

## Manager Self Service Delegated Access: Guide for delegating managers and delegated users

This guide provides general information on Manager Self Service Delegated Access. Delegating managers and delegated users must read this guidance as part of the delegating access agreement.

### What is Manager Self Service Delegated Access?

Delegated access enables an authorised person to have access to and submit Self Service processes on a manager's behalf.

Example: An administrative member of the team can use it to submit team claims, record staff absence, enrol staff onto training courses etc.

The tools available to a user with the responsibility Manager Self Service Delegated Access are:

Change Hours	Change Manager
Change Contract Title	Change Location
Absence Reporting	Enter Team Claims
View My Employee's Expenses	View My Employee's Claims
Employment Termination	Learning Manager

**Any process that a delegated user submits will require approval by the delegating manager.**

**Users of the Delegated Access responsibility must ensure they take all security measures possible, particularly if accessing remotely. Please ensure you have read and abide by the HR Self Service Privacy and Terms of Use document at all times.**

### Notes for delegating managers:

**I want to delegate access and I have more than one assignment:**

You must make sure that the delegated access you give is against the relevant assignment.

Example: A delegating manager has 2 roles; a Manager role OAN 123456 and a Permanent Relief role OAN 123456-2. When completing the Delegated Access Entry screen the manager needs to select the assignment that they are giving delegated access for i.e. their management role OAN 123456.

**Giving delegated access at the right level:**

As a delegating manager, you should ensure you give delegated access at the right level.

Example: A grandparent manager gives delegated access to a 'grandchild' user and so receives notifications to action. It may be more appropriate for the notifications to go to the

immediate line manager. It may be that this line manager should therefore give delegated access to the user. Alternatively, the grandparent manager can use the 'Reassign' facility to transfer notifications if required.

#### **Receiving and authorising notifications from a delegated user:**

When your delegated user submits a transaction, as the delegating manager you will be sent a notification and need to action this as appropriate.

As with all Self Service notifications, you should action this as soon as possible. Notifications need to be approved by 10th of the month, in order to be processed for that month's payroll if relevant. If you do not action a notification within 10 working days, the notification will time out, but it will be automatically re-submitted to you.

#### **What should I do if there are mistakes or I need to query the information a delegated user has submitted?**

As with notifications you receive from employees, there are several options available:

- **Return for Correction** - if you use this option, the delegated user will be able to amend the information and submit this back to you. **To ensure that the transaction is processed correctly, when amending and re-submitting the details, the delegated user must ensure that their responsibility is set to 'Manager Self Service Delegated Access'**. Please see the return for correction guidance in the Notes for delegated users section for more information.

Please be aware that the return for correction option is not enabled for Change Manager or Reverse Termination transactions. If a mistake has been made and the transaction should not proceed further you will need to reject it.

- **Reject** - if you reject a transaction the delegated user will not be able to amend it. They will be advised that it has been rejected. They will need to submit a new transaction if required.
- **Request Information** - use this option if you need to query something submitted by a delegated user. They will be prompted to respond. Depending on their response, you can approve, return the transaction for correction or reject it.

#### **What if I am away and not able to authorise my notifications?**

You must ensure that your Self Service vacation rule is set, so that notifications are automatically diverted to an alternative approver to action on your behalf. This should be a manager at the same level or higher than you. If your vacation rule is set to the delegated user and they submit a transaction, they must not approve the notification. They must reassign the notification to an alternative appropriate approver to action.

#### **What happens if I am going to leave KCC or the assignment I have given someone delegated access to?**

The delegated user will lose their delegated access. If required, the new manager will need to give delegated access to the user.

If you leave your current manager role (e.g. you change team) but your assignment number (OAN) remains the same, if your delegated user should no longer have access, you must ensure that you end date their access. Please refer to the note below on 'Ending a delegated user's access'.

#### Ending a delegated user's access:

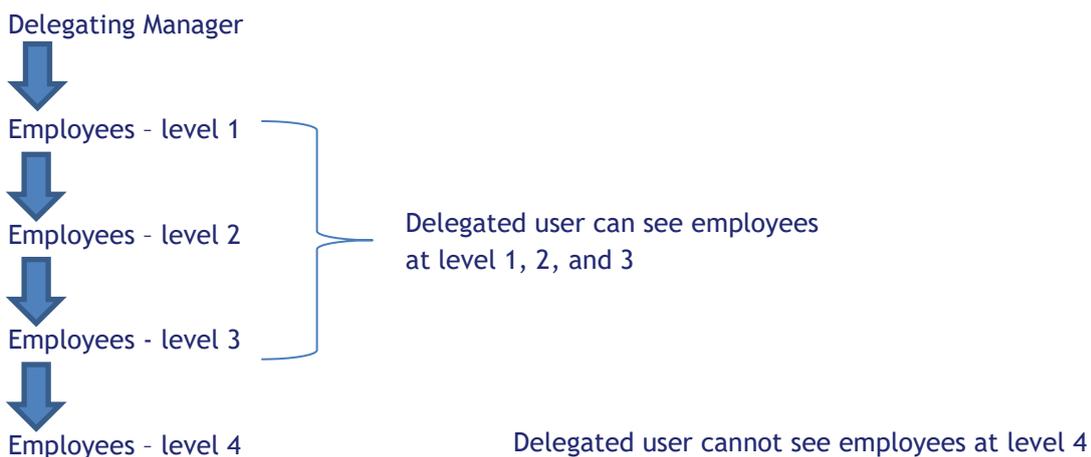
If a user should no longer have delegated access (e.g. because they have left your team or you have changed teams) you must end date their access. Please refer to the section 'Updating details for an existing delegated user' in the Delegate Manager Self Service Entry quick guide.

