responsibilities, timesheets management responsibilities and authorisation and planners to another individual, such as a team member or a manager at the next level. Delegations can be open ended with no restrictions, for each occasion the manager is on annual leave, or for a fixed period.

**What information can I delegate?**

There are currently 6 types of delegations that can be set up:
1) Holiday Request Authorisations - accepting or rejecting leave
2) Sickness management responsibilities – inputting sickness for an employee
3) Holiday Request Planner Responsibilities – viewing individual planners with holiday entitlement
4) Peer Planner Responsibilities – viewing individual and group planners
5) Timesheets Responsibilities – submitting details of hours and making budget code recharges
6) Timesheets Authorisation – authorising or rejecting timesheets

**How to view the delegated module(s):**

1) **Holiday Request Authorisations**
   - Click on 'Delegated Responsibilities/Authorities'
   - Under the Authorisations heading, any holiday requests awaiting a reply will be shown (if none, the Authorisation section will be empty) – outstanding holiday requests will also be shown on the MyHR menu page
   - Click on the line showing the person’s holiday request
   - Scroll to the bottom of the planner screen to view the request form
   - Review the details and click on either Authorise or Reject to respond – if rejecting, please input a reason

2) **Sickness management responsibilities**
   - Click on 'Delegated Responsibilities/Authorities'
   - Under the Responsibilities heading, click on Sickness Notifications
   - Click on the person’s name to view their sickness summary
   - Scroll to the bottom of the sickness summary screen and click [Notify Sickness] if you would like to input an occasion of sickness
3) Holiday Request Planner Responsibilities
- Click on 'Delegated Responsibilities/Authorities'
- Under the Responsibilities heading, click on Holiday Request
- Click on the person’s name to view their planner, which includes their entitlement

4) Peer Planner Responsibilities
- Click on 'Delegated Responsibilities/Authorities'
- Under the Responsibilities heading, click Peer Planner

5) Timesheets Authorisations
- Click on 'Delegated Responsibilities/Authorities'
- Under the Authorisations heading, click on an employee’s timesheet to open it to authorise or reject

6) Timesheets Responsibilities
- Click on 'Delegated Responsibilities/Authorities'
- Under the Responsibilities heading, click on Timesheets

- To view an individual person’s planner, click on person’s name
- To view the group planner, click on Select All - this will show a planner for either the manager’s direct reports or whole team (depending on which option has been delegated), including sickness
## Setting up a delegation rule

### Type of delegation

<table>
<thead>
<tr>
<th>Type of Delegation</th>
<th>Instruction Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday Request Authorisations</td>
<td>4 - 11</td>
</tr>
<tr>
<td>Sickness management responsibilities</td>
<td>12 - 19</td>
</tr>
<tr>
<td>Peer Planner &amp; Holiday Request Planner responsibilities</td>
<td>20 - 26</td>
</tr>
<tr>
<td>Timesheets Authorisations</td>
<td>27 - 34</td>
</tr>
<tr>
<td>Timesheets Responsibilities</td>
<td>35 - 42</td>
</tr>
</tbody>
</table>
1) Holiday Request Authorisations

1. From the main menu, click on either: a) Delegation or b) Manager View then module of Delegation of authority/responsibility:

   a) Delegation
   Delegate your role to another

   b-i) Manager View
   Click to manage your team

b-ii) Manager Summary
The team below are a list of staff that should report to you. If you feel that this is incorrect or there is missing data then please contact the HR Systems team on hr-systems@qmul.ac.uk

Checking the box next to a person's name enables you to select a module from the list to the right, such as sickness notifications.

Please note that all leave requests that come to you for authorisation will be escalated after 10 days of inactivity to your next manager in the chain.

Authorisations: 0

Team[Select All][Deselect All]

Note: If a holiday request authorisation delegation is not set up, pending authorisations will be escalated after 10 days.
2. Select [Add New]:

**Delegation of authority/responsibility**

The delegation of authority and responsibility module enables line managers to delegate responsibilities and authorisations to another individual. This is typically a member of your team, or your manager at the next level. For example, a line manager may be going on holiday and wants to delegate all holiday authorisations to employee A while they are away.

