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

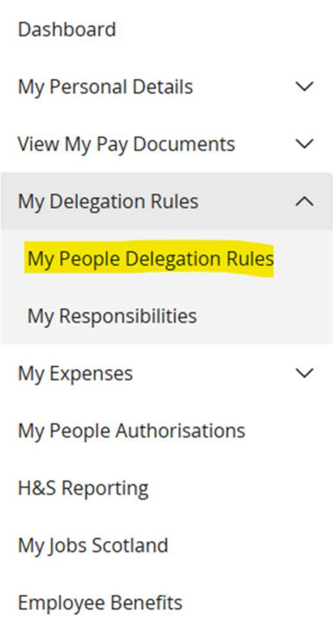
Before setting up a delegation rule you should consider whether this is necessary or whether your team can wait for authorisation until you return to the office. You should be available to enter sickness as close to the date as possible as this can impact on pay.

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

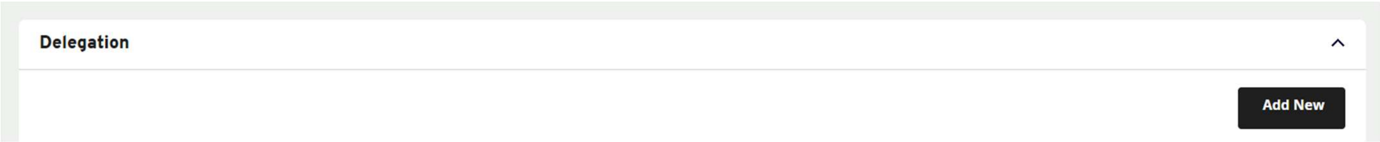
- From MyView dashboard (Main Menu) select [My Delegation Rules]

A drop down menu will appear



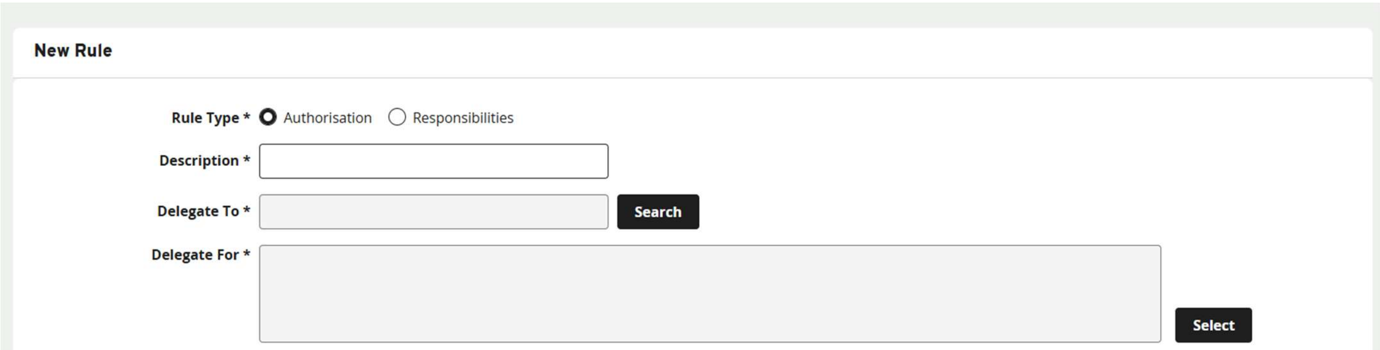
- ➢ Select [My People Delegation Rules]

