

Manager Delegation

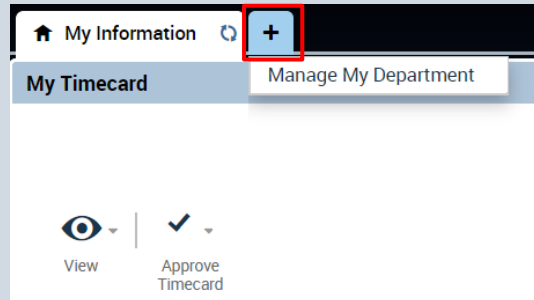
Purpose:

This job aid will help you delegate manager responsibilities. **This can be done when a supervisor is out, or when a timecard needs to be approved by multiple supervisors.**

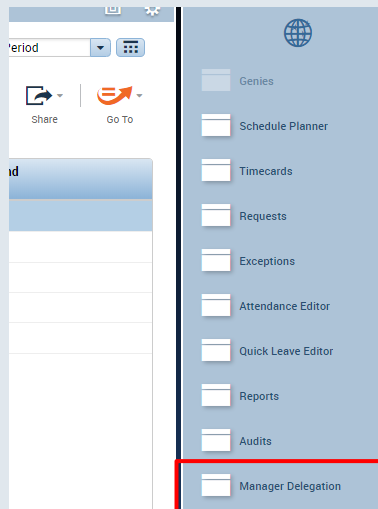
Steps

From the home page, click on the '+' and select Manage my Department

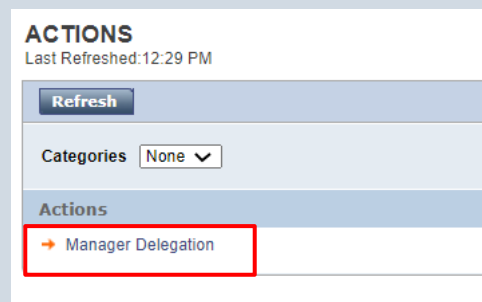
Screenshots



Navigate to the Related Items tab on the right side of the screen and go to **Manager Delegation**.



The only action available under this tab is also **Manager Delegation**. Once it is clicked, a new window will pop up.



Steps

This will bring you to a page that shows the everything you will need to fill out to complete the Manager Delegation window.

Select the employee you want to delegate to, the duration, and the role you want to delegate. Once you assign that delegation the employee will be able to perform the role you delegated until the end date

Press **Save & Close** to confirm delegation.

Screenshots

The screenshot displays a web interface for managing delegations. It is divided into two main sections: 'Existing Delegations' and 'New Delegation'.

- Existing Delegations:** A table with one row containing the text 'None'.
- New Delegation:** A form with the following fields:
 - * Delegate:** A dropdown menu with 'Aarons, Ingrid C' selected.
 - * Start Date:** An empty date input field with a calendar icon.
 - * End Date:** An empty date input field with a calendar icon.
 - * Role:** A dropdown menu with 'CT Payroll Manager' selected.

At the bottom right of the form, there are two buttons: 'Save & Close' (highlighted with a red box) and 'Cancel'.

Accepting a Manager Delegation

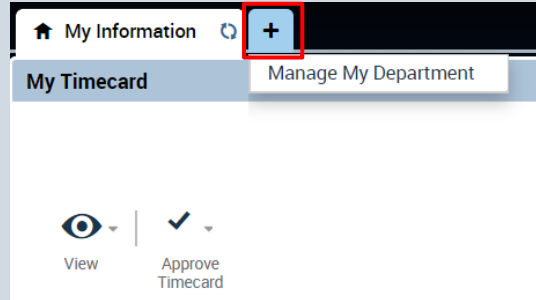
Purpose:

This job aid will help you accept a request for manager delegation .

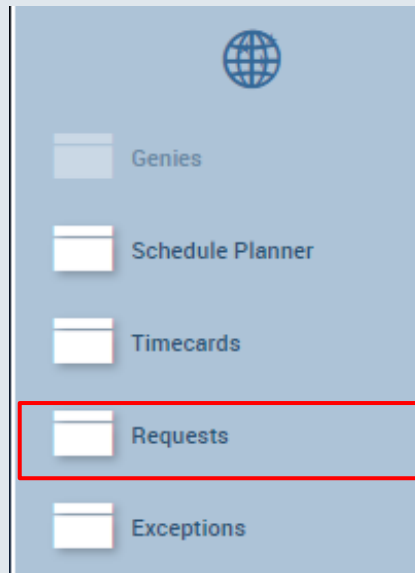
Steps

From the home page, click on the '+' and select Manage my Department

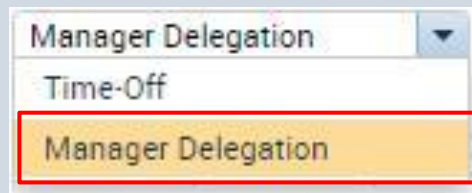
Screenshots



Navigate to the Related Items tab on the right side of the screen and go to **Requests**



Select the Time Off drop down and switch the type of request to **Manager Delegation**






Steps

Screenshots

Right click on the delegation request and select Details to open up a more detailed view on that specific request.

