

Use this task to create a delegation request.

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Manage Delegation	
Ignacio Perro	
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.	
Cearn More about Delegation	
Select Create Delegation Request to choose transactions to delegate and proxies to act on your behalf.	
Create Delegation Request	

Step	Action
1.	Click the Create Delegation Request link.
	Create Delegation Request



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Create Delegation Request								2 1
Enter Dates								
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Enter the dates for your delegation request. Enter a <i>From Date</i> that is today or later. Enter a <i>To L</i> is the same as or later than your <i>From Date</i> . For open-ended delegation requests, leave the <i>To L</i> blank.	ate that ate							
Delegation Dates								
From Date 05/10/2017								
To Date								
Next Cancel								

Step	Action
2.	The system displays the Enter Dates page.
	Click in the From Date field. 05/10/2017
3.	Enter the desired information into the From Date field. The date defaults to the system date (today's date), but you can update it as necessary).
	For this example, enter 5/24/2017.
4.	Delegations can be made for a specific timeframe or can be open ended. If the To Date field is left blank, the delegation remains in effect until revoked.
	Click in the To Date field.
5.	Enter the desired information into the To Date field. For this example, enter 5/31/2017 .
6.	Click the Next button.



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Create Delegation Request						
Select Transactions						
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Select the transactions that you want to delegate to a proxy. You can select one or many transact	tions.					
Delegate Transactions						
Transaction						
Additional Pay	~					
Approve Life Event Documents						
Compensation Approvals						
Confirm Compensation Proposals						
Employee Absence Balance						
Employee Absence History						
Employee Absence Request						
Manage Approve Payable Time						
Manager Absence Approve						
Manager Accrual Request						
One Time Batch Request						
One Time Payment						
Payroll Request						
Review Compensation Proposals						

Step	Action
7.	The system displays the Select Transactions page. You can delegate one or multiple transactions to another approver in a single delegation request, and you can also set up multiple delegation requests. For example, you can delegate all employee compensation related transactions to one proxy and all other transactions to another proxy.
	If necessary, scroll down to display additional list items. Click the scroll bar.



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Step	Action
8.	Select the check box next to each transaction you want to delegate to another approver, or click the Select All link at the bottom of the list to select all transactions. In this example, you will delegate all transactions to another approver. Click the Select All link. Select All
9.	Click the Next button.



Home Worklist MultiChannel Console Add to Favorites Sign out Create Delegation Request New Window Help Personalize Page] New Window Help Personalize Page] Image: Create Delegation Request New Window Help Personalize Page] Image: Create Delegation Request Image: Create Delegation Request Image: Create Delegate Proxy by Name Image: Create Delegate Proxy by Previous Name Image: Create Delegate Proxy by Previous Name Image: Create Delegate Proxy by Previous Name Image: Create Delegate Proxy by Delegate Proxy Proximate Proximational Previous Next Image: Create Delegate Proxy Proximate Proxima	aroneo - mainmond	· · · · · · · · · · · · · · · · · · ·	ervice V Vianag	e Delegation			
New Window Help Personalize Page Image: Create Delegation Request Select Proxy by Name Ignacio Perro PRG REPR SUPV Search for a proxy using their name. You can also select the Search By Hierarchy hyperlink to search for your proxy. Search by Hierarchy Last Name Q First Name Q First Name Provide Clear Choose Delegate Name Empt ID Previous Next Cancel	DRACLE			Ha	me Worklist Mu	ItiChannel Console Add to Favorites	Sign out
Create Delegation Request Select Proxy by Name Ignacio Perro PRG REPR SUPV Search for a proxy using their name. You can also select the Search By Hierarchy hyperlink to search for your proxy. Search by Hierarchy Last Name Q First Name Q Search Clear Choose Delegate Name Empt ID Organizational Relationship Job Title Department Supervisor Name						New Window Liloin Demonstra	
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Last Name Q First Name Q Search Clear Choose Delegate Organizational Relationship Job Title Department Supervisor Name Previous Next Cancel Cancel Concel Concel <td>Search by Hierarchy</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	Search by Hierarchy						
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Choose Delegate Companizational Relationship Job Title Department Supervisor Name Previous Next Cancel	Search	Clear					
Name Empl ID Organizational Relationship Job Title Department Supervisor Name Previous Next Cancel	Choose Delegate						
Previous Next Cancel	Name	Empl ID	Organizational Relationship	Job Title	Department	Supervisor Name	
Previous Next Cancel	0						
	Previous	Next	Cancel				

Step	Action
10.	The system displays the Select Proxy by Name page.
	Click in the Last Name field.
11.	Enter the desired information into the Last Name field. For this example, enter Allen .
12.	Click in the First Name field.
13.	Enter the desired information into the First Name field. For this example, enter DAN .
14.	Click the Search button.



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Create Delegation Re	quest					Í
Select Proxy by Nam	е					
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Search for a proxy using their na your proxy.	me. You can al	so select the Search E	By Hierarchy hyperlink to search for			
Search by Hierarchy						
Last Name ALLE	N		٩			
First Name DAN			٩			
Search C	ear					
Choose Delegate						
Name	Empl ID	Organizational Relationship	Job Title	Department	Supervisor Name	
O Dan Allen	10000189	Employee	DIR	Univ of CA - Ofc of President		
Previous	Next	Cancel				

Step	Action
15.	The Choose Delegate section displays the user(s) that match the search criteria you entered. Click to select the individual to whom you want to delegate approval.
	For this example, click the Dan Allen option.
	0
16.	Click the Next button.
	Next
17.	The system displays the Delegation Detail page. If necessary, scroll down to display additional fields and page options.
	Click the scroll bar.



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Delegation Detail				
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Proxy Dan Allen				
From Date 05/24/2017				
To Date 05/31/2017				
Transactions				
Additional Pay	~			
Approve Life Event Documents				
Compensation Approvals				
Confirm Compensation Proposals				
Employee Absence Balance				
Employee Absence History				
Employee Absence Request				
Manage Approve Payable Time				
Manager Absence Approve				
Manager Accrual Request				
One Time Batch Request				
One Time Payment				
Payroll Request				
Review Compensation Proposals				
Smart HR Transactions	\sim			

Step	Action
18.	Click the Submit button.
	Submit

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



Step	Action
19.	If there are no errors, the Create Delegation Request page displays a confirmation that you successfully submitted the request.
	Click the OK button.

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Manage Delegation							
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Some of your self-service transactions can be delegated so that others may act on your behalf to i and/or approve transactions for you and/or your employees. In addition, others may have delegate responsibility for their transactions to you.	nitiate :d						
Learn More about Delegation							
Select Create Delegation Request to choose transactions to delegate and proxies to act on your b	ehalf.						
Create Delegation Request							
Select Review My Proxies to review the list of transactions that you have delegated and the proxy transaction.	for each						
Review My Proxies							

Step	Action
20.	Notice that the system displays the Review My Proxies link on this page. This indicates you currently have one or more delegated proxies assigned for UCPath transaction approvals.
	After you submit a delegation request, the system sends the proxy approver an e- mail notification. To perform the task or tasks, the user identified as the proxy must accept the delegation request.
	After your proxy accepts the request, the delegation remains until the end date is reached or until you revoke the delegation. If you must revoke the delegation request prior to the end date you entered on the request, refer to <i>Revoke Delegation Request</i> for additional information.
21.	You have created a delegation request. End of Procedure.