<table>
<thead>
<tr>
<th>Delegation</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Add New]</td>
</tr>
</tbody>
</table>

3. Complete the delegation form:

   a) Select **Authorisation**

**Delegation of authority/responsibility**

The delegation of authority and responsibility module enables line managers to delegate responsibilities and authorisations to another individual. This is typically a member of your team, or your manager at the next level. For example, a line manager may be going on holiday and wants to delegate all holiday authorisations to employee A while they are away.

<table>
<thead>
<tr>
<th>New Rule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Type</td>
</tr>
</tbody>
</table>

   b) Input **Description**, eg Holiday Authorisation delegation to <Employee A>

**Description**

Holiday request delegation to Alastair Bayliss
c) In **Delegate To**, click [Search] in order to specify person to be delegated to:

**Delegate To**

![Advanced Search](image)

**Delegation of authority/responsibility**

- **Surname:** [bayliss]
- **First Name:** [alastair]
- **Known As:**
- **Previous Surname:**
- **Employee Number:**
- **Direct Reports Only:**

**Please complete search criteria entry, use [Search] to retrieve matching employee data**

**Select:** BAYLISS, ALASTAIR

**Employee Number:**

**Location:** MILE END

**Please make your selection from the search results to [Continue], or amend the search criteria and perform a new [Search]**

**Click [Continue]**

The **Delegate To** field will now be populated:

**Delegate To**

![Delegate To populated](image)
d) In Delegate For, click [ Select ] in order to specify persons you wish to delegate the leave requests for:

Select the appropriate Option then click [ Continue ]:

i. People Individually – select this option if you wish to tick individuals to delegate leave requests for and do not wish to include everyone in the delegation; this list will need to be manually updated when staff leave and new staff start.

ii. Direct Reports – select this option if you wish to delegate leave requests for the line manager's direct reports only; this list will be automatically updated.

iii. Whole Team – select this option if you wish to delegate leave request for the line manager's whole team (this will include all line managers that report to you and their teams, including other line managers); this list will be automatically updated.

Delegation of authority/responsibility

<table>
<thead>
<tr>
<th>Select Option</th>
<th>People Individually</th>
<th>Direct Reports</th>
<th>Whole Team</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>☑</td>
<td>☑</td>
<td></td>
</tr>
</tbody>
</table>

[ Select All ] [ Deselect All ]

NB: If you select the option of People Individually, you will need to tick the boxes for the individuals that you wish to delegate.
The Delegate For field will now be populated:

e) In Module/Process Group, click [Select], tick Holiday Request and Peer Planner then click [Continue]:

Module/Process Group *

Delegation of authority/responsibility

The delegation of authority and responsibility module enables line managers to delegate responsibilities and authorisations to another individual. This is typically a member of your team, or your manager at the next level. For example, a line manager may be going on holiday and wants to delegate all holiday authorisations to employee A while they are away.

By ticking Peer Planner, the person who you have delegated to will be able to view an individual’s planner when a leave request from them is pending but not when it has been approved.

If you would like the person who you have delegated to see the planner the rest of the time (ie not just when a leave request is pending), you will need to delegate the responsibility of the Holiday Request planner as well. (See instructions for Peer Planner & Holiday Request Planner responsibilities from page 17.)

The Module/Process Group field will now be populated:
f) Select, or input, today’s date in **From Date**:  
   
   ![Click icon to show calendar]

```
Delegation Period

From Date: 31/03/2011
```


g) Select, or input, end date in **To Date** if required – leave blank if you wish for the delegation to be continuous:  
   
   ![Click icon to show calendar]

```
To Date:
```


h) To delegate when line manager is absent only (eg when on annual leave), tick **Absence** – do not tick if you wish for the delegation to be continuous and not restricted to absence:  

```
Absence
```


i) To turn off your annual leave request notifications for those delegated, tick **Suppress Authorisation & Emails**:  

```
Suppress Authorisation & Emails
```


j) Check that you have correctly completed the form – here is an example showing direct reports, without an end date and for periods of absence only:
### Delegation of authority/responsibility

#### Rule Details
- **Rule Type**: Authority
- **Description**: Holiday request delegation to Alan Bayliss
- **Delegated To**: Alan Bayliss
- **Delegate For**: Direct Reports of HR Manager - Information & Systems

