

# MyView - User Guide

## Setting up delegations

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**Author:** Payroll

## 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.

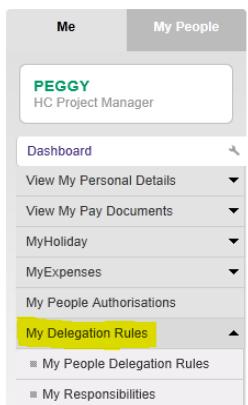
**Your Line Manager is automatically set up to enter absence for your team when you are out of the office or not able. It is your responsibility to ensure that they are aware of when they need to do this on your behalf.**

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

[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.

New Rule

Rule Type \*

Authorisation  Responsibilities

Description \*

[Search](#)

Delegate To \*

Delegate For \*

[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 \*

Authorisation  Responsibilities

Description \*

Expenses Delegation - Holiday Cover

- At [Delegate to] select [search]

Screen will appear

### Delegation of Responsibility And Auth

[Setting Up Delegation Rules User Guide](#)

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AdvancedSearch

Surname:   
 First Name:   
 Known As:   
 Previous Surname:   
 Employee Number:   
 Direct Reports Only:

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:                  |
| <input type="radio"/>  | <input type="text"/> | <input type="text"/> | HQ Chief Executives Office |
| <p>Please make your selection from the search results to [ Continue ], or amend the search criteria and perform a new [ Search ]</p> |                      |                      |                            |
| <input type="button" value="Back"/> <input type="button" value="Search"/> <input type="button" value="Continue"/>                    |                      |                      |                            |

- Select [continue]

Screen will appear

New Rule

|                                       |   |
|---------------------------------------|---|
| Rule Type *                           | <input checked="" type="radio"/> Authorisation <input type="radio"/> Responsibilities |
| Description *                         | Expenses Delegation - Holiday Cover   |
| Delegate To *                         | MATT BAILEY   |
| Delegate For *                        | <input type="text"/>  |
| Module/Process Group/View *           | <input type="text"/>  |
| <input type="button" value="Select"/> |   |

- 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                       |
|--|----------------------|----------------------------|
| REAGAN MCKEE                                 | 0000000001           | HR Project Manager         |
| <input type="checkbox"/> ADRIAN MACALLISTER  | <input type="text"/> | Technical Business Analyst |
| <input type="checkbox"/> ALEXANDER WESTERTON | <input type="text"/> |                            |
| <input type="checkbox"/> ALISTAIR STEVENSON  | <input type="text"/> |                            |
| <input type="checkbox"/> DANIELLA DAY-LEWIS  | <input type="text"/> |                            |
| <input type="checkbox"/> GEORGE MICHAEL      | <input type="text"/> |                            |
| <input type="checkbox"/> LISA MILLIGAN       | <input type="text"/> |                            |

- 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

[Setting Up Delegation Rules User Guide](#)

New Rule

Rule Type \*

Authorisation  Responsibilities

Description \*

Expenses Delegation - Holiday Cover

Delegate To \*

Whole Team of HC Project Manager

Delegate For \*

Search

Select

Module/Process Group/View \*

Select

- At [Module/Process Group/View\*] select [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.

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:

## Delegation of Responsibility And Auth

[Setting Up Delegation Rules User Guide](#)

New Rule

Rule Type \*

Authorisation  Responsibilities

Description \*

Expenses Delegation - Holiday Cover

Delegate To \*

Whole Team of HC Project Manager

Delegate For \*

Search

Select

Module/Process Group/View \*

Holiday Request

Select

Delegation Period

From Date

To Date

Absence

Suppress Authorisation & Emails

Or the following screen if you are delegating responsibilities for Absence Notification:

**Delegation of Responsibility And Auth**

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

|  |  |  |  |
|--|--|--|--|
| <input type="button" value="Select All"/>                      | <input type="button" value="Deselect All"/>      | <input type="button" value="View Only"/> | <input type="button" value="Set All"/> |
| <input type="checkbox"/> Document View:Web Expenses - Receipts | <input type="button" value="Save &amp; 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"/>         |  |  |

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

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

|  |  |
|--|--|
| <input checked="" type="checkbox"/> Sickness Notifications | <input type="button" value="View Only"/> |
|--|--|

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

|  |  |
|--|--|
| <input checked="" type="checkbox"/> Sickness Notifications | <input type="button" value="Save &amp; 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    | [REDACTED]   | 02/02/2016 | 02/02/2016 | N       | Expenses Delegation - Holiday Cover   |
| R    | [REDACTED]   | 02/02/2016 | 02/02/2016 | N       | Sickness notification - holiday cover |