Delegation of Responsibility and Auth page will appear

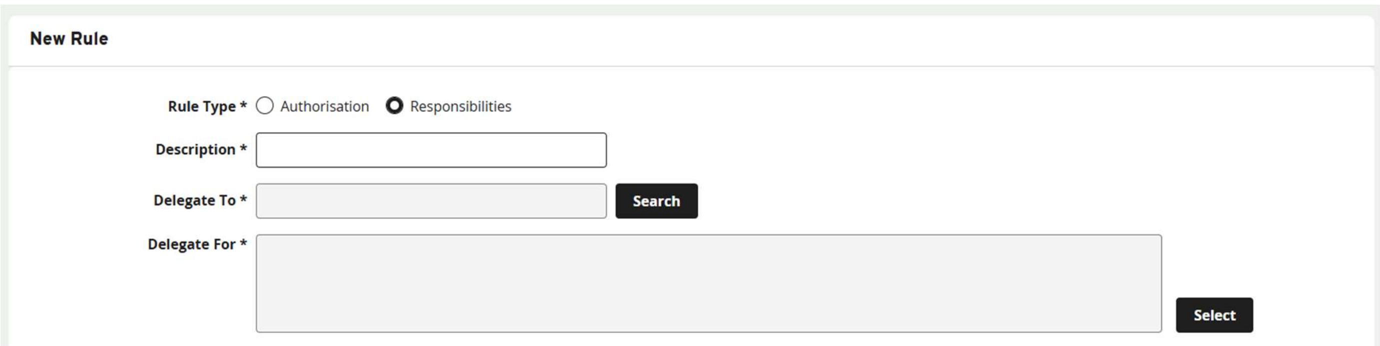


- ➢ Select [Add New]

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



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



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

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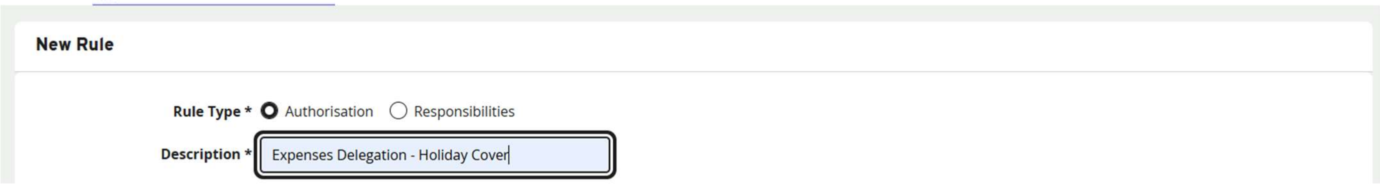
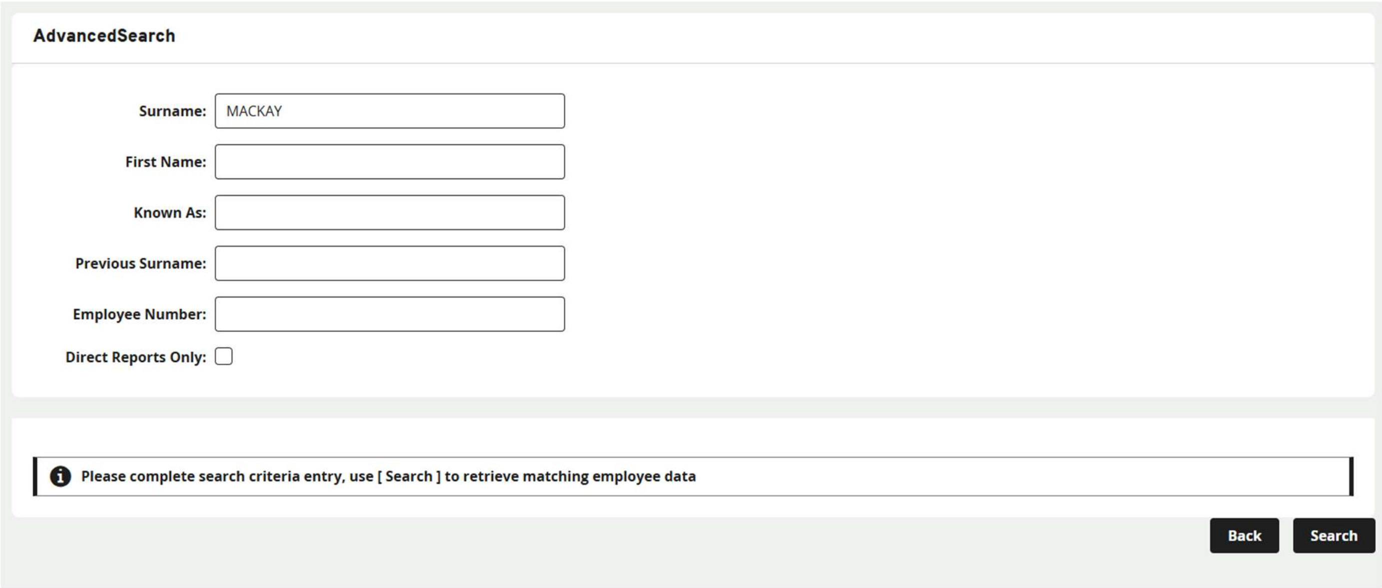
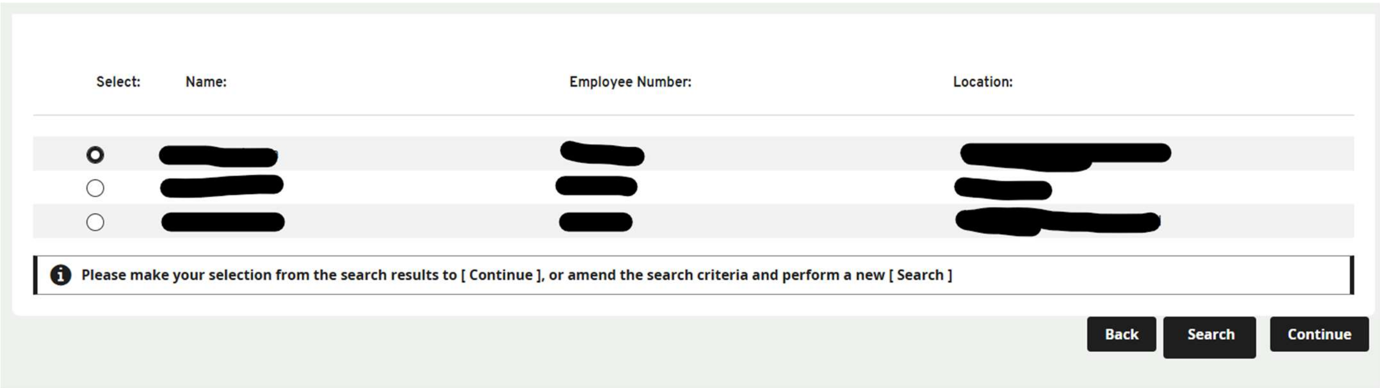


