

Creighton University Human Resources	Guidelines: Approval Delegation myHR
Date: December 1, 2016	

Scope:

The purpose of these guidelines is to provide best practices around the delegation of approvals of Time and Labor (timecard approval) and Absence Approval (e.g. sick and vacation requests) within the myHR system. The delegation of approval enables a manager to allow another manager to approve specific tasks normally performed by the manager.

Guidelines:

1. Delegation of approvals should only be used by a manager when he/she will be absent from work for any reason and will be unable to perform the approval actions.
2. Delegation of approvals should only last for the duration of the absence
 - a. Delegation of approval should not extend beyond 30 days.
 - b. Managers should contact HR to discuss absences extending beyond 30 days.
3. Delegation of approval should not be given to a person lower in the management hierarchy (i.e. a direct report, or person who reports up to him/her through subordinate managers).
Delegation of approval of timecards and absence management to an employee lower in the management hierarchy will allow the employee to approve his/her own timecard and absence request.

Procedure: Time & Labor – timecard approvals

1. The manager will log on to myHR and navigate to the 'My Account' page.
2. On the 'My Account' page the manager will click the plus/add button under the 'Delegate Approvals to Others'
3. Manager will determine a name of the rule and designate the time period covered.
4. In 'category' manager will select 'Time and labor'
5. In 'delegate to' search for the manger by netId
6. Select manager and click 'Ok'
7. Click 'OK'
8. Click 'Save'

Procedure: Absence Management – sick and vacation requests

1. From the home page click on the bell
2. Click 'More Details' and Select 'Human Capital Management' (see screen shot)

The screenshot shows the 'Manager Resources Dashboard' with a sidebar containing icons for 'Manager Resources Dashboard', 'Asset Inquiry', and 'Tools'. The main content area features a 'Recent Notifications' section with a search bar and a list of notifications. A dropdown menu is open next to the user name 'Jason Gerlt', showing options: 'Customer Relationship Management', 'Human Capital Management' (highlighted), and 'Setup and Maintenance'.

Recent Notifications	
Approved:Human resources representative Responsibility Assignment	
Approved:Human resources representative Responsibility Assignment	12/2/16
Approved:Human resources representative Responsibility Assignment	12/2/16
Approved:Payroll representative Responsibility Assignment	12/2/16
Action Required:PAY_REP Responsibility Assignment: Process Was Saved	12/2/16
Approved:Human resources representative Responsibility Assignment	12/2/16
Action Required:HR_REP Responsibility Assignment: Process Was Saved	12/2/16
Approved:Changed Personal Information for Gerlt, Jason E	12/1/16

