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.

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

Audience: All

### Getting Started

- **Navigation Path**
  Me > Roles and Delegations > Scroll to the very bottom

From the Home screen:
- Click on “Me” to see all Employee Self-Service applications

![Me]

- Click on the “Roles and Delegations” tile

![Roles and Delegations]
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
3.0 Create HCM or Finance Delegations

Create a New Delegation

From the “Approval Delegation” section:

- Click the down arrow to open up the Approval Delegation area
- Click the + ADD button

- Fill in required and optional fields as needed:
  - 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)

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.
- 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)

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