- At [Delegate to] select [search]
- Screen will appear



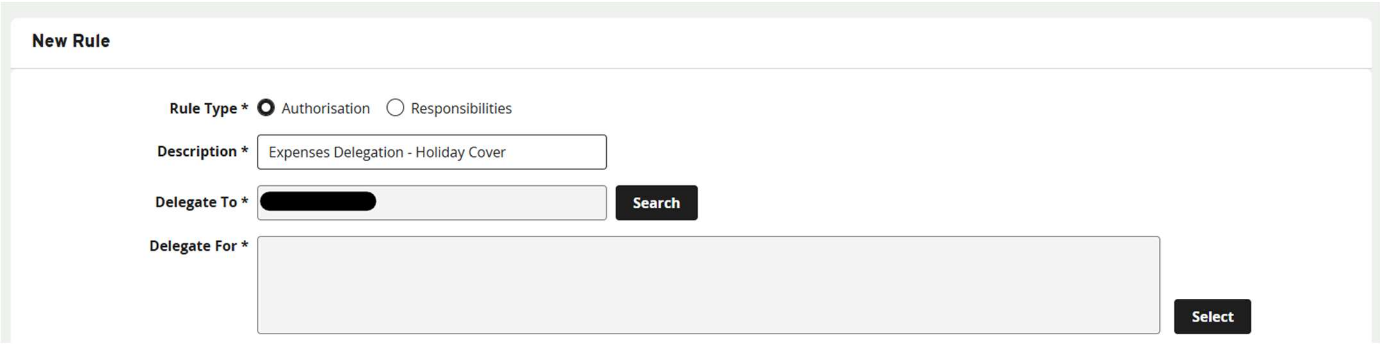
- Enter known details of employee to whom tasks are to be delegated – select search

Employee info will appear



➢ Select [continue]