#### Delegation Period
- **From Date**: 31/03/2011
- **To Date**: 
- **Absence**: 
- **Suppress Authorisation & Emails**: 

---

**Holiday Request Authorisation Delegation of Authority and Responsibility guide March 2016**
k) To finish click **[ Save ]**. You will receive a confirmation message:

**Confirmation Message**
Successfully created your delegation record

l) You will then be returned to the Delegation screen, which lists the delegation rules:

**Delegation of authority/responsibility**
The delegation of authority and responsibility module enables line managers to delegate responsibilities and authorisations to another individual. This is typically a member of your team, or your manager at the next level. For example, a line manager may be going on holiday and wants to delegate all holiday authorisations to employee A while they are away.

<table>
<thead>
<tr>
<th>Delegation</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
<td><strong>Delegated to</strong></td>
</tr>
<tr>
<td>A</td>
<td>ALASTAIR BAYLISS</td>
</tr>
</tbody>
</table>

**Shows delegation rules that you have set up**

<table>
<thead>
<tr>
<th>Delegated rules</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Type</strong></td>
<td><strong>Delegated from</strong></td>
</tr>
</tbody>
</table>

**Shows modules that have been delegated to you**
2) Sickness management responsibilities

1. From the main menu, click on either: a) Delegation or b) Manager View then module of Delegation of authority/responsibility:

<table>
<thead>
<tr>
<th>Delegation</th>
<th>Manager View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delegate your role to another</td>
<td>Click to manage your team</td>
</tr>
</tbody>
</table>

**Manager Summary**

The team below are a list of staff that should report to you. If you feel that this is incorrect or there is missing data then please contact the HR Systems team on hr-systems@qmul.ac.uk

Checking the box next to a persons name enables you to select a module from the list to the right, such as sickness notifications.

Please note that all leave requests that come to you for authorisation will be escalated after 10 days of inactivity to your next manager in the chain.

<table>
<thead>
<tr>
<th>Authorisations: 0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team</td>
</tr>
<tr>
<td>Select All</td>
</tr>
<tr>
<td>Deselect All</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

Sickness Management Responsibilities Delegation of Authority and Responsibility guide March 2016 12 / 43
2. Select [ Add New ]:

Delegation of authority/responsibility
The delegation of authority and responsibility module enables line managers to delegate responsibilities and authorisations to another individual. This is typically a member of your team, or your manager at the next level. For example, a line manager may be going on holiday and wants to delegate all holiday authorisations to employee A while they are away.

3. Complete the delegation form:

a) Select Responsibilities

Delegation of authority/responsibility
The delegation of authority and responsibility module enables line managers to delegate responsibilities and authorisations to another individual. This is typically a member of your team, or your manager at the next level. For example, a line manager may be going on holiday and wants to delegate all holiday authorisations to employee A while they are away.

b) Input Description, eg Sickness inputting delegation to <Employee A>

Description *
Sickness inputting delegation to Alastair Bayliss

b) Input Description, eg Sickness inputting delegation to <Employee A>

Description *
Sickness inputting delegation to Alastair Bayliss

b) Input Description, eg Sickness inputting delegation to <Employee A>

Description *
Sickness inputting delegation to Alastair Bayliss

b) Input Description, eg Sickness inputting delegation to <Employee A>

Description *
Sickness inputting delegation to Alastair Bayliss
The Delegate To field will now be populated:

```
Delegate To* ALASTAIR BAYLISS
```

**d) In Delegate For, click [Select] in order to specify persons you wish to delegate the leave requests for:**

```
Delegate For*
```

**Search for person to be delegated to**
Select the appropriate **Option** then click [**Continue**]:

i. **People Individually** – select this option if you wish to tick individuals to delegate leave requests for and do not wish to include everyone in the delegation; **this list will need to be manually updated when staff leave and new staff start**

ii. **Direct Reports** – select this option if you wish to delegate leave requests for the line manager’s direct reports only; this list will be automatically updated

iii. **Whole Team** – select this option if you wish to delegate leave request for the line manager’s whole team (this will include all line managers that report to you and their teams, including other line managers); this list will be automatically updated

