



Manager Delegation

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Author: Dan Billings

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Overview

This document provides guidance on how the Delegation widget on the Manager Dashboard can be used by managers to automatically reassign their line management responsibilities to other managers.

Delegation can only be granted to other users that already have management responsibilities and are in the same Directorate as the manager delegating responsibility.

Delegation should only be used for temporary periods of absence, for example if a manager is on annual leave or short periods of sick leave. If it is a permanent change of line management (or a long term absence), then the request for this needs to go through the normal process.

Managers with delegated responsibility can: -

- View Employee Profile (Please note they are unable to access the HR Dashboard).
- Sign off and update Timesheets.
- Sign off and update Leave.
- Create and update Absences.
- Sign off and update Expenses.

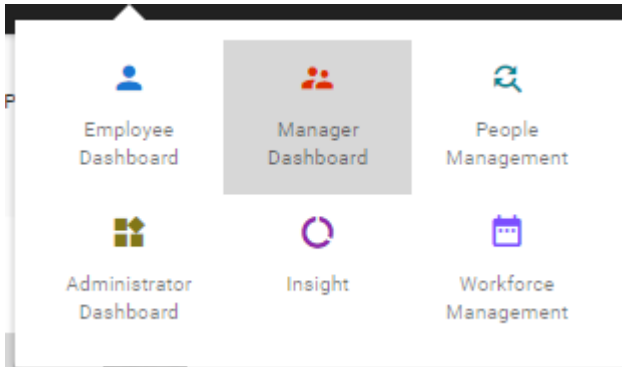
For the period of delegation, the delegated manager will appear as the employee's line manager.

Please be very careful when assigning delegation to another manager to ensure that you have picked the correct person. Assigning delegation to the incorrect person will mean that they have access to staff's personal and contractual details.

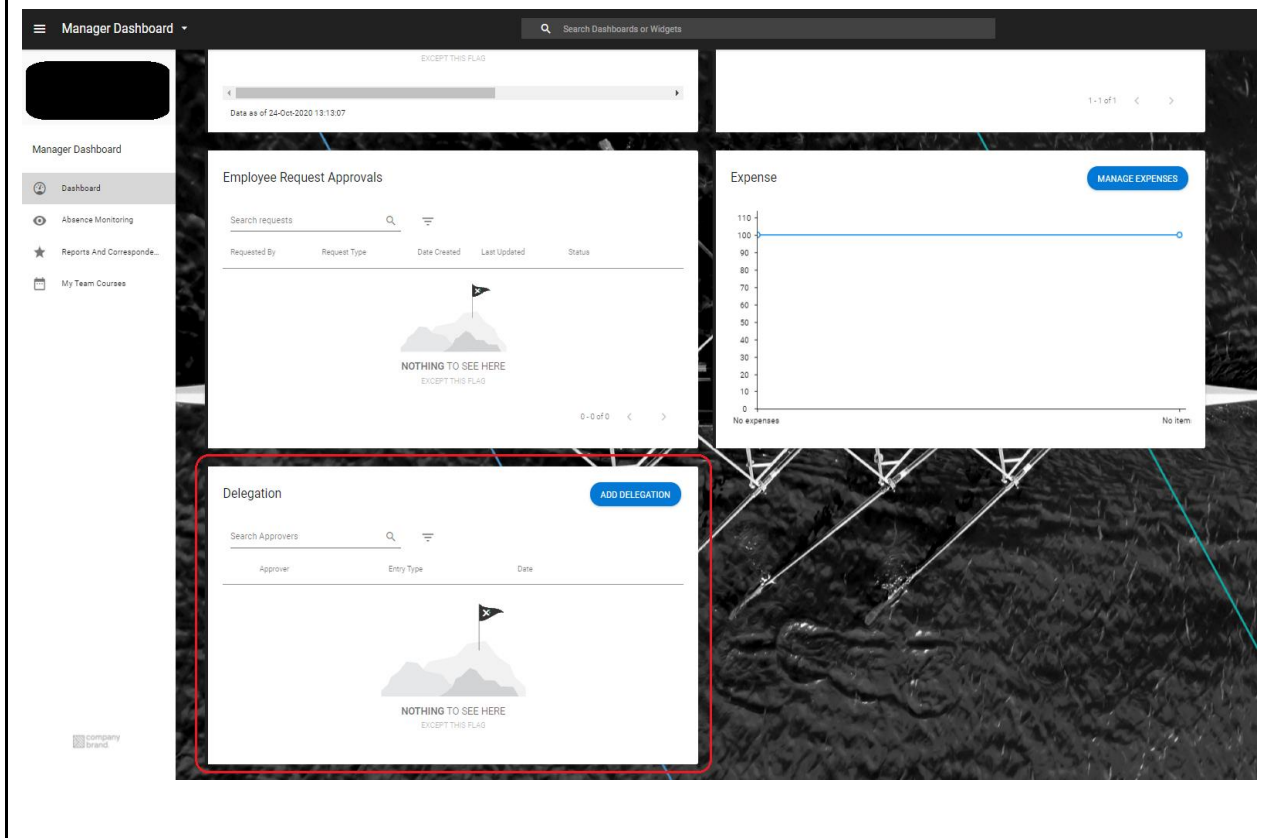
Manager Dashboard - Delegation Widget

Where to Find the widget

1. Log into CoreHR and select the Manager Dashboard.

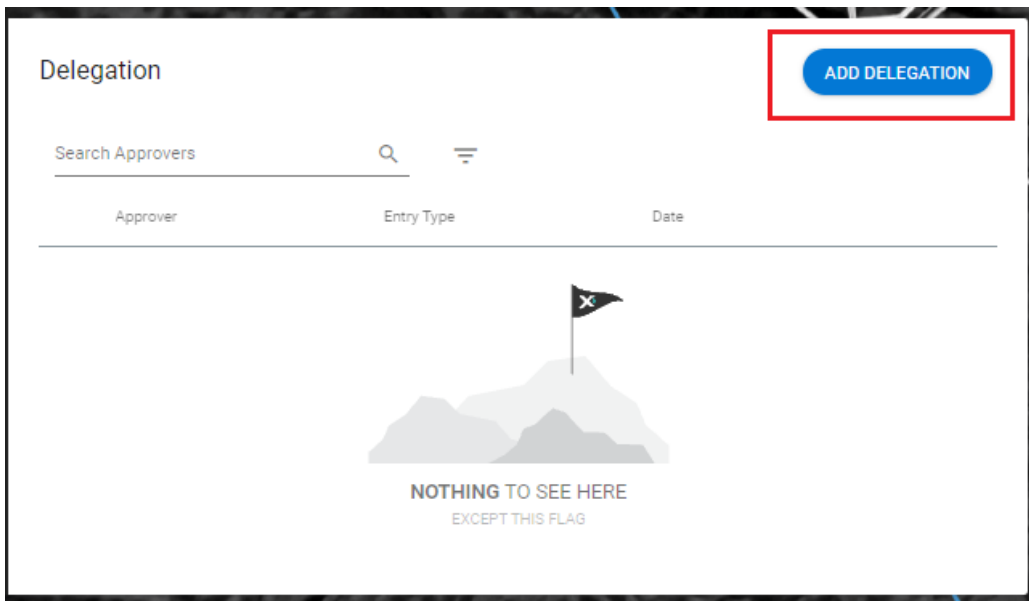


2. Scroll to the bottom of the screen and you will see the Delegation Widget



Using the Delegation Widget

1. The Delegation widget will show any current delegation in place or any previous delegation you have set up.
2. To add a new period of delegation, select the Add Delegation button at the top right of the widget.



3. This will bring you the screen below.



4. Enter the following details.

Entry Type - Org Role

From Date – The date from which the delegation will be effective from

Delegate to – Pick from a list of other managers within your Directorate. You can do a dynamic search by typing in the manager’s name or personnel reference number.

To Date – Enter the date the delegation period will end. If you do not know this, then you can leave this blank. However, this will mean that the delegation will remain in place indefinitely and you will need to remember to end this when you return to work.

Reason – Enter a brief description of why the delegation is in place (e.g. Annual Leave)

Select the Reports To Manager role (**On occasion, the number of employees you will see in the ‘Reports to Manager’ line (highlighted in yellow below)– may vary to the number of employees you actually manage – some employees can show more than once. We are aware of this issue. You can click on the ‘SHOWEMPLOYEES’ button and a list will appear) It is ok to accept this odd number as the system will only allow the correct staff to be delegated.**

I authorise this individual to approve on my behalf

<input checked="" type="checkbox"/> Org Role Name	Number Of Employees	
<input checked="" type="checkbox"/> Reports To Manager	38	SHOW EMPLOYEES

5. Tick the **I authorise this individual to approve on my behalf** box and hit save. The delegation is now in place.

Add Approver Delegation
 Manager Dashboard > Add Approver Delegation

Entry Type*
 Org Role

From Date*
 15-Nov-2021

To Date
 30-Nov-2021

Reason
 Annual Leave

I authorise this individual to approve on my behalf

<input checked="" type="checkbox"/> Org Role Name	Number Of Employees
<input checked="" type="checkbox"/> Reports To Manager	51

What Items will be delegated to the delegated manager?

Managers with delegated responsibility can: -

- View Employee Profile (Please note they are unable to access the HR Dashboard).
- Sign off and update Timesheets.
- Sign off and update Leave.
- Create and update Absences.
- Sign off and update Expenses.

Frequently Asked Questions

Why are the Number of Employees different to the number of employees I manage

On occasion, the number of employees you will see in the 'Reports to Manager' line may vary to the number of employees you manage. Some employees can show more than once. We are aware of this issue. If you want to double check this, please click on the 'SHOW EMPLOYEES' button and a list will appear. It is ok to accept this odd number as the system will only allow the correct staff to be delegated.

The person I want to delegate to isn't appearing in the list of managers?

Only employees that are in your directorate and are already managers will appear here. If you need to delegate to an employee that doesn't have existing managerial responsibility or isn't within your directorate then you will need to raise a service request for this in Service Now. The request you will need to choose is called - **CoreHR Delegate Managerial Responsibilities**

Can I delegate to more than one manager?

Yes – you can have multiple delegations running concurrently. But please note that if the delegation is relating to expenses, the employee can only choose one delegated manager and not multiple managers.

Can I delegate some of my staff to one manager and the rest to another manager?

No – You can't split your staff across multiple managers. You can delegate all your staff to multiple managers, but you cannot pick and choose which staff members get delegated to each manager.

I have delegated to the wrong manager – can I change this?

Yes – on the Delegation Widget select the ellipsis on the incorrect line. You can either choose edit and then change manager from here, or select delete to remove completely.

I have entered the wrong dates – can I change this?

Yes – on the Delegation Widget select the ellipsis on the incorrect line. You can either choose edit and then change dates from here, or select delete to remove completely.

I am away from work unexpectedly – how can I set up delegation?

You can access the delegation widget from your mobile phone or personal device (e.g. Tablet/home computer). Log in to CoreHR on your mobile/personal device as usual and then navigate to the manager dashboard. Scroll through the widgets until you get to the delegation widget and then follow this guide. Alternatively, you can ask your manager to raise the CoreHR Manager Delegate Managerial Responsibilities via Service now when you report your absence to them.

Employee is advising they have submitted an Expenses Claim, but the delegated manager cannot see this

The Expenses Module does not automatically send to the delegated manager.

When employees create changes in Expenses, please ask them to follow these instructions: -

New Expenses Claim

Simply ensure the Employee selects the correct manager’s name in the Approver field – any delegated manager names will appear in this drop-down field.

Employees can go into their expense claims and un-submit the claim, make the change adding the correct delegated manager and then resubmit – the delegated manager will then receive the notification of the expenses claim

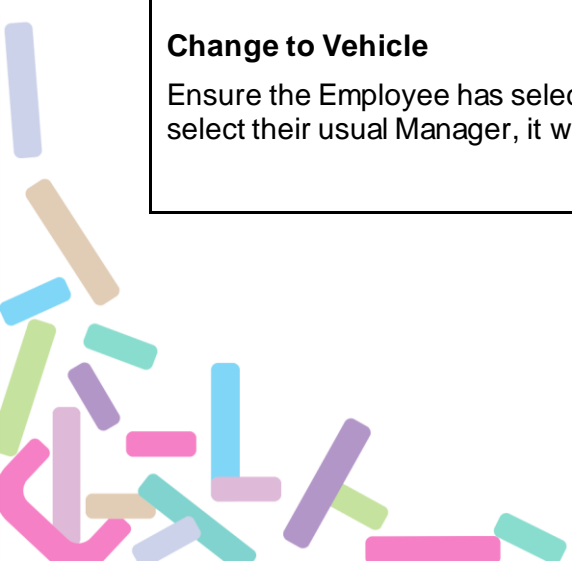
Employee is advising they have submitted an Update to their Vehicle, but the delegated manager cannot see this

The Expenses Module does not automatically send to the delegated manager.

When employees create changes in Expenses, please ask them to follow these instructions: -

Change to Vehicle

Ensure the Employee has selected the Delegated Manager from the Approver Field – if they select their usual Manager, it will not redirect itself to the delegated manager.



Employee is advising they submitted something for approval before their normal manager went off that wasn't approved

Time Claims

The delegated manager will still be able to sign off the hours as normal

Leave requests

The employee will need to cancel the existing leave request and re-submit for it to go to the delegated manager

Expense Claims

The employee will need to 'un-submit' their expenses claim, change the manager and then re-submit the claim

Employee is advising they submitted something for approval to the delegated manager that wasn't approved

Time Claims

The delegated manager will still be able to sign off the hours as normal

Leave requests

The original manager and the delegated manager will both be able to sign off Annual Leave at

Expense Claims

The employee will need to 'un-submit' their expenses claim, change the manager and then re-submit the claim