3. Under name select “preferences” in drop down.

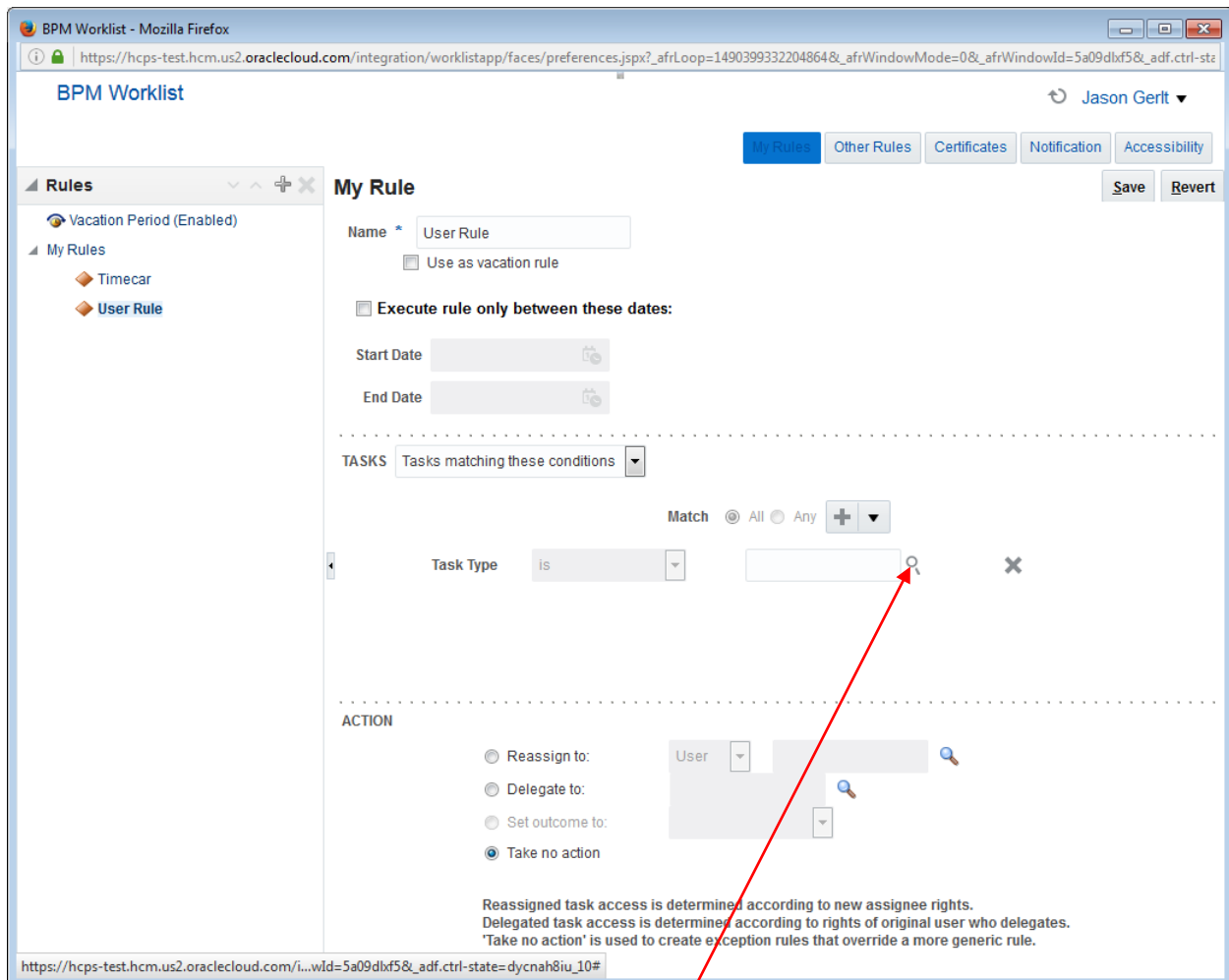
The screenshot shows the 'BPM Worklist' interface. On the left, there are sections for 'Views' (Inbox, My Tasks (9), Initiated Tasks, My Staff Tasks, Administrative Tasks) and 'Views' (Add Person Pending Approvals, Add Person Pending Transactions, Due Soon, High Priority, Past Day, Past Week, Past Month, Past Quarter, New Tasks). The main area displays a table of tasks. A dropdown menu is open next to the user name 'Gerlt, Jason E.', showing options: 'User Details', 'Home', 'Administration', 'Reports', 'Preferences' (highlighted), 'Help', and 'Logout'.

Title	Number	Creator	Assigned
Approval of Vacation Absence Request for Manager, Misty from 20	203623	Misty Manager	
Approval of Time Entries for Employee, Emily Miss from 2016-11-2	203244	Emily Employee	
Approval of Time Entries for Employee, Emily Miss from 2016-11-2	203242	Emily Employee	
Approval of Time Entries for Employee, Emily Miss from 2016-11-2	203240	Emily Employee	
Approval of Time Entries for Employee, Emily Miss from 2016-11-2	203218	Emily Employee	11/10/16 8:19 AM 3
Approval of Time Entries for Employee, Emily Miss from 2016-11-2	203216	Emily Employee	11/10/16 8:19 AM 3
Approval of Time Entries for Employee, Emily Miss from 2016-11-2	203214	Emily Employee	11/10/16 8:19 AM 3
Approval of Time Entries for Employee, Emily Miss from 2016-11-2	203212	Emily Employee	11/10/16 8:19 AM 3
Approval of Time Entries for Employee, Emily Miss from 2016-11-2	203210	Emily Employee	11/10/16 8:19 AM 3

- Click on 'My Rules' then click on the '+' sign (add)