---

**Delegation of authority/responsibility**

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Employee Number</th>
<th>Post</th>
<th>Employee Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHRISTOPHER KEARNEY</td>
<td></td>
<td>HR MANAGER - INFORMATION &amp; SYSTEMS</td>
<td></td>
</tr>
<tr>
<td>JAMES MARSHALL</td>
<td></td>
<td>HR ANALYST, INFORMATION &amp; PROJECTS HR</td>
<td></td>
</tr>
<tr>
<td>ALASTAIR BAYLISS</td>
<td></td>
<td>HR ANALYST, SYSTEMS &amp; PROJECTS HR</td>
<td></td>
</tr>
<tr>
<td>TINA LACEY</td>
<td></td>
<td>HR ASSISTANT INFORMATION SYSTEMS HR</td>
<td></td>
</tr>
</tbody>
</table>

**NB:** If you select the option of People Individually, you will need to tick the boxes for the individuals that you wish to delegate.

The **Delegate For** field will now be populated: [**Delegate For**] Direct Reports of HR MANAGER - INFORMATION & SYSTEMS
Delegation of authority/responsibility

The delegation of authority and responsibility module enables line managers to delegate responsibilities and authorisations to another individual. This is typically a member of your team, or your manager at the next level. For example, a line manager may be going on holiday and wants to delegate all holiday authorisations to employee A while they are away.

Select the Modules and Process Groups that you wish to delegate.

- Click [ Select ]
- Tick Sickness Notifications
- Change from View Only to Submit
- Then click [ Continue ]

The Module/Process Group field will now be populated:

f) Select, or input, today’s date in From Date:

- Click icon to show calendar

To Date

- Click icon to show calendar
h) To delegate when line manager is absent only (eg when on annual leave), tick Absence – do not tick if you wish for the delegation to be continuous and not restricted to absence:

Absence □

i) Check that you have correctly completed the form – here is an example showing direct reports and without an end date:

**Delegation of authority/responsibility**

The delegation of authority and responsibility module enables line managers to delegate responsibilities and authorisations to another individual. This is typically a member of your team, or your manager at the next level. For example, a line manager may be going on holiday and wants to delegate all holiday authorisations to employee A while they are away.

<table>
<thead>
<tr>
<th>Edit Delegation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Type</td>
</tr>
<tr>
<td>Description</td>
</tr>
<tr>
<td>Delegate To</td>
</tr>
<tr>
<td>Delegate For</td>
</tr>
<tr>
<td>Module/Process Group</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Delegation Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>From</td>
</tr>
<tr>
<td>To</td>
</tr>
<tr>
<td>Absence</td>
</tr>
<tr>
<td>Suppress Authorisation &amp; Emails</td>
</tr>
</tbody>
</table>
j) To finish click [Save]. You will receive a confirmation message:

**Confirmation Message**
Successfully created your delegation record

k) You will then be returned to the Delegation screen, which lists the delegation rules:
### Delegation of authority/responsibility

The delegation of authority and responsibility module enables line managers to delegate responsibilities and authorisations to another individual. This is typically a member of your team, or your manager at the next level. For example, a line manager may be going on holiday and wants to delegate all holiday authorisations to employee A while they are away.

#### Delegation

<table>
<thead>
<tr>
<th>Type</th>
<th>Delegated to</th>
<th>From</th>
<th>To</th>
<th>Absence</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>ALASTAIR BAYLISS</td>
<td>31/03/2011</td>
<td>N</td>
<td>Holiday request delegation to Alastair Bayliss</td>
<td></td>
</tr>
<tr>
<td>R</td>
<td>ALASTAIR BAYLISS</td>
<td>31/03/2011</td>
<td>N</td>
<td>Sickness inputting delegation to Alastair Bayliss</td>
<td></td>
</tr>
</tbody>
</table>

### Delegated rules

<table>
<thead>
<tr>
<th>Type</th>
<th>Delegated from</th>
<th>From</th>
<th>To</th>
<th>Absence</th>
<th>Description</th>
</tr>
</thead>
</table>

**Shows delegation rules that you have set up**

**Shows modules that have been delegated to you**
3) Peer Planner & Holiday Request Planner responsibilities

1. From the main menu, click on either: a) Delegation or b) Manager View then module of Delegation of authority/responsibility:

   a)

   b-i) Delegation

   Delegate your role to another

   b-ii) Manager View

   Click to manage your team

   Manager Summary

   The team below are a list of staff that should report to you. If you feel that this is incorrect or there is missing data then please contact the HR Systems team on hr-systems@qmul.ac.uk

   Checking the box next to a persons name enables you to select a module from the list to the right, such as sickness notifications.