Screen will appear



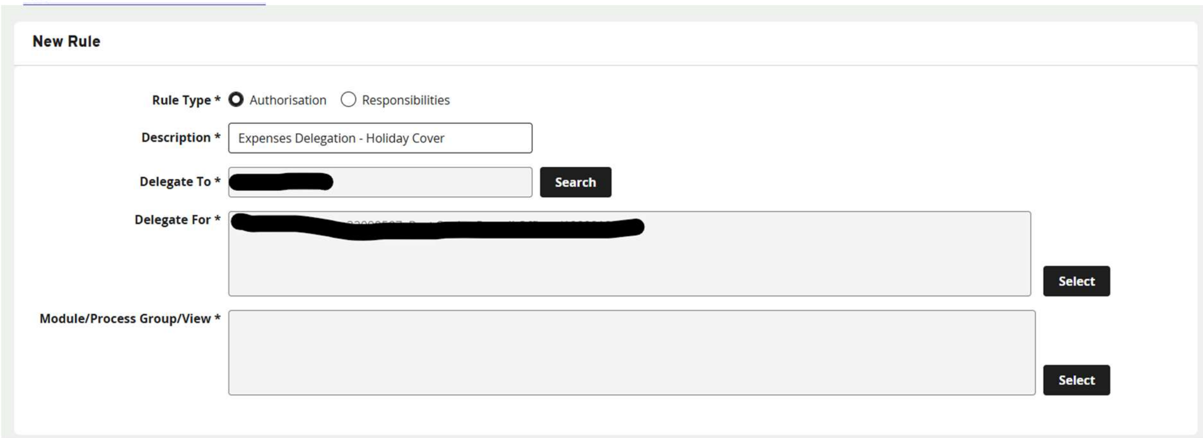
➢ At [Delegate For*] select [Select]

Team list will appear

➢ Select employees individually or if you wish to delegate all employees in your team select Whole Team

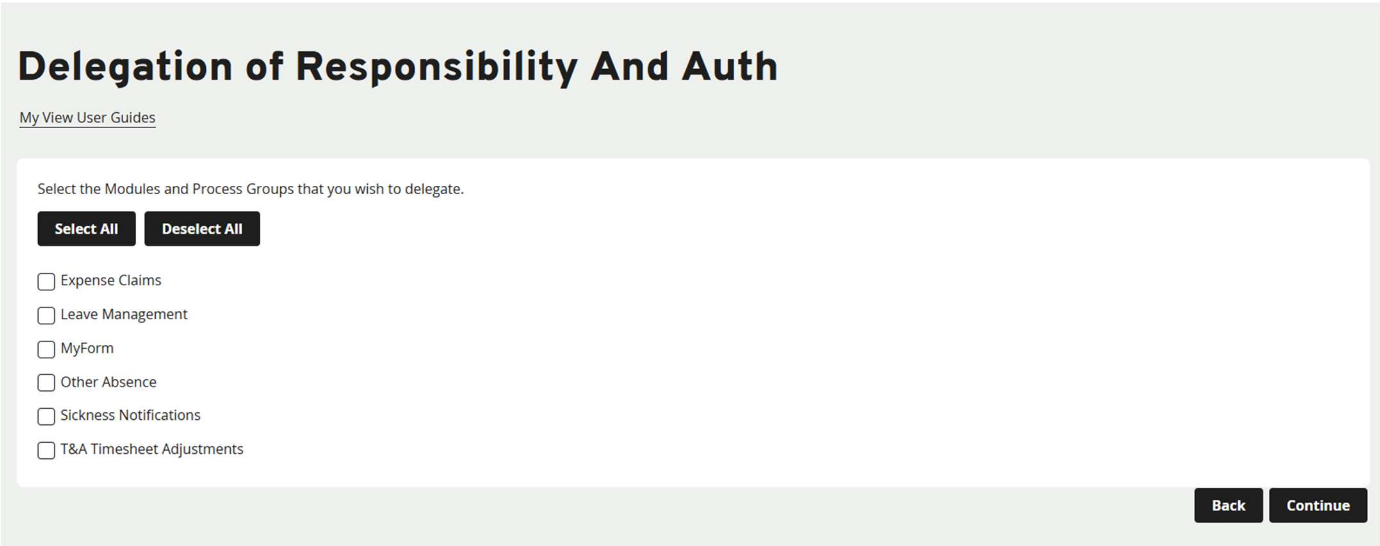
➢ Select [Continue]

