

Approval Delegation – HCM and FINANCE

This guide walks employees through how to delegate the Approval of TimeCards, Absence Requests and Compensation for HCM. **It will also show how to disable any Vacation Rule delegations for Invoice and Expense Approval and recreate them in the Approval Delegation Area.**


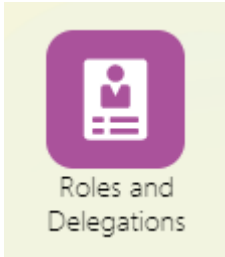
Additional Resources:

- [GMHEC Knowledgebase](#)

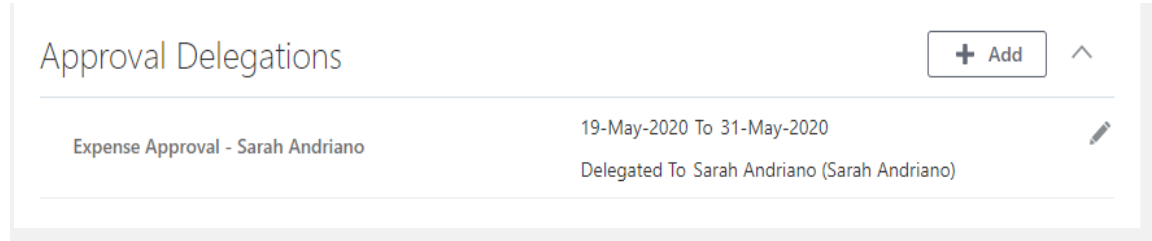
Walkthroughs:

- 1.0 Navigation Path
- 2.0 Check for Existing Finance delegations and Delete
- 3.0 Create new Delegation

Audience: All

| Process Step & Description | Action |
|----------------------------|--|
| 1.0 Navigation Path | <p>Getting Started</p> <ul style="list-style-type: none"> ➤ Navigation Path Me > Roles and Delegations > Scroll to the very bottom <p>From the Home screen:</p> <ul style="list-style-type: none"> • Click on “Me” to see all Employee Self-Service applications <div style="text-align: center;">  </div> <ul style="list-style-type: none"> • Click on the “Roles and Delegations” tile <div style="text-align: center;">  </div> |

- Scroll to the bottom to the 'Approval Delegation' area



2.0 Checking for existing Delegations set up for Finance tasks

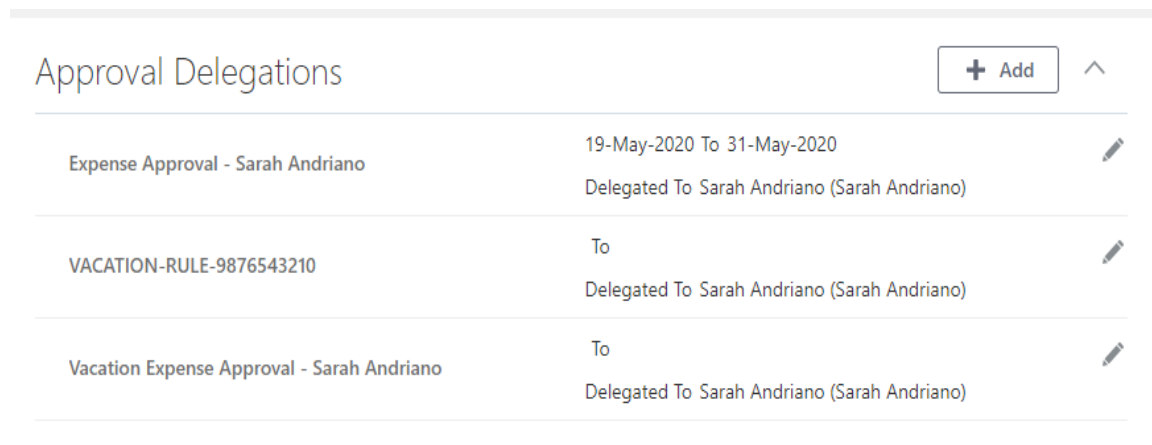
Review existing Delegations set up for Finance Tasks and Delete

Any delegations set up via the "Vacation Rules" process will also delegate any HCM approval an employee may need to do, and this is not the desired outcome. The Vacation Rules need to be deleted, and Approval Delegations in this screen can be created for Invoice Approval and Expense Approval separately, as well as any HCM delegations needed. They can individually be assigned to different delegates, or the same delegate.

- Open the Down Arrow next to Approval Delegations



- If you are in this screen for the first time, and see entries, it means you have either expired or active Vacation Rules set up. (they show up here, but you cannot view or change the details of the Rules here). Make a note of the active delegates and delete these entries.



- Click the Pencil Icon on the right and then click the Delete button

| | |
|---|--|
| | <div style="text-align: right; margin-bottom: 10px;"> <input type="button" value="Delete"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/> </div> <p>*Rule Name</p> <input type="text" value="Vacation Expense Approval - Sarah Andriano"/> <p>*Delegate To</p> <input type="text" value="30000006997492"/> <ul style="list-style-type: none"> Recreate any needed delegations by following the steps below in section 3.0, choosing the Categories “Invoice Approval” and “Expense Approval” as needed. You will need 2 separate delegations even if the delegate is the same person. <p>You may also review and delete your Vacation rules in the screen where you created them if you choose. This Reference Guide will remind you how to do this.</p> |
| <p>3.0 Create HCM or Finance Delegations</p> | <p>Create a New Delegation</p> <p>From the “Approval Delegation” section:</p> <ul style="list-style-type: none"> Click the down arrow to open up the Approval Delegation area Click the + ADD button <div style="text-align: center; margin: 10px 0;"> <input type="button" value="+ Add"/> </div> <ul style="list-style-type: none"> Fill in required and optional fields as needed: <ul style="list-style-type: none"> Rule Name – free type this. Helpful to add the Type of delegation (Absence, Invoice Approval, etc, and the name of the delegate here) Start Date - required End Date – optional Category – the function you are delegating (select from drop-down list – these are the valid ones you can choose, for both HCM and Finance tasks) |

| HCM | FIN |
|-------------------------|-----|
| Expense Report Approval | ← |
| Time and Labor Approval | ← |
| Invoice Approval | ← |
| Absence Approval | ← |
| Purchasing Approval | ← |
| Journal Approval | ← |

- Delegate to - start typing either the first or last name and a list of options will pop up (confirm you are selecting the correct person by checking their email and person number)
- Allow user to approve own transactions (checkbox) - leave unchecked (unless instructed otherwise)

*** Rule Name**

Expense Approval - Sarah Andriano

*** Start Date**

19-May-2020



End Date

31-May-2020



*** Category**

Expense Report Approval



*** Delegate To**

Sarah Andriano (Sarah Andriano)



Allow this user to approve their own transaction

- Click the SAVE button and your delegation is complete
- Repeat as needed to set-up other delegations needed

