

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” - 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.

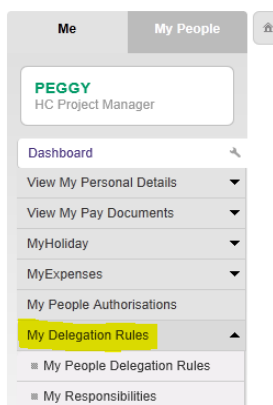
There are two types of delegation rule.

- 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) select [My Delegation Rules]

A drop down menu will appear



- Select [My People Delegation Rules]

Delegation of Responsibility and Auth page will appear

Delegation of Responsibility And Auth

[Setting Up Delegation Rules User Guide](#)

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](#)

- Select [Add New]

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.

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 *	Expenses Delegation - Holiday Cover

- At [Delegate to] select [search]

Screen will appear

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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 – select search

Employee info will appear

Select:

Name:

Employee Number:

Location:



[Redacted]

[Redacted]

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

- Select [continue]

Screen will appear

New Rule

Rule Type *

☒ Authorisation ☐ Responsibilities

Description *

Expenses Delegation - Holiday Cover

Delegate To *

MATT BAILEY

Search

Delegate For *

Select

Module/Process Group/View *

- At [Delegate For*] select [Select]

Team list will appear

Delegation of Responsibility And Auth

Select Option



People Individually



Direct Reports



Whole Team

Select All

Deselect All

Employee Name

Employee Number

Post

[Redacted]

[Redacted]

[Redacted]

☐ ADRIAN MACALLISTER

[Redacted]

Technical Business Analyst

☐ ALEXANDER WESTERTON

[Redacted]

☐ ALISTAIR STEVENSON

[Redacted]

☐ DANIELLA DAY-LEWIS

[Redacted]

☐ GEORGE MICHAEL

[Redacted]

☐ LISA MILLIGAN

[Redacted]

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

Screen will appear

Delegation of Responsibility And Auth

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New Rule

Rule Type *	<input checked="" type="radio"/> Authorisation <input type="radio"/> Responsibilities
Description *	Expenses Delegation - Holiday Cover
Delegate To *	<input type="text" value=""/> Search
Delegate For *	Whole Team of HC Project Manager
	Select
Module/Process Group/View *	
	Select

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

Screen will appear

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

[Select All](#) [Deselect All](#)

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

[Back](#) [Continue](#)

- Select the processes that you wish to delegate
- Select [Continue]

The following screen will appear if you are delegating Expenses or Holiday Authorisations:



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New Rule

Rule Type *	<input checked="" type="radio"/> Authorisation <input type="radio"/> Responsibilities
Description *	Expenses Delegation - Holiday Cover
Delegate To *	<input type="text" value=""/> Search
Delegate For *	Whole Team of HC Project Manager
	Select
Module/Process Group/View *	Holiday Request
	Select

Delegation Period

From Date	<input type="text"/> 
To Date	<input type="text"/> 
Absence	<input type="checkbox"/>
Suppress Authorisation & Emails	<input type="checkbox"/>

Or the following 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.

Select All
Deselect All
View Only
Set All

☐ Document View:Web Expenses - Receipts

Save & Submit

☐ Expense Claims

View Only

☐ Holiday Request

View Only

☐ Other Absence

View Only

☐ Sickness Notifications

View Only

Back
Continue

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

☒ Sickness Notifications

View Only


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

☒ Sickness Notifications

Save & 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* – press Tab key
- At [Absence] ensure this is left blank– press Tab key
- At [Suppress Authorisation & Emails] ensure this is always left blank
- Select [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