   Please note that all leave requests that come to you for authorisation will be escalated after 10 days of inactivity to your next manager in the chain.

   Authorisations: 0

   Team[Select All][Deselect All]
2. Select [Add New]:

**Delegate of authority/responsibility**
The delegation of authority and responsibility module enables line managers to delegate responsibilities and authorisations to another individual. This is typically a member of your team, or your manager at the next level. For example, a line manager may be going on holiday and wants to delegate all holiday authorisations to employee A while they are away.

<table>
<thead>
<tr>
<th>Delegation</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Add New]</td>
</tr>
</tbody>
</table>

3. Complete the delegation form:

a) Select **Responsibilities**

**Delegate of authority/responsibility**
The delegation of authority and responsibility module enables line managers to delegate responsibilities and authorisations to another individual. This is typically a member of your team, or your manager at the next level. For example, a line manager may be going on holiday and wants to delegate all holiday authorisations to employee A while they are away.

<table>
<thead>
<tr>
<th>New Rule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Type</td>
</tr>
<tr>
<td>□ Authorisation □ Responsibilities</td>
</tr>
</tbody>
</table>

b) Input **Description**, eg Responsibility of Planners delegation to <Employee A>

**Description**

| Responsibility of Planners delegation to Alastair Bayliss |


c) In **Delegate To**, click [Search] in order to specify person to be delegated to:
The Delegate To field will now be populated:

d) In Delegate For, click [Select] in order to specify persons you wish to delegate the leave requests for.
Select the appropriate Option then click [ Continue ]:

i. People Individually – select this option if you wish to tick individuals to delegate leave requests for and do not wish to include everyone in the delegation; this list will need to be manually updated when staff leave and new staff start.

ii. Direct Reports – select this option if you wish to delegate leave requests for the line manager’s direct reports only; this list will be automatically updated.

iii. Whole Team – select this option if you wish to delegate leave request for the line manager’s whole team (this will include all line managers that report to you and their teams, including other line managers); this list will be automatically updated.

NB: If you select the option of People Individually, you will need to tick the boxes for the individuals that you wish to delegate.

The Delegate For field will now be populated:
e) In Module/Process Group, click [ Select ], tick Holiday Request and Peer Planner (with View Only displayed) then click [ Continue ]:

```
Module/Process Group *

Select [ ] Holiday Request
Select [ ] Peer Planner

[ Select All ] [ Deselect All ] [ View Only ] [ Set All ]

Select the Modules and Process Groups that you wish to delegate.
[ Select All ] [ Deselect All ] [ View Only ] [ Set All ]
```

Delegation of authority/responsibility

The delegation of authority and responsibility module enables line managers to delegate responsibilities and authorisations to another individual. This is typically a member of your team, or your manager at the next level. For example, a line manager may be going on holiday and wants to delegate all holiday authorisations to employee A while they are away.

Select the Modules and Process Groups that you wish to delegate.

```
[ Select All ] [ Deselect All ] [ View Only ] [ Set All ]

Select, or input, today's date in From Date:
```

f) Select, or input, today's date in From Date:

```
From Date 31/03/2011
```

```
Click icon to show calendar
```

```
g) Select, or input, end date in To Date if required – leave blank if you wish for the delegation to be continuous:
```

```
To Date
```

```
Click icon to show calendar
```

Help with delegation (pdf)
h) To delegate when line manager is absent only (eg when on annual leave), tick **Absence** – do not tick if you wish for the delegation to be continuous and not restricted to absence:

Absence

i) Check that you have correctly completed the form – here is an example showing direct reports and without an end date:

### Delegation of authority/responsibility

The delegation of authority and responsibility module enables line managers to delegate responsibilities and authorisations to another individual. This is typically a member of your team, or your manager at the next level. For example, a line manager may be going on holiday and wants to delegate all holiday authorisations to employee A while they are away.

