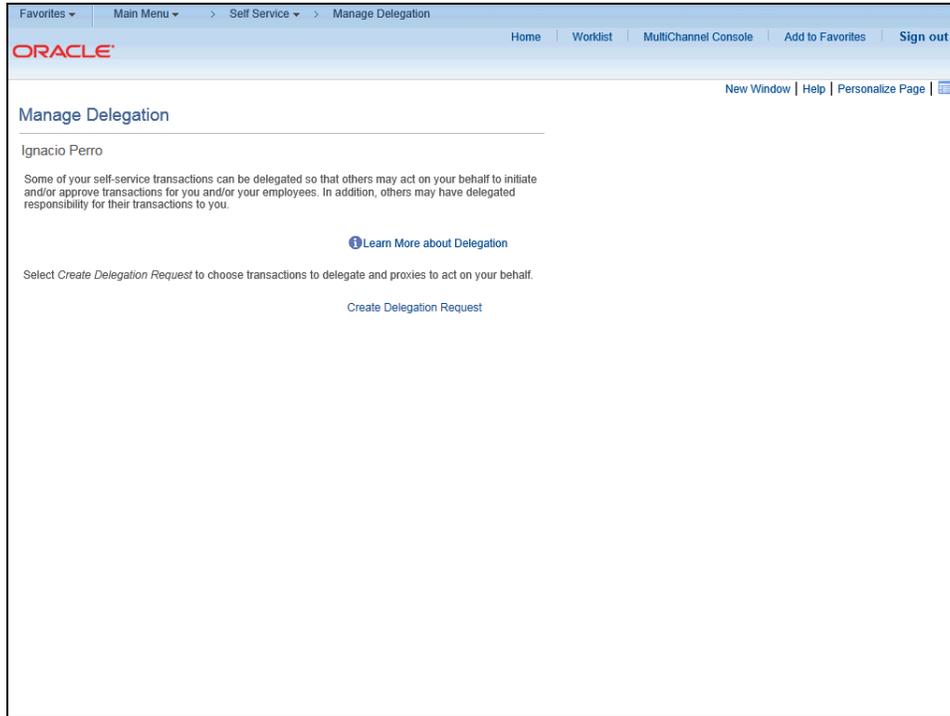


Use this task to create a delegation request.

Navigation: PeopleSoft Menu > Self Service > **Manage Delegation**



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

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Create Delegation Request

Enter Dates

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PRG REPR SUPV

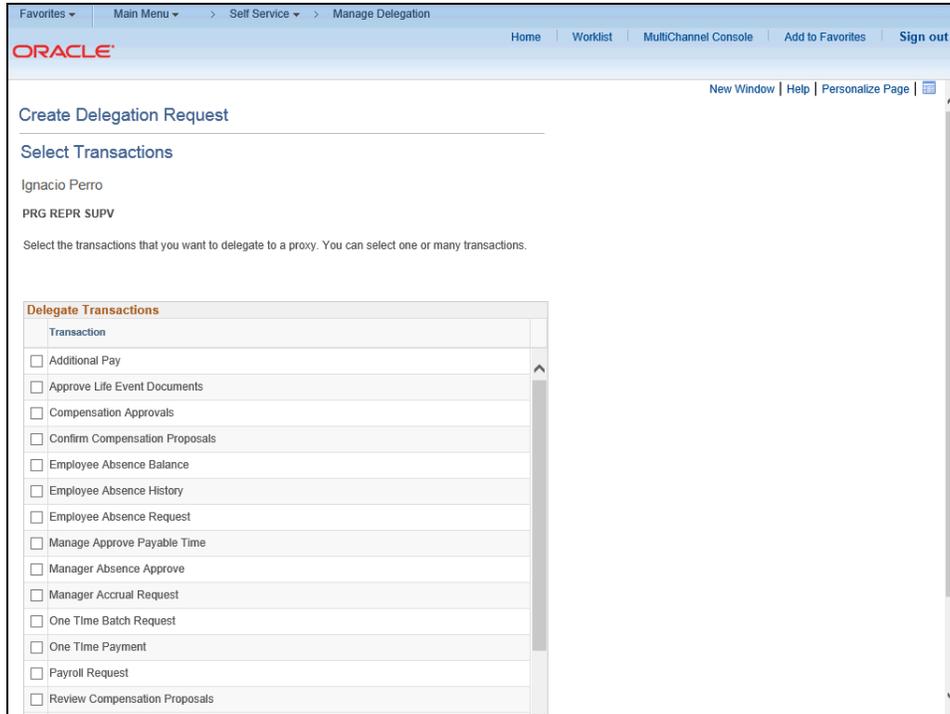
Enter the dates for your delegation request. Enter a *From Date* that is today or later. Enter a *To Date* that is the same as or later than your *From Date*. For open-ended delegation requests, leave the *To Date* blank.

