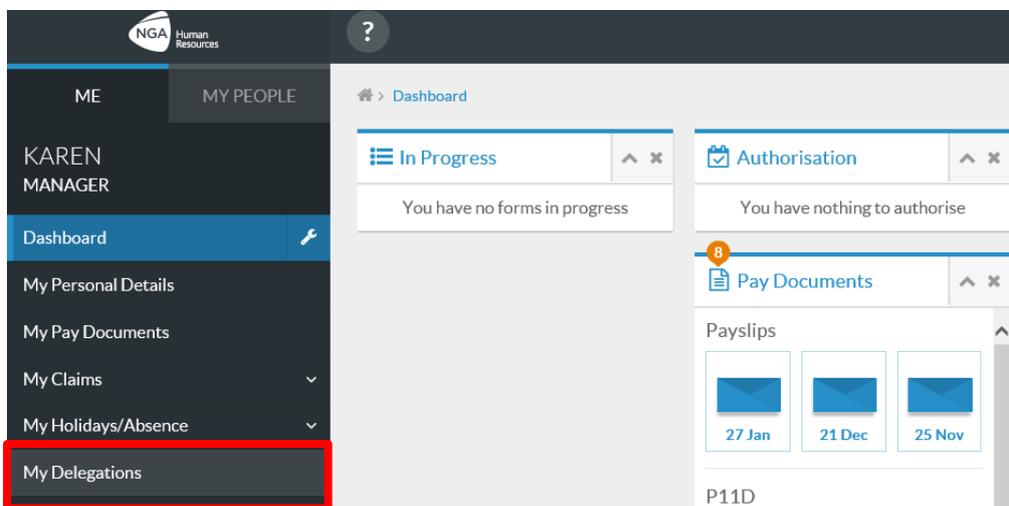


Delegation of Leave Management (Suitable in job share situations)

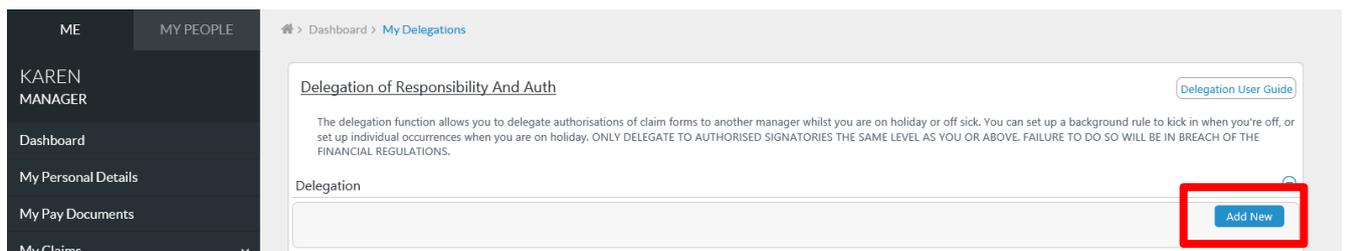
There may be instances where it is appropriate for two managers to have a role in processing sickness or annual leave for an employee. The most common example of this is in job share situations. The post to post structure within the HR and Payroll system means an employee can only report to one manager. To enable the other manager to input sickness or authorise annual leave a delegation rule needs to be created. This needs to be created by the manager whom the employees report to. The delegation rule means that both managers will be able to process sickness on behalf of the employees or authorise/reject leave requests.

Creating the Delegation Rule

To create the delegation rule log into MyView and click on **My Delegations** which can be found at the left hand side of the screen.



The Delegation screen will appear, click on the **Add New** button



To delegate the authorisation of annual leave two delegation rule types need to be created an **Authorisation** one and a **Responsibilities** one.

New Rule

Rule Type * Authorisation Responsibilities

Description *

Delegate To *

Delegate For *

Module/Process Group/View *

Delegation Period

From Date

To Date

Absence

Suppress Email Notifications

Rule Type - Select Authorisation

Description - enter the reason for the delegation i.e. Job share delegation

Delegate to - click the **Search** button to find the appropriate manager to delegate to. Enter the name or employee number then click search. A list should appear with this person included. Select the appropriate person then click continue.

AdvancedSearch

Surname:

First Name:

Known As:

Previous Surname:

Employee Number:

Direct Reports Only:

Select: Name: JONES, ELIZABETH Employee Number: 103921 Location: Not Available

Please make your selection from the search results to [Continue], or amend the search criteria and perform a new [Search]

Delegate for - Click the **Select** to find the appropriate team members you would like to delegate create the delegation rule for.

Select Option People Individually Direct Reports Whole Team

Employee Name	Employee Number	Post	Employee Information
<input type="checkbox"/> SUSAN SMITH	101494	TEAM LEADER	
<input type="checkbox"/> JUDY WRIGHT	114904	ADMINISTRATIVE ASSISTANT	
<input type="checkbox"/> EMMA MCGREGOR	119130	ASSISTANT	
<input type="checkbox"/> JOHN SMITH	118035	RESOURCE ASSISTANT	
<input type="checkbox"/> SOPHIE WATSON	109362	RESOURCES ASSISTANT	

Select the appropriate option of whether you would like to select individuals, people who directly report to you, or your whole team. If you have chosen to select individuals select the relevant employees from the list, then click continue.