<table>
<thead>
<tr>
<th>Rule Type</th>
<th>Authorisation</th>
<th>Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td><strong>Responsibility of Planners delegation to Alastair Bayliss</strong></td>
<td></td>
</tr>
<tr>
<td>Delegate To</td>
<td><strong>ALASTAIR BAYLISS</strong></td>
<td></td>
</tr>
<tr>
<td>Delegate For</td>
<td><strong>Direct Reports of HR MANAGER - INFORMATION &amp; SYSTEMS</strong></td>
<td></td>
</tr>
<tr>
<td>Module/Process Group</td>
<td><strong>Holiday Request - View Only</strong></td>
<td><strong>Peer Planner - View Only</strong></td>
</tr>
</tbody>
</table>

### Delegation Period

<table>
<thead>
<tr>
<th>From</th>
<th>31/03/2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>To</td>
<td></td>
</tr>
<tr>
<td>Absence</td>
<td></td>
</tr>
<tr>
<td>Suppress Authorisation &amp; Emails</td>
<td></td>
</tr>
</tbody>
</table>
j) To finish click [Save]. You will receive a confirmation message:

**Confirmation Message**
Successfully created your delegation record

k) You will then be returned to the Delegation screen, which lists the delegation rules:

**Delegation of authority/responsibility**
The delegation of authority and responsibility module enables line managers to delegate responsibilities and authorisations to another individual. This is typically a member of your team, or your manager at the next level. For example, a line manager may be going on holiday and wants to delegate all holiday authorisations to employee A while they are away.

<table>
<thead>
<tr>
<th>Type</th>
<th>Delegated to</th>
<th>From</th>
<th>To</th>
<th>Absence</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>ALASTAIR BAYLISS</td>
<td>31/03/2011</td>
<td></td>
<td>N</td>
<td>Holiday request delegation to Alastair Bayliss</td>
</tr>
<tr>
<td>R</td>
<td>ALASTAIR BAYLISS</td>
<td>31/03/2011</td>
<td></td>
<td>N</td>
<td>Responsibility of Planners delegation to Alastair Bayliss</td>
</tr>
<tr>
<td>R</td>
<td>ALASTAIR BAYLISS</td>
<td>31/03/2011</td>
<td></td>
<td>N</td>
<td>Sickness inputting delegation to Alastair Bayliss</td>
</tr>
</tbody>
</table>

[Add New]

**Shows delegation rules that you have set up**

**Delegated rules**

<table>
<thead>
<tr>
<th>Type</th>
<th>Delegated from</th>
<th>From</th>
<th>To</th>
<th>Absence</th>
<th>Description</th>
</tr>
</thead>
</table>

[Help with delegation (pdf)]

**Shows modules that have been delegated to you**
4) Timesheets Authorisations

1. From the main menu, click on either: a) Delegation or b) Manager View then module of Delegation of authority/responsibility:

   a) Delegation
   Delegating your role to another

   b-i) Manager View
   Click to manage your team

Choose ‘Delegation of authority/responsibility’
2. Select [Add New]:

Delegation of authority/responsibility

The delegation of authority and responsibility module enables line managers to delegate responsibilities and authorisations to another individual. This is typically a member of your team, or your manager at the next level. For example, a line manager may be going on holiday and wants to delegate all holiday authorisations to employee A while they are away.

| Delegation | [Add New] |

3. Complete the delegation form:
   a) Select Authorisation
b) In Delegate To, click [Search] in order to specify person to be delegated to:

Delegate To * [Search]
The Delegate To field will now be populated:

<table>
<thead>
<tr>
<th>Rule Type *</th>
<th>Description *</th>
<th>Delegate To *</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Timesheets authorisation to Chris Kearney</td>
<td>CHRISTOPHER KEARNEY</td>
</tr>
</tbody>
</table>
d) In Delegate For, click [Select] in order to specify persons you wish to delegate the leave requests for:

Select the appropriate Option then click [Continue]:

i. People Individually – select this option if you wish to tick individuals to delegate leave requests for and do not wish to include everyone in the delegation; this list will need to be manually updated when staff leave and new staff start

ii. Direct Reports – select this option if you wish to delegate leave requests for the line manager’s direct reports only; this list will be automatically updated

iii. Whole Team – select this option if you wish to delegate leave request for the line manager’s whole team (this will include all line managers that report to you and their teams, including other line managers); this list will be automatically updated

NB: If you select the option of People Individually, you will need to tick the boxes for the individuals that you wish to delegate.
The Delegate For field will now be populated:

Delegation of authority/responsibility

Select the Modules and Process Groups that you wish to delegate.

[ Select All ] [ Deselect All ]
- Change Post Within Team
- Employee Changes
- Holiday Request
- Manager's View of Employee Details
- One-off Payments / Demonstrators
- Peer Planner
- Peer Review Nominations
- Process a Leaver
- Sickness Notifications
- Talent Succession Planning
- [ Timesheets ]
- Training Request

Module/Process Group:

In Module/Process Group, click [ Select ], tick Timesheets then click [ Continue ]:
The Module/Process Group field will now be populated:

f) Select, or input, today’s date in From Date:

<table>
<thead>
<tr>
<th>From Date</th>
<th>01/03/2016</th>
</tr>
</thead>
</table>

Click icon to show calendar

Delegation Period

Click icon to show calendar


g) Select, or input, end date in To Date if required – leave blank if you wish for the delegation to be continuous:

<table>
<thead>
<tr>
<th>To Date</th>
<th></th>
</tr>
</thead>
</table>

Click icon to show calendar

h) To delegate when line manager is absent only (eg when on annual leave), tick Absence – do not tick if you wish for the delegation to be continuous and not restricted to absence:

Absence


i) To turn off your annual leave request notifications for those delegated, tick Suppress Authorisation & Emails:

Suppress Authorisation & Emails


j) Check that you have correctly completed the form – here is an example showing direct reports, without an end date and for periods of absence only:
k) To finish click [Save]. You will receive a confirmation message: click [Continue]

**Confirmation Message**
Successfully created your delegation record

l) You will then be returned to the Delegation screen, which lists the delegation rules:

![Delegation of authority/responsibility screen](image)

- **Shows delegation rules that you have set up**
- **Shows modules that have been delegated to you**
5) Timesheets Responsibilities

From the main menu, click on either: a) **Delegation** or b) **Manager View** then module of **Delegation of authority/responsibility**:

- **Delegation**
  - Delegating your role to another

- **Manager View**
  - Click to manage your team

---

**Manager Summary**

The team below are a list of staff that should report to you. If you feel that this is incorrect or there is missing data then please contact your HR team:

- Checking the box next to a person's name enables you to select a module from the list to the right, such as sickness notifications.
- Please note that all leave requests that come to you for authorisation will be escalated after 10 days of inactivity to your next manager in the chain.

**Data Protection:** Logging in to MyHR as a manager can give you access to substantial amounts of personal data such as salaries, sickness records, etc. Therefore please ensure you:

- Comply with the GMUL Data Protection Policy
- Comply with the Data Protection Act 1998

You can read the guidance presentation here or click here for the full data protection guidelines.

---

**Choose ‘Delegation of authority/responsibility’**
5. Select [ Add New ]:

**Delegation of authority/responsibility**

The delegation of authority and responsibility module enables line managers to delegate responsibilities and authorisations to another individual. This is typically a member of your team, or your manager at the next level. For example, a line manager may be going on holiday and wants to delegate all holiday authorisations to employee A while they are away.

| Delegation | [ Add New ] |

6. Complete the delegation form:
   a. Select Responsibilities
Delegation of authority/responsibility

The delegation of authority and responsibility module enables line managers to delegate responsibilities and authorisations to another individual. This is typically a member of your team, or your manager at the next level. For example, a line manager may be going on holiday and wants to delegate all holiday authorisations to employee A while they are away.

