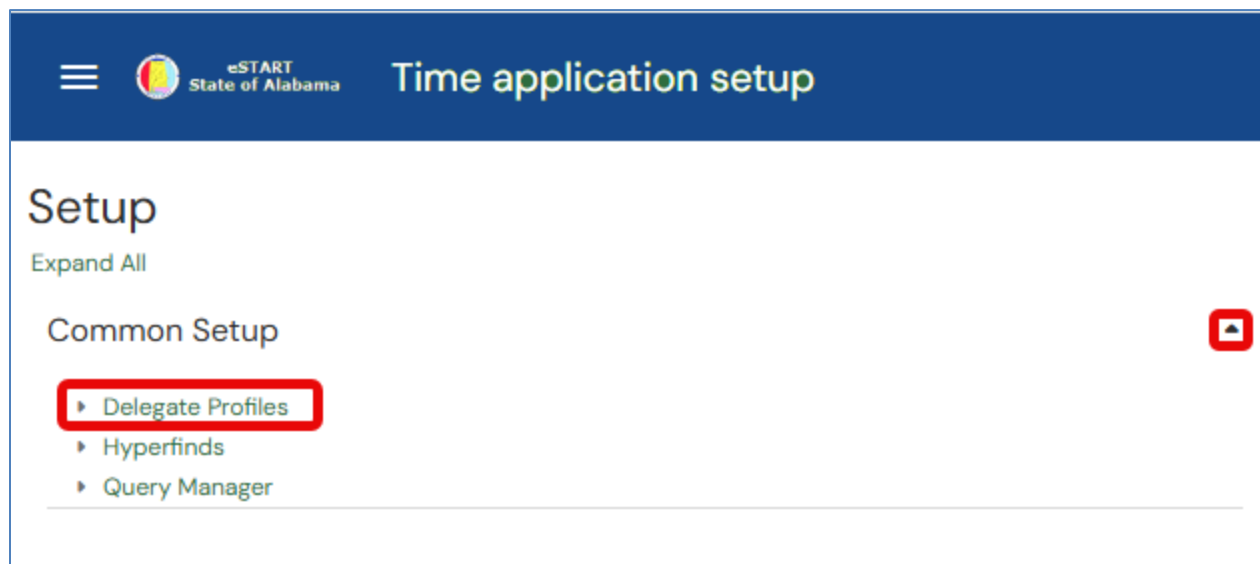


Overview

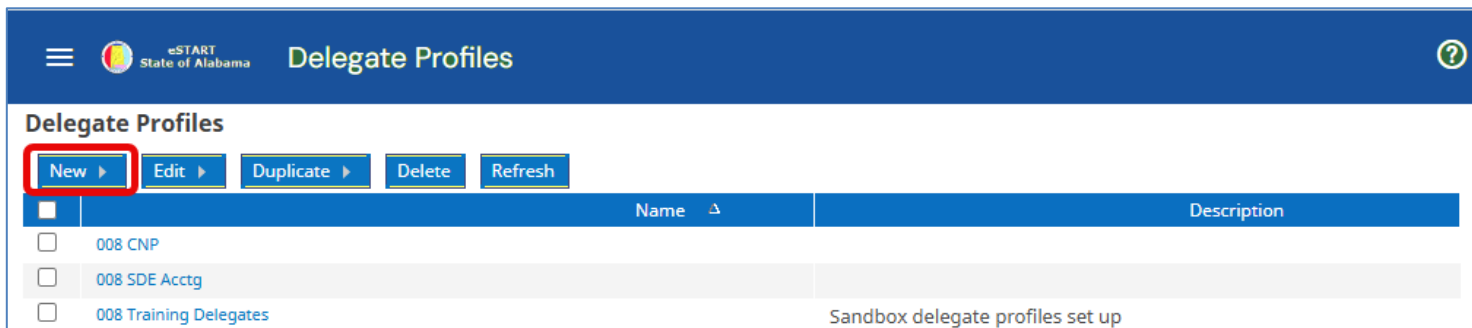
Delegate Profile Setup is a two-step process to be completed for each manager group in the agency to allow manager delegations. Available managers are added to the profile which allows access to the delegation process.

Step 1- Delegate Profile Group Setup

1. From the **Main Menu** , under **System Configuration**, select **Time Application Setup**. The **Time Application Setup** page displays in a new tab.



