Creating a Delegation Request

Delegator:

Use the Navbar to go to Main Menu > Self Service > Manage Delegations.

Note: The proxy must accept the delegation in order to have access to the delegator’s direct reports.
Click **Create Delegation Request**.

**Manage Delegation**

Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.

Select **Create Delegation Request** to choose transactions to delegate and proxies to act on your behalf.

Enter a **From Date** that is today or later. Enter a **To Date** that is the same day or later than your From Date. Click **Next**.

Select the checkbox next to the following transactions:

- **Manage Approve Payable Time** – This allows the proxy to approve Payable time for the supervisor/delegator’s direct reports.
- **Manager Absence Request** – This allows the proxy to enter absences on behalf of the supervisor/delegators direct reports into absence management.
Once you have selected the appropriate checkboxes, click **Next**.

### Delegate Transactions

<table>
<thead>
<tr>
<th>Transaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑ Manage Approve Payable Time</td>
</tr>
<tr>
<td>☐ Manager Absence Balance</td>
</tr>
<tr>
<td>☐ Manager Absence History</td>
</tr>
<tr>
<td>☑ Manager Absence Request</td>
</tr>
</tbody>
</table>

Choose the person you would like to request to be your proxy. Then click **Next**.

### Choose Delegate

<table>
<thead>
<tr>
<th>Name</th>
<th>Empl ID</th>
<th>Organizational Relationship</th>
<th>Job Title</th>
<th>Department</th>
<th>Supervisor Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Employee</td>
<td>PAYROLL BEN SPEC</td>
<td>DOA-Pay &amp; Benefits Svcs</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Employee</td>
<td>HUMAN RESOURCES SPEC-SEN</td>
<td>DOA HR - Chief</td>
<td></td>
</tr>
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<td></td>
<td></td>
<td>Employee</td>
<td>EQUAL OPPOR PROG SPEC-SEN</td>
<td>DOA HR - Chief</td>
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</tr>
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<td></td>
<td></td>
<td>Employee</td>
<td>HUMAN RESOURCES SPEC-ADV</td>
<td>DOA HR - Chief</td>
<td></td>
</tr>
<tr>
<td>☑</td>
<td></td>
<td>Employee</td>
<td>HUMAN RESOURCES PROG OFFICER</td>
<td>DOA HR - Chief</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Employee</td>
<td>PAYROLL BEN SPEC-ADV</td>
<td>DOA-Pay &amp; Benefits Svcs</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Employee</td>
<td>HUMAN RESOURCES SPEC-SEN</td>
<td>DOA HR - Chief</td>
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</tr>
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<td></td>
<td></td>
<td>Employee</td>
<td>HUMAN RESOURCES ASSISTANT</td>
<td>DOA HR - Chief</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Employee</td>
<td>HUMAN RESOURCES ASSISTANT-ADV</td>
<td>DOA HR - Chief</td>
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</tr>
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<td></td>
<td></td>
<td>Employee</td>
<td>HUMAN RESOURCES SPEC</td>
<td>DOA HR - Chief</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>Employee</td>
<td>PAYROLL BEN SPEC-ADV</td>
<td>DOA-Pay &amp; Benefits Svcs</td>
<td></td>
</tr>
</tbody>
</table>
Once you have reviewed the request, click **Submit**.

**Delegation Detail**

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Proxy

From Date 04/26/2019
To Date 05/04/2019

**Transactions**

- Manage Approve Payable Time
- Manager Absence Request

Click **OK**.

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You have successfully submitted a delegation request. Refer to the My Proxies page to view the status of the request.

**Accepting a Delegation Request**

Proxy:

Click on link in email notification generated by delegator’s request.

Subject: A delegation request from Erin Henkes has been submitted for review and acceptance

Erin Henkes or an administrator on behalf of Erin Henkes has submitted a delegation request to you. Here are the details:

Transaction(s): Manage Approve Payable Time, Manage Reported Time, Manager Absence Request

From: 2015-10-29
To: 2015-11-06
System to notify Erin Henkes of each request: N

You can review the request, then accept or reject the request, using the link below.

Click **OK**.

**Accept Delegation Request**

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You have successfully accepted a delegation request. Refer to the My Delegated Authorities page to view accepted delegation requests.

**OK**

From the **PeopleSoft Manager Self-Service Homepage**, select Team Time

Select **Approve Payable Time**

- Team Timesheet
- Team Absence Request
- Team Absence Request History
- Team Absence Balances
- Team Leave & Compensatory Time
- Manager Search Options
Click on specific delegate or yourself and click **Continue** to view and approve payable time for the chosen person.

Revoke a Delegation

Use the Navbar to go to Main Menu > Self Service > Manage Delegations.
To review or discard your delegation, click **Review My Proxies**.

**Manage Delegation**

Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.

Learn More about Delegation

Select **Create Delegation Request** to choose transactions to delegate and proxies to act on your behalf. Create Delegation Request

Select **Review My Proxies** to review the list of transactions that you have delegated and the proxy for each transaction. Review My Proxies

Choose the transaction(s) you wish to revoke, or click the **Select All** link to revoke all transactions. Click **Revoke**.

Click **Yes – Continue**.

**Revoke Delegation Request**

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Are you sure you want to revoke the delegation requests that you have selected?

Yes - Continue  No - Cancel

**Additional Resources**

If you have further questions about any of the topics presented in this Job Aid, additional resources are available at https://dpm.wi.gov/Pages/Managers_and_Supervisors/HcmJobAids.aspx