<table>
<thead>
<tr>
<th>New Rule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Type *</td>
</tr>
<tr>
<td>Description *</td>
</tr>
</tbody>
</table>

b) In Delegate To, click [ Search ] in order to specify person to be delegated to:
7. The **Delegate To** field will now be populated:

- **Rule Type**: Authorisation
- **Description**: Timesheets - submission to Ashley Turner
- **Delegate To**: ASHLEY TURNER
d) In Delegate For, click [ Select ] in order to specify persons you wish to delegate the leave requests for:

Select the appropriate Option then click [ Continue ]:

i. People Individually – select this option if you wish to tick individuals to delegate leave requests for and do not wish to include everyone in the delegation; **this list will need to be manually updated when staff leave and new staff start**

ii. Direct Reports – select this option if you wish to delegate leave requests for the line manager’s direct reports only; this list will be automatically updated

iii. Whole Team – select this option if you wish to delegate leave request for the line manager’s whole team (this will include all line managers that report to you and their teams, including other line managers); this list will be automatically updated

NB: If you select the option of People Individually, you will need to tick the boxes for the individuals that you wish to delegate.
The Delegate For field will now be populated:

```
Delegate For * Direct Reports of NIGHT CLEANING MANAGER
```

e) In Module/Process Group, click [ Select ], tick Timesheets then click [ Continue ]:

```
Module/Process Group *
```

f) In Delegation of authority/responsibility, click [ Select ], tick Timesheets, choose Save & Submit then click [ Continue ]:

![Delegation of authority/responsibility]

The Module/Process Group field will now be populated:
f) Select, or input, today’s date in **From Date**:

<table>
<thead>
<tr>
<th>Delegation Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>From Date</td>
</tr>
<tr>
<td>01/03/2016</td>
</tr>
</tbody>
</table>

**Click icon to show calendar**


g) Select, or input, end date in **To Date** if required – leave blank if you wish for the delegation to be continuous:

<table>
<thead>
<tr>
<th>To Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

**Click icon to show calendar**

h) To delegate when line manager is absent only (eg when on annual leave), tick **Absence** – do not tick if you wish for the delegation to be continuous and not restricted to absence:

<table>
<thead>
<tr>
<th>Absence</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

i) To turn off your annual leave request notifications for those delegated, tick **Suppress Authorisation & Emails**:

<table>
<thead>
<tr>
<th>Suppress Authorisation &amp; Emails</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

j) Check that you have correctly completed the form – here is an example showing direct reports, without an end date and for periods of absence only:

![Delegation of authority/responsibility](image_url)
k) To finish click [Save]. You will receive a confirmation message: click [Continue]

**Confirmation Message**
Successfully created your delegation record

l) You will then be returned to the Delegation screen, which lists the delegation rules:

*Shows delegation rules that you have set up*

*Shows modules that have been delegated to you*
Viewing, amending and deleting a delegation rule

Delegation rules that you have created are listed in the Delegation section:

**Delegation of authority/responsibility**

The delegation of authority and responsibility module enables line managers to delegate responsibilities and authorisations to another individual. This is typically a member of your team, or your manager at the next level. For example, a line manager may be going on holiday and wants to delegate all holiday authorisations to employee A while they are away.

<table>
<thead>
<tr>
<th>Type</th>
<th>Delegated to</th>
<th>From</th>
<th>To</th>
<th>Absence</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>ALASTAIR BAYLISS</td>
<td>31/03/2011</td>
<td></td>
<td>N</td>
<td>Holiday request delegation to Alastair Bayliss</td>
</tr>
<tr>
<td>R</td>
<td>ALASTAIR BAYLISS</td>
<td>31/03/2011</td>
<td></td>
<td>N</td>
<td>Responsibility of Planners delegation to Alastair Bayliss</td>
</tr>
<tr>
<td>R</td>
<td>ALASTAIR BAYLISS</td>
<td>31/03/2011</td>
<td></td>
<td>N</td>
<td>Sickness inputting delegation to Alastair Bayliss</td>
</tr>
</tbody>
</table>

1. Click on the **Description**
2. Click [ **Edit** ]
3. Amend as required and then click [ **Save** ] or to delete, click [ **Delete** ]
4. A confirmation message will be displayed.
5. Click [ **Continue** ] to return to the Delegation of authority/responsibility module.