Module / Process Group / View - Click Select to then choose from list of options

To delegate annual leave authorisation and sickness processing select **Time Management** and click on **Continue**

Select the Modules and Process Groups that you wish to delegate.

[Select All](#) [Deselect All](#)

- Expense Claims
- Irregular Claims
- Planner
- Time Management

[Back](#) [Continue](#)

In the **From** and **To Date** fields enter the dates you would like to start and end the delegation if you only want this to be in place for a set period. If you are creating a delegation for a job share situation leave the to date field blank and the rule will be open ended.

Rule Type * Authorisation Responsibilities

Description * Jobshare Rule

Delegate To * ELIZABETH JONES [Search](#)

Delegate For * Whole Team of TEAM LEADER [Select](#)

Module/Process Group/View * Time Management [Select](#)

Delegation Period

From Date 01/03/2017 [x](#) [📅](#)

To Date [📅](#)

Absence

Suppress Email Notifications

[Submit](#)

Absence - Do not tick this functionality this is currently being tested.

Suppress Authorisations and Emails - Tick this to stop you receiving emails whilst you are off. The person you have delegated to **will not** receive any emails so will need to ensure they check system. In a job share situation you may wish to leave this field blank.

Click on Submit, the first part of the delegation rule has now been created.

Delegation of Responsibility And Auth [Delegation User Guide](#)

The delegation function allows you to delegate authorisations of claim forms to another manager whilst you are on holiday or off sick. You can set up a background rule to kick in when you're off, or set up individual occurrences when you are on holiday. ONLY DELEGATE TO AUTHORISED SIGNATORIES THE SAME LEVEL AS YOU OR ABOVE. FAILURE TO DO SO WILL BE IN BREACH OF THE FINANCIAL REGULATIONS.

Delegation [Add New](#)

Type	Delegated to	From	To	Absence	Description
A	ELIZABETH JONES	01/03/2017		N	Jobshare Rule

The **Responsibilities** rule type now needs to be created. The same steps should be followed as explained previously. The only difference is the rule type **Responsibilities** should be selected and there are different options within the **Module / Process Group / View section**.

Module / Process Group / View section – the screen below will appear.

Select the Modules, Process Groups and Views that you wish to delegate.

View Only

Expense Claims View Only

 Irregular Claims View Only

 Planner View Only

 Time Management View Only

Select the box next to **Time Management** and in the drop down change the option from View Only to **Save & Submit**, click on **Continue**

Delegation of Responsibility And Auth [Delegation User Guide](#)

Select the Modules, Process Groups and Views that you wish to delegate.

View Only

Expense Claims View Only

 Irregular Claims View Only

 Planner View Only

 Time Management

View Only

Save

Submit

Save & Submit

The rule type can be submitted.

Delegation of Responsibility And Auth [Delegation User Guide](#)

New Rule

Authorisation
 Responsibilities

Rule Type *

Description * Jobshare Cover

Delegate To * ELIZABETH JONES

Delegate For * Whole Team of TEAM LEADER

Module/Process Group/View * Time Management - Save & Submit

Delegation Period

From Date 01/03/2017

To Date

Absence

Suppress Email Notifications

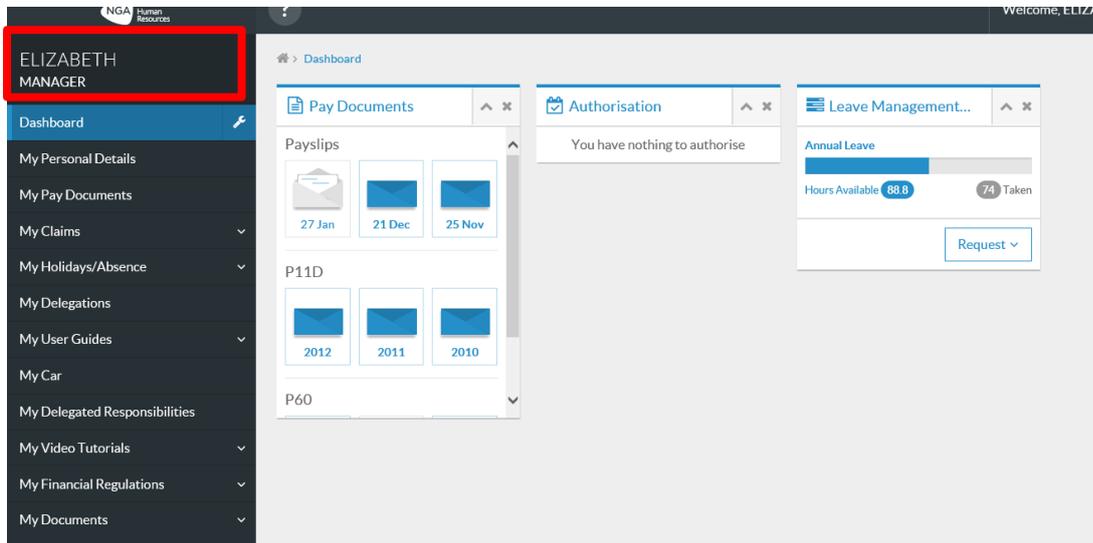
The delegation rule is now in place and the other manager will be able to carry out sickness input and authorise annual leave.