### Notes for delegated users:

#### Who you can see under your Manager Self Service Delegated Access responsibility:

You will be able to see employees who are 1-3 levels down in the reporting hierarchy from the delegating manager. If there are employees further down the reporting hierarchy than this, you won't be able to see or process transactions for them on behalf of this manager:

Example:



If you need to process transactions for someone you can't see, the appropriate manager further down the hierarchy would need to give you delegated access.

Please note that when using the delegated access responsibility, you will not be able to select the delegating manager or yourself.

#### What if the delegating manager has more than one assignment?

When a manager gives you delegated access, they are required to pick the assignment they are giving you access for, so you will only have delegated access relating to that assignment. Please see the 'I want to delegate access and I have more than one assignment' guidance in the Notes for delegating managers section.

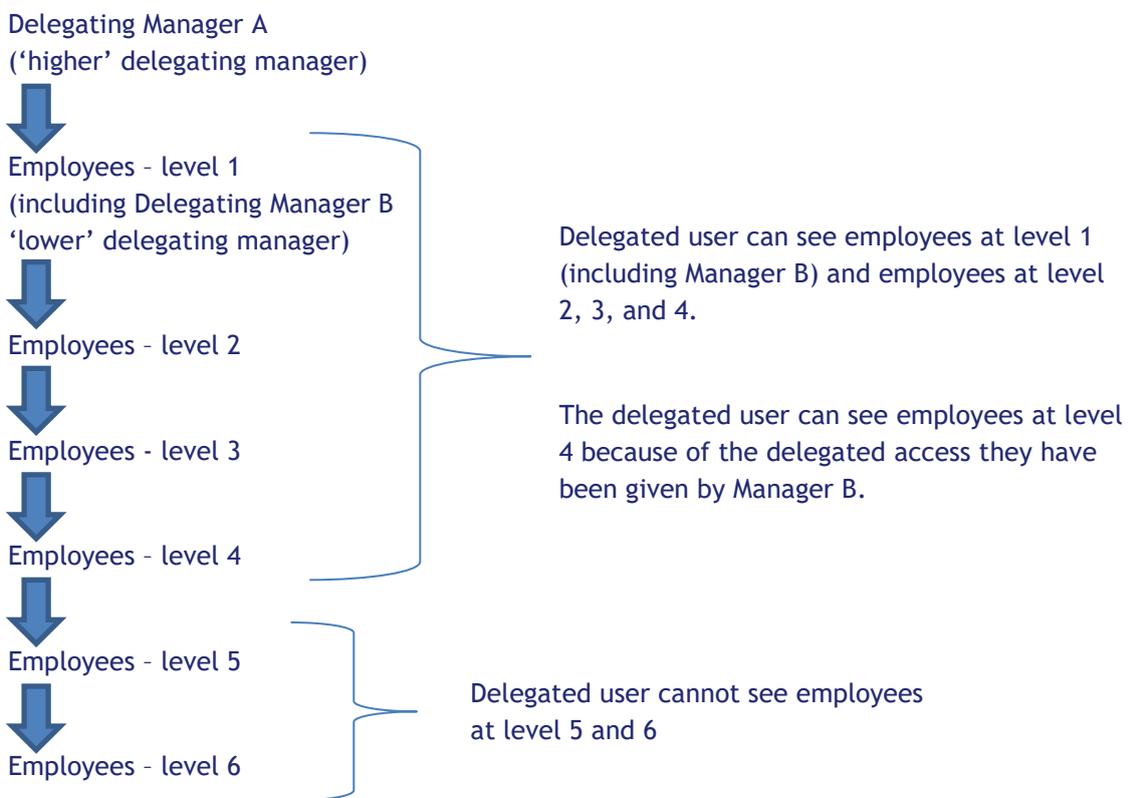
#### What if I have been given delegated access by more than one manager?

When processing a transaction, you will be prompted to select the relevant delegating manager’s assignment and then select the relevant employee within their reporting hierarchy.

**Who will I have access to if I am given delegated access by more than one manager and they are within the same reporting hierarchy?**

If you select the ‘lower’ delegating manager’s hierarchy you will see employees who are 1-3 levels down in that hierarchy. If you have selected the ‘higher’ delegating manager’s hierarchy you may also be able to see employees that are beyond 3 levels down from that manager. This is because of the access you have been given by the ‘lower’ delegating manager.

Example:



**Who will I have access to if I am given delegated access by more than one manager, and they are not within the same reporting hierarchy?**

You will be able to see employees who are 1-3 levels down in the reporting hierarchy from each delegated manager. You will not be able to see employees in Manager C’s hierarchy if you have selected to submit a transaction on behalf of Manager D.

**What will I be able to see for employees who have multiple assignments which report to different managers?**

You will only be able to see the assignments that you have been given delegated access to.

### Who will authorise my delegated user transactions?

On the review screen the Approvers section will show who the transaction will be sent to for authorisation. This will be the delegating manager and also in some cases the HRBC Approver or Learning & Development Approver, if authorisation is also required by HR e.g. for terminations, change of hours, training course requests.

If you have delegated access from more than one manager within the same reporting hierarchy, the delegating manager who is closest in terms of line management level to the employee/s the transaction is for, will be sent the notification to action.

Please note that if the manager of the employee is not the delegating manager, a notification **will not** be automatically sent to advise the manager that you have submitted this transaction.

The only exception to this is a team claim. Once the claim is approved, an FYI notification will be sent to the manager of any employees that are not managed by the delegating manager. The notification will only list the employees that report to that manager. It will outline the claim details you have submitted.

Once a transaction has been approved, if appropriate a 'For Your Information' notification will be sent to the employee to advise them that a change has been made to their record/claim has been submitted on their behalf.

### What should I do with transactions that are Returned for Correction?

If a transaction you submit contains an error, the delegating manager may return it to you for correction. To ensure that the transaction is processed correctly, you **must not** click on the return for correction notification that is displayed on the Oracle Applications Home Page.

**If a change of contract title, hours, location or termination transaction is returned to you for correction:**

You must select the 'KCC Manager Self Service Delegated Access' responsibility on the left hand side of the Oracle home page and then click on 'All Actions Awaiting Your Attention'. The return for correction notification will be displayed. Click on the Subject title and the notification will open.

If you wish to delete the transaction, click on the 'Delete' button.

If you wish to make the required changes click on 'Continue Action', which is located towards the bottom left of the notification. You will be taken through the same screens as when you originally completed the details. In the top left of the screen it should confirm that you are completing the details under the 'KCC Manager Self Service Delegated Access' responsibility. Ensure that you input the correct details and on clicking on 'Submit' the amended details will be sent to the delegating manager to authorise.

If you do click on the notification from within the Oracle Applications Home Page and click on 'Continue Action', the system will not know what responsibility you are submitting the



transaction under. An 'Information' section at the top of the screen confirms the 'responsibility context' being used. If this does not say 'KCC Manager Self Service Delegated Access', you must select this from the 'Switch Responsibility' drop down list on the right hand side of the screen (see screen shot below).

**If a Team Claim is returned to you for correction:**

You **must not** click on the return for correction notification if it is displayed on the Oracle Applications Home Page.

Instead, you must select the 'KCC Manager Self Service Delegated Access' responsibility on the left hand side of the Oracle home page and then click on 'Enter Team Claims'.

You will be taken to the claims home page. The status of the relevant claim will say 'Returned for Correction'. Click in the 'Select' box next to the claim, and then click on the 'View Claim Details' button. The details of the claim will be displayed. If the delegating manager has made any comments about the claim these will not be shown. You will need to refer to the e-mail notification you will have received as this will contain any comments the delegating manager has made.

To amend the claim click on the 'Edit Claim Details' button. You will be taken through the same screens as when you originally completed the claim. In the top left of the screen it should confirm that you are completing the details under the 'KCC Manager Self Service Delegated Access' responsibility. Input the correct details and click on 'Submit'. The amended claim will be sent to the delegating manager to authorise.

Please be aware that the return for correction option is not enabled for Change Manager or Reverse Termination transactions. If a mistake has been made and the transaction should not proceed further the delegating manager will need to reject it. You will need to submit a new transaction with the correct details if required.

Guidance for how to deal with a transaction if it is returned for correction is included in the quick guide for each tool.

**What happens if my delegating manager is away and not able to authorise my transactions?**

Your delegating manager must ensure that their Self Service vacation rule is set, so that notifications are automatically diverted to an alternative approver to action on their behalf. This should be a manager at the same level or higher than them.

If you are a manager and the delegating manager has set their vacation rule to you, you must not approve any delegated user transactions you submit. You must reassign the notification to an alternative appropriate approver to action.

**What happens if my delegating manager leaves?**

If the manager who gives you delegated access leaves KCC or the role that they gave you delegated access for, then your delegated access will end. If you still require delegated access the new manager will need to complete the delegated access process.

**What happens if I leave the team but do not leave KCC?**

The delegating manager will need to end date your delegated access.

## Help and Support:

Further information and quick guides are available on the 'Manager Self Service Delegated Access' KNet page. If you are not able to access KNet the quick guides can be found at <http://www.kent.gov.uk/owa/hr-self-service-remote-access>