Delegation Dates

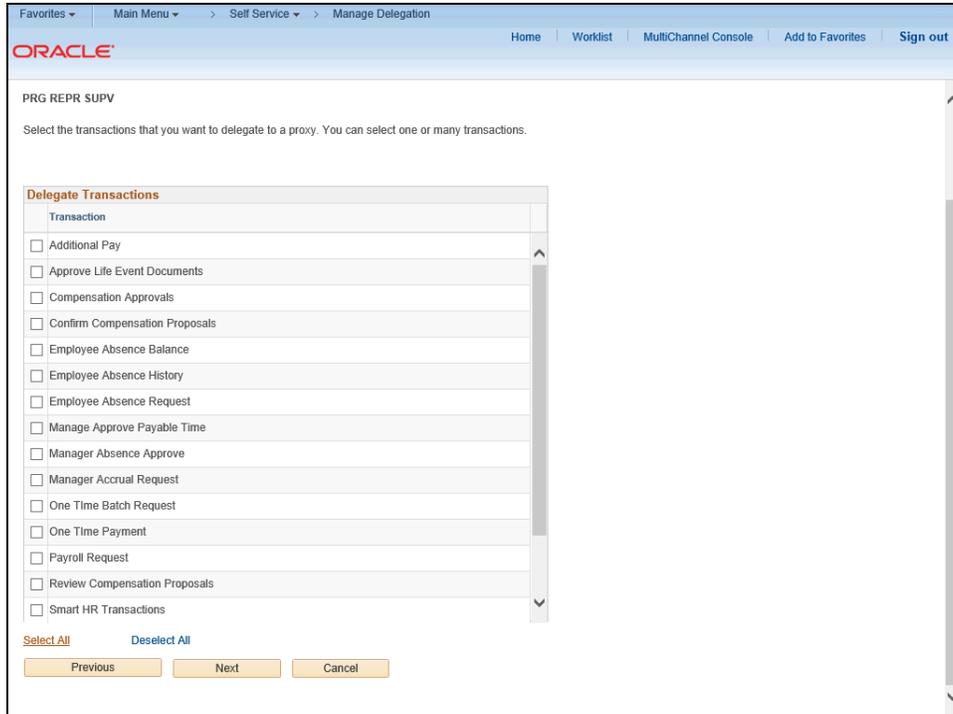
From Date

To Date

Step	Action
2.	<p>The system displays the Enter Dates page.</p> <p>Click in the From Date field.</p> <p><input type="text" value="05/10/2017"/></p>
3.	<p>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).</p> <p>For this example, enter 5/24/2017.</p>
4.	<p>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.</p> <p>Click in the To Date field.</p> <p><input type="text"/></p>
5.	<p>Enter the desired information into the To Date field. For this example, enter 5/31/2017.</p>
6.	<p>Click the Next button.</p> <p><input type="button" value="Next"/></p>



Step	Action
7.	<p>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.</p> <p>If necessary, scroll down to display additional list items.</p> <p>Click the scroll bar.</p>



Step	Action
8.	<p>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.</p> <p>In this example, you will delegate all transactions to another approver. Click the Select All link.</p> <p>Select All</p>
9.	<p>Click the Next button.</p> <p>Next</p>

Oracle UCPath interface for 'Create Delegation Request'. The page shows a search for a proxy by name. The current user is Ignacio Perro, PRG REPR SUPV. There are search fields for Last Name and First Name, and a 'Search' button. Below is a table titled 'Choose Delegate' with columns: Name, Empl ID, Organizational Relationship, Job Title, Department, Supervisor Name. The table is currently empty.