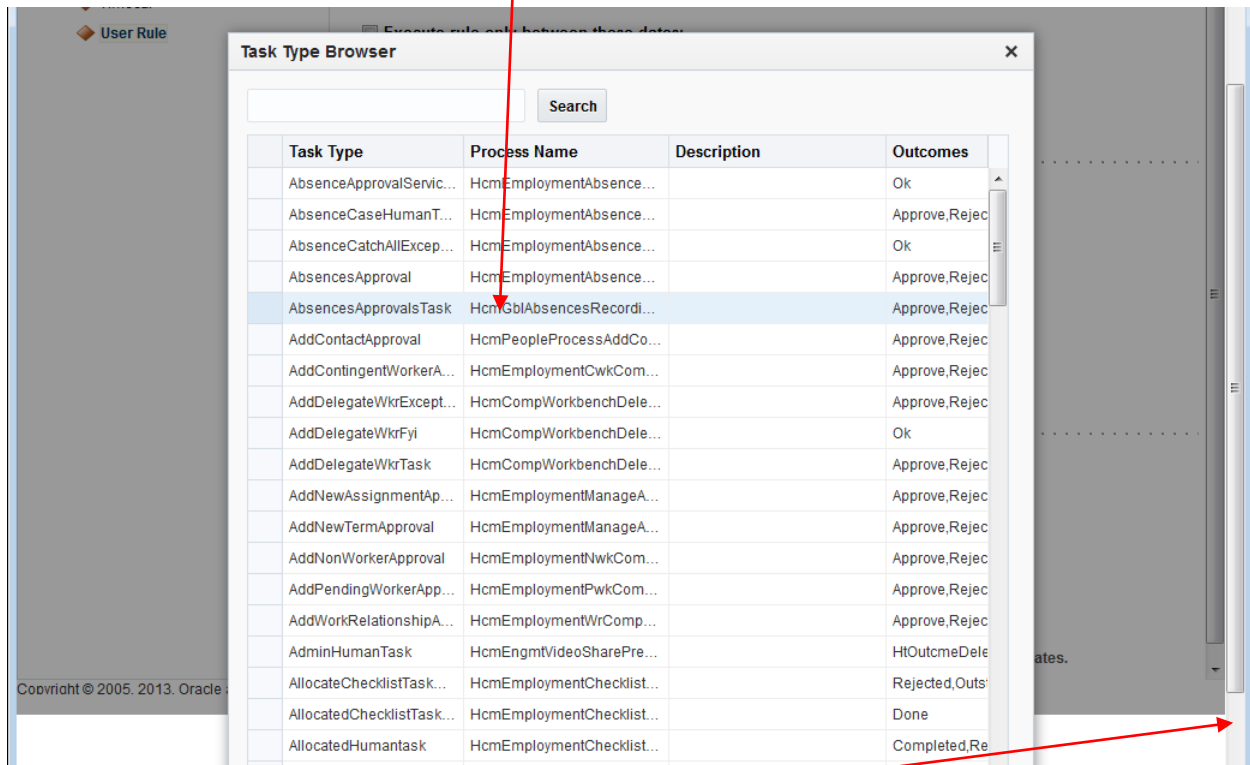


- You should see the following screen



- Enter a name for the rule
- Click 'Execute rule only between these dates:'
- Enter a start and end date
- In the middle section click on the magnifying glass to search for the task

10. Select 'HCMBblAbsenceRecording'



11. Scroll down and click 'OK'

12. In the lower section of the screen (Action) click the radial button 'Delegate To'
13. Click the magnifying glass as search for user

My Rules

- Timecar
- User Rule

name: User Rule

☐ Use as vacation rule

☐ Execute rule only between these dates:

Start Date:

End Date:

TASKS Tasks matching these conditions

Match: ☒ All ☐ Any

Task Type: is AbsencesApprovalsTa

ACTION

☐ Reassign to:

☒ Delegate to:

☐ Set outcome to: REJECT

☐ Take no action

Reassigned task access is determined according to new assignee rights.
Delegated task access is determined according to rights of original user who delegates.
'Take no action' is used to create exception rules that override a more generic rule.

14. Enter user name or first and last name and click search
15. Select user and click 'OK'

Identity Browser

Users: mob

☐ Advanced

First Name: Last Name:

Email: ID:

Search Reset

Select	First Name	Last Name	Email	Title	Manager	Organization
<input checked="" type="radio"/>	Molly	Billings	mob16072@cr...		jcb49009	

OK Cancel

16. Click save
17. Exit out of BPM
18. To verify rule navigate to 'My Account'