Delegation

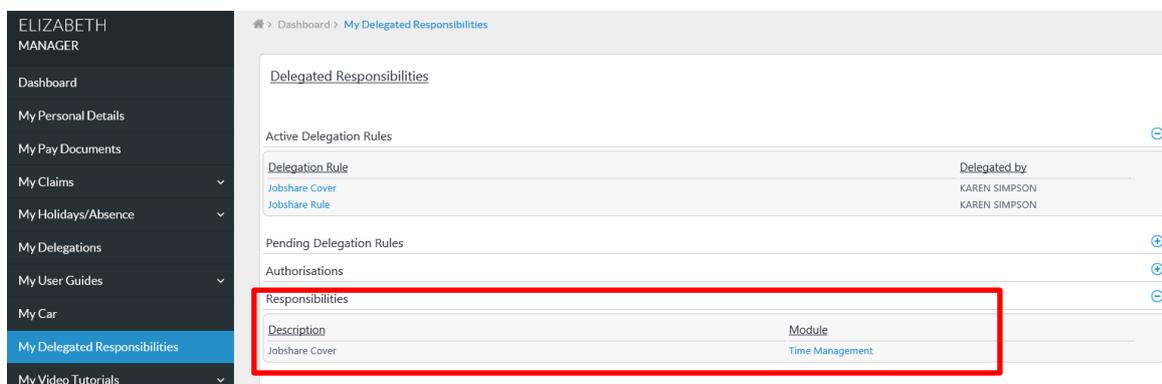
Type	Delegated to	From	To	Absence	Description
A	ELIZABETH JONES	01/03/2017		N	Jobshare Rule
R	ELIZABETH JONES	01/03/2017		N	Jobshare Cover

Using the Delegated Options

As the other manager does not have any employees reporting directly to them they will have to navigate to the sickness processing options in a different way. Normally a manager would select My People and then My Team Absence. If there are no employees reporting to this manager they have no My People tab. This can be seen below:



To use the delegation rule click on **My Delegated Responsibilities**. A list of all active delegation rules will appear. If an employee is absent from work and the manager wishes to record their sickness they should click on the **Time Management** option listed under Responsibilities.



A list of the employees you have delegated responsibility for will appear. Click on the employee you wish to record sickness absence for.

Delegated Responsibilities

You have delegated access to this module on behalf of the following people:

Delegated List

MISS EMMA MCGREGOR (Emp: 119130, Post: ASSISTANT)
MISS SOPHIE WATSON (Emp: 109362, Post: RESOURCES ASSISTANT)
MR JOHN SMITH (Emp: 118035, Post: RESOURCE ASSISTANT)
MRS JUDY WRIGHT (Emp: 114904, Post: ADMINISTRATIVE ASSISTANT)

A calendar view will appear for the specific employee.

Navigate to the date on the calendar that you wish to start the sickness absence and right click.

The leave management options will now appear. Select **Add** and **Sickness Absence**.

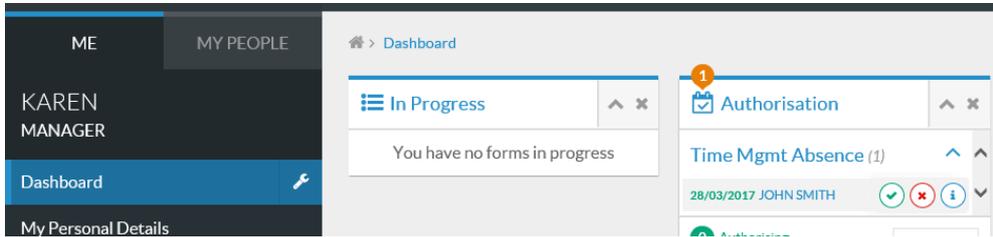
The **Create Sickness Entry** screen will now appear and can be completed with the details of the sickness. Full instructions on updating this screen can be found in the [MyView Sickness Absence Guidance - Managers](#) which can be found on the MyView page on the intranet.

To amend an existing sickness entry the manager would navigate to the calendar view for the employee in the same way (My Delegated Responsibilities, Time Management Module, select the appropriate employee)

Any current sickness would appear on the calendar. The example below is an open ended entry which is running to the end of April.

Annual Leave

If one of the employees has submitted an annual leave request this will appear in the authorisation widget of the manager they report to. See print below:



If the delegation rule is in place the job share manager can also authorise/reject this request. Any annual leave requests will appear in their authorisation widget aswell. As soon as it has been processed by one of the managers it will disappear from the other persons Authorisation widget.