Step	Action
10.	The system displays the Select Proxy by Name page. Search for and select the individual to which you are delegating authority. Click in the Last Name field. <input type="text"/>
11.	Enter the desired information into the Last Name field. For this example, enter Allen .
12.	Click in the First Name field. <input type="text"/>
13.	Enter the desired information into the First Name field. For this example, enter DAN .
14.	Click the Search button. <input type="button" value="Search"/>

Oracle
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Manage Delegation

Create Delegation Request

Select Proxy by Name

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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 ALLEN

First Name DAN

Search Clear

Choose Delegate

Name	Empl ID	Organizational Relationship	Job Title	Department	Supervisor Name
<input type="radio"/> Dan Allen	10000189	Employee	DIR	Univ of CA - Ofc of President	

Previous Next Cancel

Step	Action
15.	<p>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.</p> <p>For this example, click the Dan Allen option.</p> 
16.	<p>Click the Next button.</p> 
17.	<p>The system displays the Delegation Detail page. If necessary, scroll down to display additional fields and page options.</p> <p>Click the scroll bar.</p>

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Delegation Detail

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PRG REPR SUPV

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

Submit Previous Cancel

Step	Action
18.	Click the Submit button.

Submit

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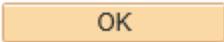
New Window | Help | Personalize Page

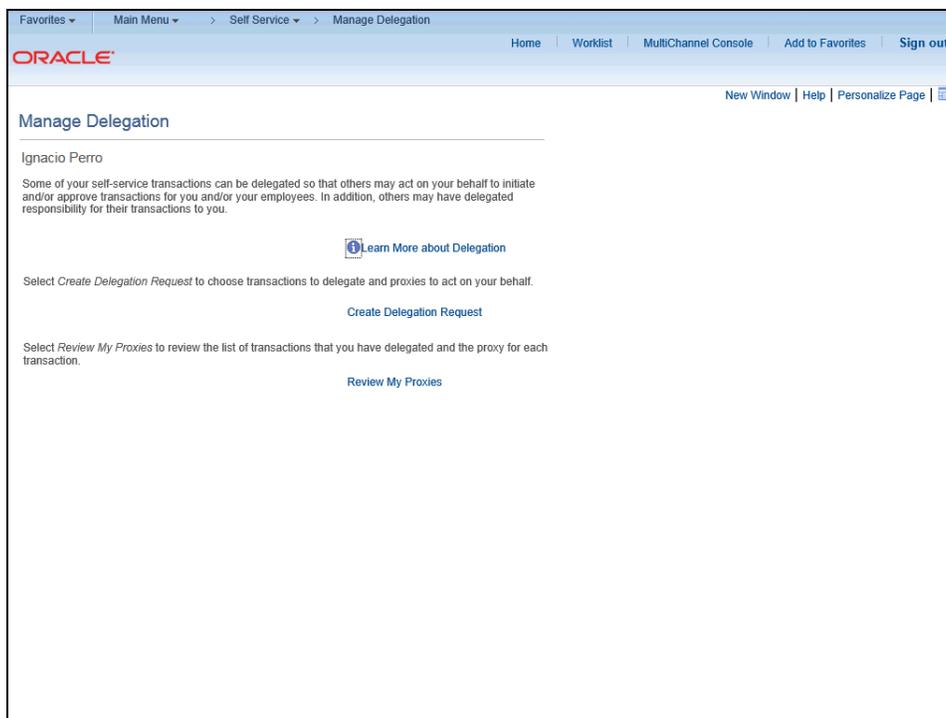
Create Delegation Request

Ignacio Perro
PRG REPR SUPV

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

OK

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



Step	Action
20.	<p>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.</p> <p>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.</p> <p>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.</p>
21.	<p>You have created a delegation request.</p> <p>End of Procedure.</p>

