

MyView - User Guide

Setting up Delegations

Document: Manager MyView – Setting up Delegations

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Setting up Delegation Rules in MyView

If you plan to be out of the office on leave or for other purposes, Managers can delegate authorisations to another individual in the Business Unit. Authorisations or responsibilities cannot be delegated to anyone who does not have direct reports in “MyView”

ie. They must be a Manager.

If necessary, responsibility should be delegated to your Line Manager or another manager within your business unit.

Before setting up a delegation rule you should consider whether this is actually necessary or whether your team can wait for authorisation until you return to the office. You should be available to enter sickness as close to the date as possible though as this can impact on pay.

Your Line Manager is automatically set up to enter absence for your team when you are out of the office or not able. It is your responsibility to ensure that they are aware of when they need to do this on your behalf.

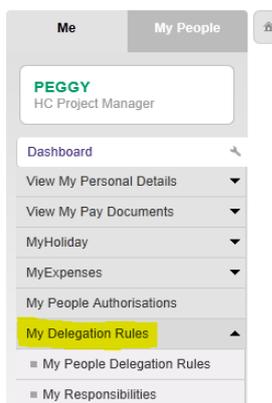
There are two types of delegation rule.

- 1) Authorisation – gives a delegate ability to authorise:
 - a. Expense claims
 - b. Holiday requests
- 2) Responsibilities – gives a delegate ability to enter:
 - a. Sickness and other absence

Setting up Delegations Rules

- From MyView dashboard (Main Menu) click on [My Delegation Rules]

Drop Down menu will appear



- Click on [My People Delegation Rules]

Delegation of Responsibility and Auth page will appear

Delegation of Responsibility And Auth

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This module is used as part of the delegation rules set up. This allows a Manager to select a peer or reportee to be delegate to receive and approved notifications from staff such as Holiday requests, Web Expense Claims, Sickness Notifications and Incidents.

Delegation

[Add New](#)

- Click on [Add New]

Delegation of Responsibility And Auth

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New Rule

Rule Type *	<input checked="" type="radio"/> Authorisation <input type="radio"/> Responsibilities
Description *	<input type="text"/>
Delegate To *	<input type="text"/> Search
Delegate For *	<input type="text"/> Select

- At [Rule Type] ensure that [Authorisation] is selected if you are delegating *expenses or holiday requests* or that [Responsibilities] is selected if you are delegating *absence notifications* – press tab key
- At [Description] enter the description of the delegated rule so that this can be easily identified – press Tab key

New Rule

Rule Type *	<input checked="" type="radio"/> Authorisation <input type="radio"/> Responsibilities
Description *	<input type="text" value="Expenses Delegation - Holiday Cover"/>

- At [Delegate to] click on [search]

Screen will appear

Delegation of Responsibility And Auth

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This module is used as part of the delegation rules set up. This allows a Manager to select a peer or reportee to be delegate to receive and approved notifications from staff such as Holiday requests, Web Expense Claims, Sickness Notifications and Incidents.

AdvancedSearch

Surname:	<input type="text"/>
First Name:	<input type="text"/>
Known As:	<input type="text"/>
Previous Surname:	<input type="text"/>
Employee Number:	<input type="text"/>
Direct Reports Only:	<input type="checkbox"/>

Please enter criteria to retrieve matching employee data

[Back](#)

- Enter known details of employee to whom tasks are to be delegated – click search

Employee info will appear

Select:

Name:

Employee Number:

Location:

HQ Chief Executives Office

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

Back

Search

Continue

- Click [continue]

Screen will appear

New Rule

Rule Type * Authorisation Responsibilities

Description * Expenses Delegation - Holiday Cover

Delegate To * MATT BAILEY

Delegate For *

Module/Process Group/View *

- At [Delegate For*] click on [Select]

Team list will appear

Delegation of Responsibility And Auth

Select Option People Individually Direct Reports Whole Team

Employee Name	Employee Number	Post
<input type="checkbox"/> ADRIAN MACALLISTER	[REDACTED]	Technical Business Analyst
<input type="checkbox"/> ALEXANDER WESTERTON	[REDACTED]	
<input type="checkbox"/> ALISTAIR STEVENSON	[REDACTED]	
<input type="checkbox"/> DANIELLA DAY-LEWIS	[REDACTED]	
<input type="checkbox"/> GEORGE MICHAEL	[REDACTED]	
<input type="checkbox"/> LISA MILLIGAN	[REDACTED]	

- Select employees individually or if you wish to delegate responsibility for all employees in your team select Whole Team
- Click [Continue]

Screen will appear

Delegation of Responsibility And Auth

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New Rule

Authorisation Responsibilities
 Description * Expenses Delegation - Holiday Cover
 Delegate To * Search
 Delegate For * Whole Team of HC Project Manager
 Module/Process Group/View *

- At [Module/Process Group/View* click on [Select]

Screen will appear

Delegation of Responsibility And Auth Setting Up Delegation Rules User Guide
 Select the Modules and Process Groups that you wish to delegate.

 Delegated Responsibilities
 Delegation of Responsibility And Auth
 Document View
 Expense Claims
 Holiday Request
 Other Absence
 Peer Review Nominations
 Sickness Notifications

- Select the process(es) that you wish to delegate
- Click [Continue]

This Screen will appear if you are delegating Expenses or Holiday Authorisations:

Delegation of Responsibility And Auth Setting Up Delegation Rules User Guide
 New Rule
 Rule Type * Authorisation Responsibilities
 Description * Expenses Delegation - Holiday Cover
 Delegate To * Search
 Delegate For * Whole Team of HC Project Manager
 Module/Process Group/View * Holiday Request
 Delegation Period
 From Date
 To Date
 Absence
 Suppress Authorisation & Emails

Or this screen if you are delegating responsibilities for Absence Notification:

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

<input type="checkbox"/> Document View:Web Expenses - Receipts	<input type="button" value="Save & Submit"/>
<input type="checkbox"/> Expense Claims	<input type="button" value="View Only"/>
<input type="checkbox"/> Holiday Request	<input type="button" value="View Only"/>
<input type="checkbox"/> Other Absence	<input type="button" value="View Only"/>
<input type="checkbox"/> Sickness Notifications	<input type="button" value="View Only"/>

- Select the relevant modules
- Instruction panel will change to editable mode

Sickness Notifications

At [View Only] click on drop down and choose [Save and Submit]

Sickness Notifications

- At [From Date] click on calendar and select the date you required the delegation rule to commence – press Tab key
- At [To Date] click on calendar and select the date you require the delegation rule to cease – *this can be left blank* – press Tab key
- At [Absence] ensure this is left blank– press Tab key
- At [Suppress Authorisation & Emails] ensure this is always left blank
- Click [Submit]

Confirmation message will appear



Confirmation Message
Successfully created your delegation record

Delegation rules will be detailed on screen

Type	Delegated to	From	To	Absence	Description
A		02/02/2016	02/02/2016	N	Expenses Delegation - Holiday Cover
R		02/02/2016	02/02/2016	N	Sickness notification - holiday cover