Screen will appear



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

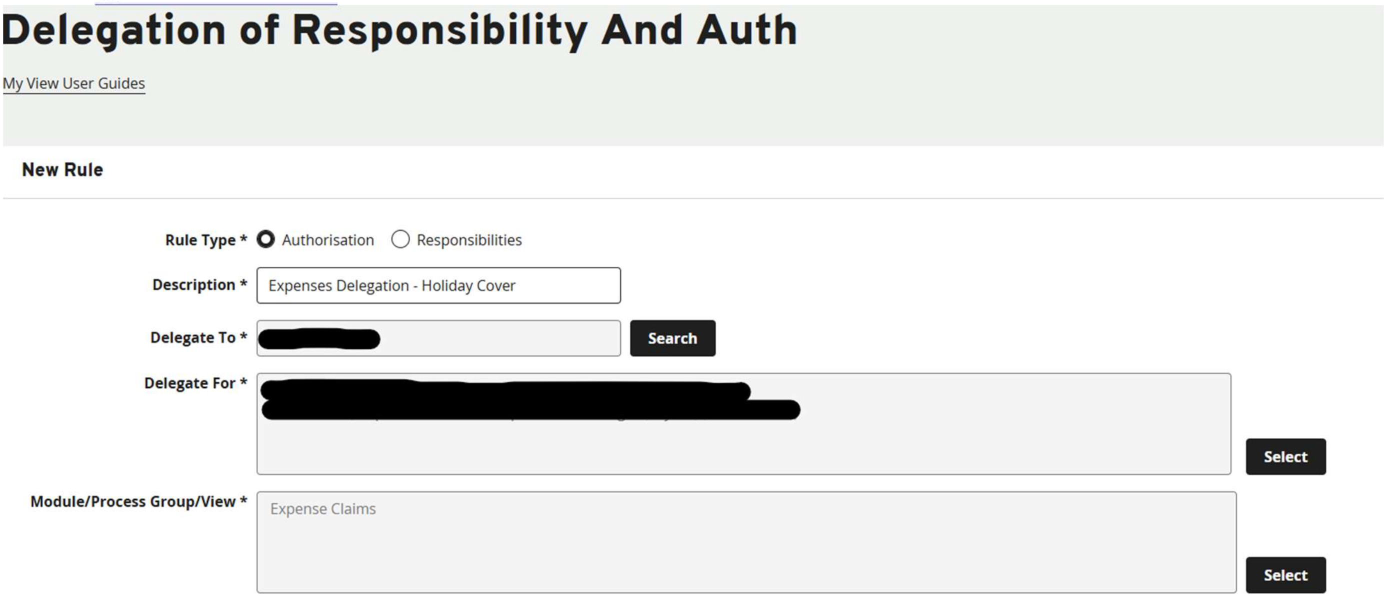
Screen will appear



➢ Select the processes that you wish to delegate eg Expense Claims (you cannot delegate Sickness Notifcations and Other Absence Paid/Unpaid Absence if you selected Rule Type Authorisation)

➢ Select [Continue]

The following screen will appear if you are delegating Expenses:



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

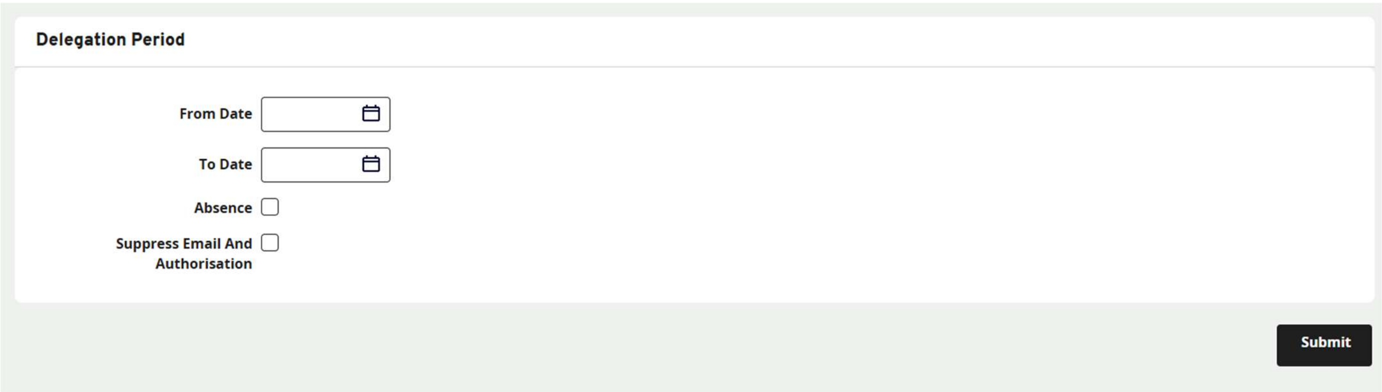
For **expenses delegation** the next screen you will see is the delegation period this as shown on page 8.

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

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

- Click continue

Screen will appear



- 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

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