

TYPE	SET UP INSTRUCTIONS	KEY POINTS
<p>Approval Delegation (Time Card) <i>HCM MODULE</i></p>	<p>Me tab – Roles & Delegations tile – Approval Delegation – click arrow to expand – click Add. Enter Unique Rule Name and Start/End Date Category = Time and Labor Select employee in Delegate To field - Save</p>	<ul style="list-style-type: none"> • Original approver & delegate should understand the requirements for verifying a transaction (i.e., Financial impact of approving or rejecting a time card). • Delegates should have capacity to carry out same level of review as original approver. • Delegation does not relieve the responsibilities associate with the approver, but rather the ACT of approving.
<p>Role Delegation (Visibility for Team Time Card & Hours Monitor Reports) <i>HCM MODULE</i></p>	<p>Me tab – Roles & Delegations tile – Role Delegation – click Add button – Enter “Line Manager” for the Rule name. Enter Start/End Date. Select employee in Delegate To field – Save</p>	<ul style="list-style-type: none"> • Keep in mind, Role Delegations <u>will</u> provide visibility to salary data. • Discuss the importance of confidentiality BEFORE giving this type of access.
<p>Expense Delegation (Expense Report Creation) <i>EXPENSE MODULE</i></p>	<p>Me tab – Expense tile – click the Gear icon in the top right corner of the screen – select Manage Delegates – click the Plus Sign (+) icon – select the Magnifying Glass icon - enter the name of the employee or email - click Search. Highlight the person’s name – click OK – click Save.</p>	<ul style="list-style-type: none"> • This delegation allows another person to enter and submit expense reports on your behalf. • The employee is still responsible for the data submitted on the expense report.

TYPE	SET UP INSTRUCTIONS	KEY POINTS
<p>Vacation Period Approver Assignment (Approval of Expense Reports, Requisitions & Purchase Orders) EXPENSE MODULE (Line Manager approvals) HCM MODULE</p>	<p>Notification bell icon – Show more – Worklist – use dropdown menu in upper right-hand corner to select Preferences. Select Enable vacation period check box. Add Start/End Date. Select Delegate to option – use search icon to locate employee – Save.</p>	<ul style="list-style-type: none"> • Vacation Period Approver Assignment is <u>intended to be used for a short time while the approver is unavailable</u>; the Approval Delegation is intended for longer periods of time. • Delegations through the Bell Notifications can be affected by workflow if the original request for approval was submitted prior to the delegation, or if an item is in a Saved, but not Submitted status prior to the delegation. • Delegation can be given to any user within the organization both upward and downward in the HCM managerial structure. • If the individual to which the transactions are being delegated already has a delegate, then all approval transactions will be delegated to the last employee. • Using the My Rule screen allows you to apply conditional delegations for specific task types.
<p>RECEIVABLES MODULE</p>	<p>N/A</p>	<ul style="list-style-type: none"> • AR transactions cannot be delegated to a specific department approver.
<p>INTERCOMPANY MODULE</p>	<p>N/A</p>	<ul style="list-style-type: none"> • Intercompany transactions cannot be delegated to a specific department approver.

For additional questions regarding Delegations, submit an [Ignite Service Desk Request](#). Be sure to include what you are trying to accomplish with the delegation, so the staff can direct you appropriately.