

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

1. Authorisation – gives a delegate ability to authorise Expense claims
2. Responsibilities – gives a delegate ability to enter Sickness Notifications and Paid/Unpaid Absence

Before setting up a delegation rule you should consider whether this is 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 as this can impact on pay.

Your Line Manager is automatically set up to enter Sickness Notification and Paid/Unpaid 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.

Setting up delegations rules

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

A drop down menu will appear



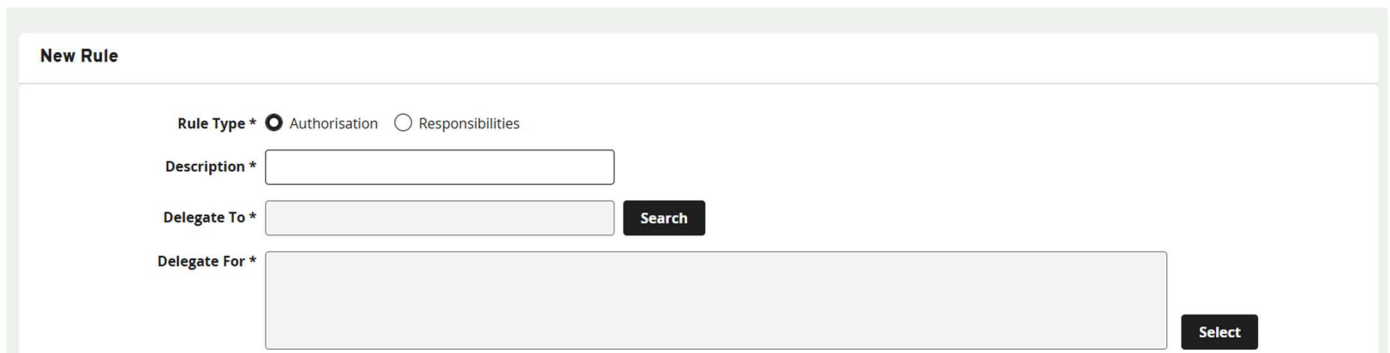
- Select [My People Delegation Rules]

Delegation of Responsibility and Auth page will appear



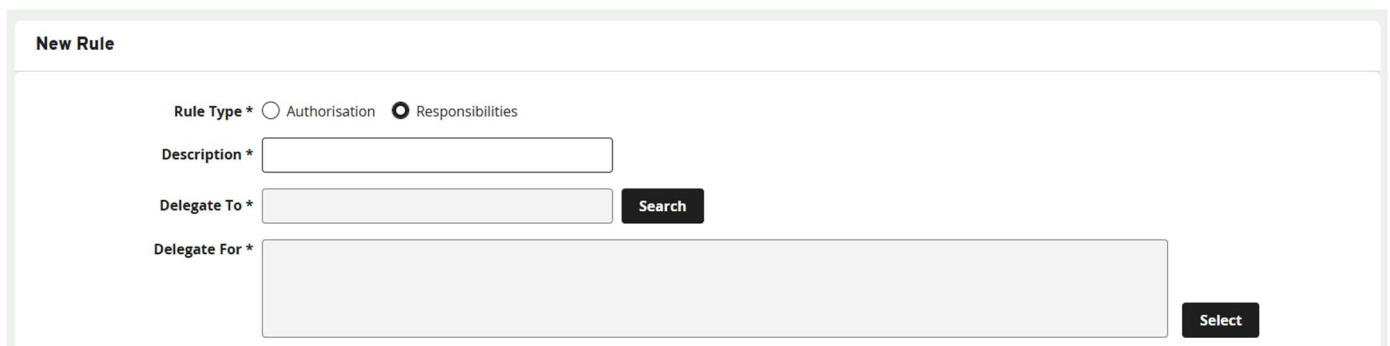
The screenshot shows a web interface titled "Delegation". In the top right corner, there is a dark button labeled "Add New".