Modified By (Username)	Subject
Abdul-Lateef, Shaneka N on behalf of Aarons, Ingrid	Accept Delegation Form

-  Details
-  Edit
-  Add Request

Decide whether you want to Decline or Approve the delegation, after clicking approve select **Apply**.

New Delegation

Delegator: Persona, Manager
Start Date: 7/31/2020
End Date: 8/03/2020
Role: CT Supervisor

Action

Select Action: Accept Delegation
 Decline Delegation

Comment:

Once you sign back in, click on the arrow next to your name to switch your role to the delegated form.

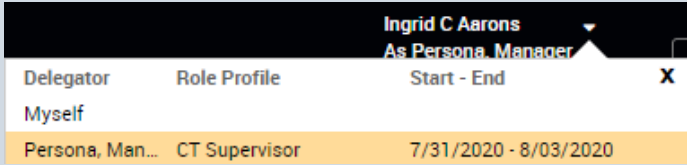
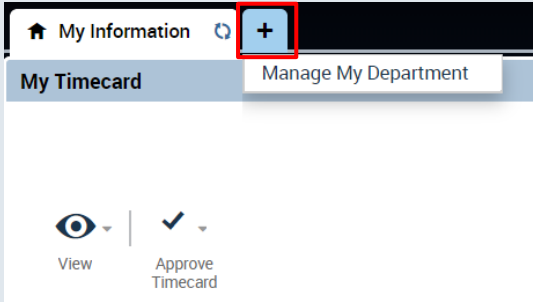
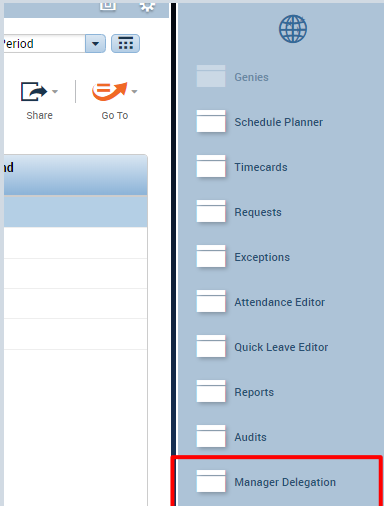
From here, you can make any changes to the employees time you need to review.

Shaneka N Abdul-Lateef			
As Aarons, Ingrid C			
Delegator	Role Profile	Start - End	X
Myself			
Aarons, Ingrid C	CT Supervisor	7/29/2020 - 7/30/2020	

Delegate a Delegation

Purpose:

This job aid will help you delegate a delegation you accepted.

Steps	Screenshots
<p>Switch to the role that you have been delegating by clicking the arrow on the top right and switching the person you are signed in as from the drop down.</p>	 <p>A screenshot of a user profile dropdown menu. At the top, it says 'Ingrid C Aarons' and 'As Persona Manager'. Below this are three tabs: 'Delegator', 'Role Profile', and 'Start - End'. Under 'Delegator', there are two options: 'Myself' and 'Persona, Man...'. The 'Persona, Man...' option is highlighted in yellow. To the right of 'Persona, Man...' is the text 'CT Supervisor' and '7/31/2020 - 8/03/2020'. There is a small 'X' icon in the top right corner of the dropdown.</p>
<p>From the home page, click on the '+' and select Manage my Department</p>	 <p>A screenshot of a home page navigation menu. At the top, there is a header with 'My Information' and a refresh icon. To the right of the header is a '+' icon in a red box. Below the header is a dropdown menu with two options: 'My Timecard' and 'Manage My Department'. Below the dropdown are two icons: an eye icon labeled 'View' and a checkmark icon labeled 'Approve Timecard'.</p>
<p>Navigate to the Related Items tab on the right side of the screen and go to Manager Delegation</p>	 <p>A screenshot of a sidebar menu titled 'Related Items'. The sidebar contains several menu items: 'Genies', 'Schedule Planner', 'Timecards', 'Requests', 'Exceptions', 'Attendance Editor', 'Quick Leave Editor', 'Reports', 'Audits', and 'Manager Delegation'. The 'Manager Delegation' item is highlighted with a red box.</p>

Steps

The only action available under this tab is also **Manager Delegation**. Once it is clicked, a new window will pop up.

Screenshots

ACTIONS
Last Refreshed: 12:29 PM

Refresh

Categories: None ▾

Actions

- Manager Delegation

Here you will be given the option to create a new delegation or remove the existing delegation since you can only have one at a time. Select **Create New Delegation**.

Action

Select Action: Create New Delegation
 Remove Existing Delegation

Under New Delegation, you'll see the existing delegation and you have the option to transfer it elsewhere. Select the delegate, the dates and the roll. Select **Apply**.

Existing Delegations

Aarons, Ingrid C: 7/31/2020 - 8/03/2020, CT Supervisor

New Delegation

* Delegate: Aarons, Ingrid C ▾

* Start Date:

* End Date:

* Role: CT Payroll Manager ▾

Your delegate will then receive the request for delegation saying you are delegating on behalf of someone else.

New Delegation

Delegate: Abdul-Lateef, Shaneka N on behalf of Aarons, Ingrid C

Start Date: 7/29/2020

End Date: 7/30/2020

Role: CT Supervisor

Action

Select Action: Accept Delegation
 Decline Delegation

Comment: