Self-Service Delegations Guide

Welcome to the Self-Service Delegations Guide which will provide information on how you manage holiday and sickness absences for employees who have been delegated to you.

If a manager is on long term leave, or if you are a team admin in your School/Unit, you may have employees delegated to you, delegations can also be applied where more than one manager requires visibility of a team. Delegations can either be temporary, with a confirmed end date or permanent.

Delegations can provide different levels of access for sickness and or/annual leave requests:

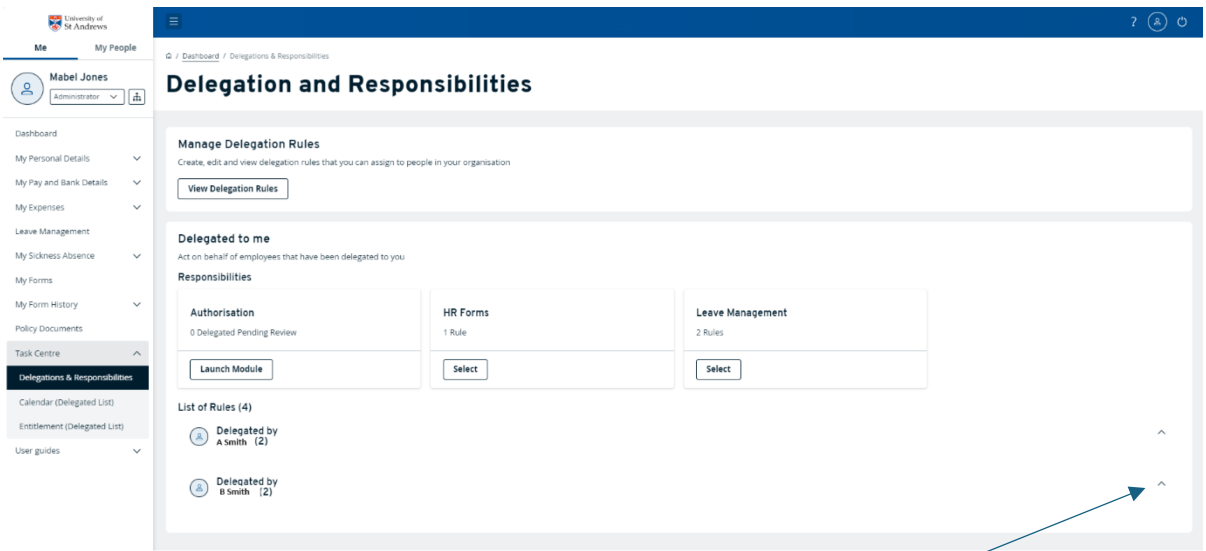
Delegation Type	Description
Approval only	Able to approve requests but not submit them on behalf of others.
View only	Read only access to leave calendars and requests
Approve and Submit	Able to view, approve and raise requests on behalf of others.

To access and action any delegation requests you need to click on **Task Centre** in the left-hand navigation pane to see the following options:

- [Delegations and Responsibilities]
- [Calendar and Entitlement (Delegated Lists)]
- [Frequently Asked Questions (FAQs)]
- [Need Further Assistance?]

Delegations and Responsibilities

The actions available to you are displayed by type, and a full list of the responsibilities that have been delegated to you are available.



To view the details of the rules that have been set up, click the chevron.

Within this screen the following actions can be taken:

Section	Description	Process
View Delegation Rules	• View all delegation rules assigned to you • This also includes rules which have since ended.	• Click into the description of a rule to see details including start and end dates
HR Forms	• View details of a previously submitted Sickness Forms • Create new Sickness Forms	• Click **select** to view the rules. • Click the appropriate rule • Select the employee from the list To view the details of a previously submitted form click on the description for the relevant form. To create a new form, select the appropriate option from the dropdown and click **Complete Form**
Authorisation	• View and action leave requests and sickness	• Click into **Event Type** and **Select all,** only the event types for requests you have waiting to authorise will appear here. • Click into **Employee** and **Select all** or select the employee you wish to view leave requests and sickness for. You can approve or reject the leave using the authorisation buttons on the right.
Leave Management	• View the leave calendar and book leave for delegated employees via create new form • View past annual leave requests via view existing form	• Click **select** to view the rules • Click the appropriate rule • Select **create new form** to view leave calendar or **view existing form** for form history • If you have selected **create new form** select the employee from the list who you wish to view the **Leave Calendar** for The date range can be changed using the chevrons. Book leave requests by clicking onto a date field in the calendar, then select **book new leave**.

Calendar and Entitlement (Delegated Lists)

These menu options will allow you to view the calendar for delegated employees, a delegated team calendar or their entitlement.

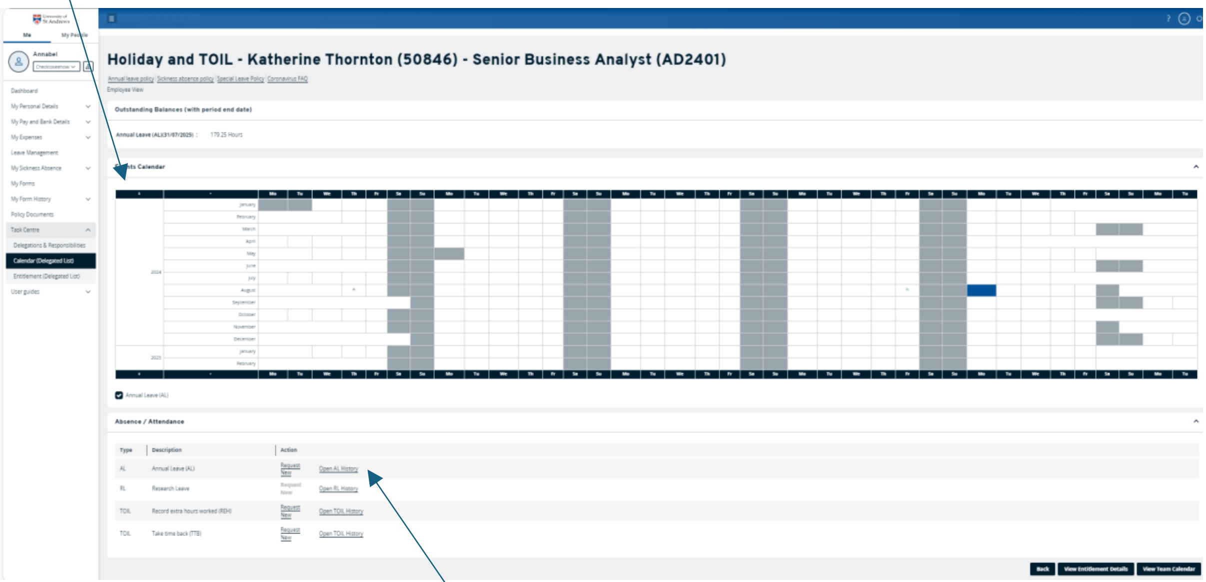
First, from the left-hand navigation pane click either the **Calendar (Delegated List)** or **Entitlement (Delegated List)** and then you can:

- Either search for the employee whose calendar or entitlement you want to check OR
- Click on the chevron next to the relevant manager and click on the radio button next to the employee you want to view.

Calendar (Delegated List)

The calendar screen includes, the employee's outstanding balance (with all leave booked deducted), the events calendar and the types of attendance you have access to.

The default team calendar view is the previous, current and next month; however, you can use the month/year chevrons to move the period displayed forward and backwards as required.

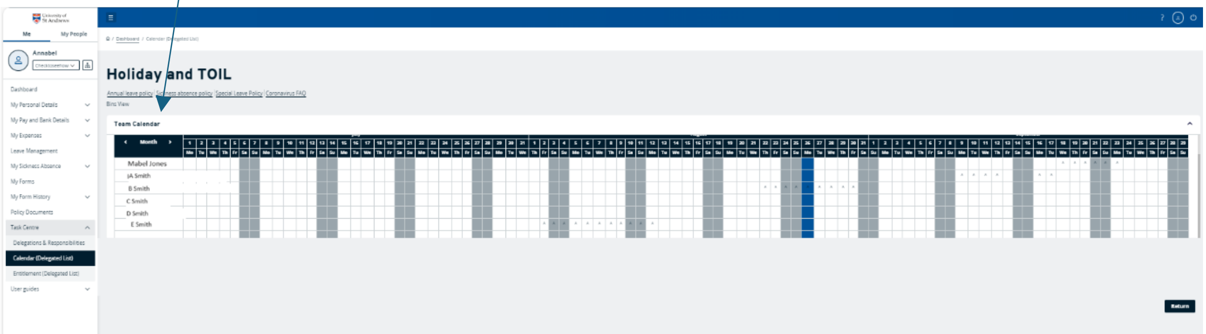


If you scroll below the calendar, clicking **View AL History** will open the history at the bottom of the screen. From here you will see the options to view, edit and delete.

Created Date	Employee	Type	Description	From	To	Action
04/07/2024	A Smith	AL	Annual Leave (AL)	27/12/2024	31/12/2024	View Edit Delete
04/07/2024	A Smith	AL	Annual Leave (AL)	02/12/2024	02/12/2024	View Edit Delete

Scroll to the bottom of the screen or minimise the sections using the chevron on the right of each will allow you to view the following options:

- **View Team Calendar -** Displays all delegates under the relevant manager selected initially. The default team calendar view is 3 months: previous, current and next. You can use the month/year chevrons to move the period displayed forward and backwards as required.



- **Back –** Returns you to the employee selection screen.
- **View Entitlement Details**, select annual leave from the drop down and you will go to the current entitlement for the employee.

Entitlement (Delegated List)

The entitlement screen will show the employee's entitlement, leave carried forward from the previous year, along with taken and booked leave (leave which is yet to have occurred).

You can use the **previous** and **next** buttons to view entitlements for past and future years.

Frequently Asked Questions (FAQs)

In what scenarios should delegations be applied?

Delegations can be applied when:

- A manager goes on long term or unexpected leave.
- Multiple managers are required to have visibility of leave/sickness within a team
- A School/Unit team Administrator who has responsibility for actioning leave request/sickness forms.

I'm going on maternity leave and need someone to be able to approve and submit requests for my team – is this a delegation?

No, leave lasting longer than a few months e.g. maternity or shared parental leave needs to be recorded as a line manager change

How do I delegate employes to another manager?

If you wish to delegate your employees, please email hrsystems@st-andrews.ac.uk with the following information:

- Who you are delegating the approvals to
- The date range that this delegation should be active for
- The Self-Service modules the delegations should be put in place for (e.g. Holidays, Sickness)
- If the delegation is for approval only or for full access as a Team Admin or Super User

When requesting delegations to be set up, please also include the employee receiving the delegation into the email request.

Can I still approve absences for employees who I have delegated to another manager?

Yes, you will still be notified of absences for your direct reports and be able to authorise them.

I've got a notification to approve, but there is nothing to action – what do I do?

Usually this means another manager has already authorised the absence. Check with the employee to see if they have received notification of approval. The employee can also check from their own self-service who has authorised their absence.

How do I know whether I need to action a notification from a delegate?

This will come down to the agreement you have made with the employee's line manager as the delegated approver, e.g. are you only to approve when the line manager is absent.

Need further assistance?

- Annual Leave Policy and Guidance
- Delegation rule queries - hrsystems@st-andrews.ac.uk
- Line Management changes – hrdata@st-andrews.ac.uk

We are also always interested to hear your comments. Use the HR Services feedback form to tell us about your experience on the HR Self Service or any of the HR systems.