- Select [Add New]
- At [Rule Type] ensure that [Authorisation] is selected if you are delegating *Expenses*



The screenshot shows the "New Rule" form. The "Rule Type" section has two radio buttons: "Authorisation" (which is selected) and "Responsibilities". Below this are three fields: "Description *" (a text input), "Delegate To *" (a dropdown menu with a "Search" button), and "Delegate For *" (a large dropdown menu with a "Select" button).

or that [Responsibilities] is selected if you are delegating *Sickness Notifications and Other Absence Paid/Unpaid Absence*



The screenshot shows the "New Rule" form. The "Rule Type" section has two radio buttons: "Authorisation" and "Responsibilities" (which is selected). Below this are three fields: "Description *" (a text input), "Delegate To *" (a dropdown menu with a "Search" button), and "Delegate For *" (a large dropdown menu with a "Select" button).

- At [Description] enter the description of the delegated rule so that this can be easily identified eg Expenses Delegation – Holiday Cover – press Tab key

New Rule

Rule Type * Authorisation Responsibilities

Description *

- At [Delegate to] select [search]
- Screen will appear

AdvancedSearch

Surname:

First Name:

Known As:

Previous Surname:

Employee Number:

Direct Reports Only:

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

Back Search

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

Employee info will appear

Select:	Name:	Employee Number:	Location:
<input checked="" type="radio"/>	[REDACTED]	[REDACTED]	[REDACTED]
<input type="radio"/>	[REDACTED]	[REDACTED]	[REDACTED]
<input type="radio"/>	[REDACTED]	[REDACTED]	[REDACTED]

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

Back Search Continue

- Select [continue]

Screen will appear

New Rule

Rule Type * Authorisation Responsibilities

Description *

Delegate To *

Delegate For *

- At [Delegate For*] select [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	<input type="text" value=""/>	Technical Business Analyst
<input type="checkbox"/> ALEXANDER WESTERTON	<input type="text" value=""/>	
<input type="checkbox"/> ALISTAIR STEVENSON	<input type="text" value=""/>	
<input type="checkbox"/> DANIELLA DAY-LEWIS	<input type="text" value=""/>	
<input type="checkbox"/> GEORGE MICHAEL	<input type="text" value=""/>	
<input type="checkbox"/> LISA MILLIGAN	<input type="text" value=""/>	

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

Screen will appear

New Rule

Rule Type * Authorisation Responsibilities

Description *

Delegate To *

Delegate For *

Module/Process Group/View *

- At [Module/Process Group/View* select [Select]

Screen will appear

Delegation of Responsibility And Auth

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

- Expense Claims
- Leave Management
- MyForm
- Other Absence
- Sickness Notifications
- T&A Timesheet Adjustments

- Select the processes that you wish to delegate eg Expense Claims (you cannot delegate Sickness Notifications and Other Absence Paid/Unpaid Absence if you selected Rule Type Authorisation)
- Select [Continue]

The following screen will appear if you are delegating Expenses:

Delegation of Responsibility And Auth

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New Rule

Rule Type * Authorisation Responsibilities

Description *

Delegate To *

Delegate For *

Module/Process Group/View *

If you selected Rule Type Responsibilities and are delegating **Responsibilities for Sickness Notifications and Other Absence Paid/Unpaid Absence** the following screen will appear.

For **expenses delegation** the next screen you will see is the delegation period this as shown on page 8.

Delegation of Responsibility And Auth

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

Document View:Web Expenses - Receipts

Expense Claims

MyForm

Other Absence

Sickness Notifications

- Select Other Absence and Sickness Notifications
- Instruction panel will change to editable mode

Other Absence

Sickness Notifications

At [View Only] select the drop down and choose [Save and Submit]

Other Absence

Save & Submit

Sickness Notifications

Save & Submit

➤ Click continue

Screen will appear

Delegation Period

From Date

To Date

Absence

Suppress Email And Authorisation

Submit

- 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 and closed at a later date* – press Tab key
- At [Absence] ensure this is left blank– press Tab key
- At [Suppress Email And Authorisation] ensure this is always left blank
- Select [Submit]

Confirmation message will appear

Confirmation Message
Successfully created your delegation record

Continue

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