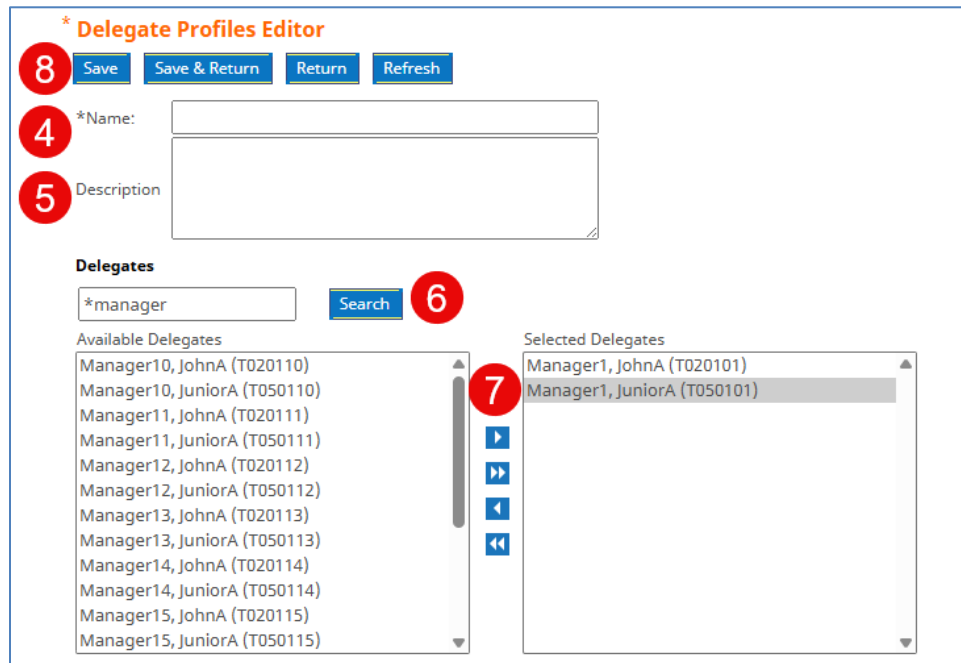
2. Click **Common Setup** to expand the list. Click **Delegate Profiles**. The **Delegate Profiles** page display.



3. Select **New**.

Delegate Profile Setup for Agency Administrators

The **Delgate Profiles Editor** displays.



The screenshot shows the 'Delegate Profiles Editor' interface. At the top, there are buttons for 'Save', 'Save & Return', 'Return', and 'Refresh'. Below these are input fields for '*Name:' and 'Description'. A 'Delegates' section contains a search input field with '*manager' and a 'Search' button. Below the search field are two lists: 'Available Delegates' and 'Selected Delegates'. The 'Available Delegates' list contains 15 entries, each with a manager name and ID. The 'Selected Delegates' list contains two entries. Numbered callouts (4-8) point to the Name field, Description field, Search button, Available Delegates list, and the right arrow button between the lists.

4. Enter the name of the profile group in the **Name** field.
5. (optionally) Add a **Description**.
6. Select the Search button to retrieve a list of available managers. To narrow the search, enter a letter or letters of the last name in front of the asterisk (*), then select **Search**.
7. The **Available Delegates** display. Select the **desired** delegate(s), then select the right arrow button  to move from **Available Delegates** to **Selected Delegates**.

Note: To select more than one delegate, hold down the CTRL key and click on each name, then the right arrow button. Additionally, if a new manager is added, the agency will need to manually add the new manager to the delegate profile.

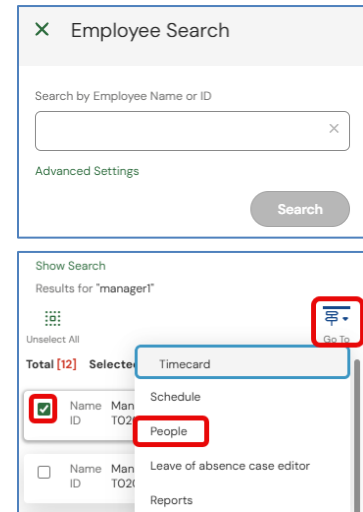
8. Once all managers have been added, click **Save**.
9. Close the Delegate Profile tab.

Delegate Profile Setup for Agency Administrators

Step 2- Assigning the Delegate Profile to the People Record.

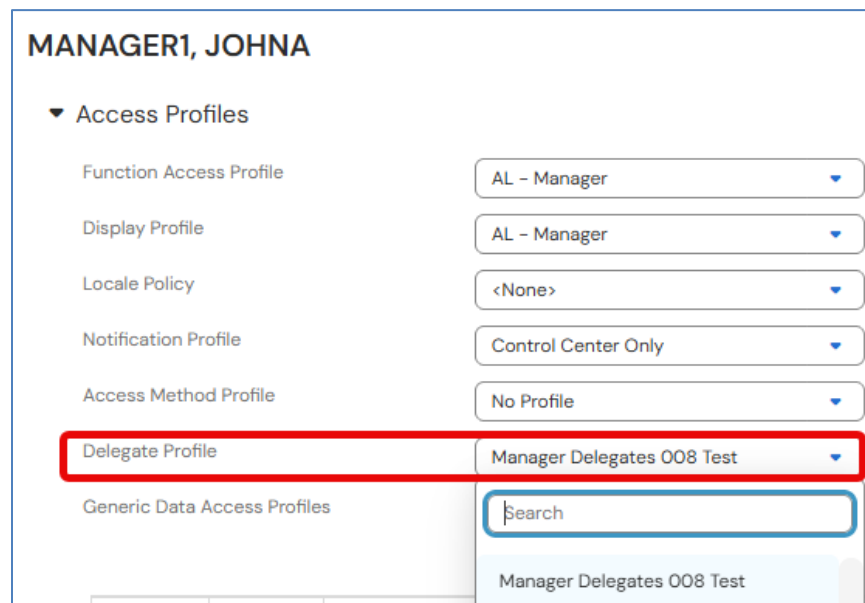
The Delegate profile must be added to each manager's People record.

1. From the **Home Page**, click the **Employee Search icon** .
2. The **Employee Search** panel displays. Enter the last name or employee ID of the person to be designated as the Delegate Manager.
3. Click **Search** to display results.
4. **Check the box** next to the name of the person to be designated as the Delegate Manager.
5. Click **Go To** and select **People**.

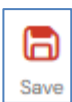


The screenshot shows the 'Employee Search' panel. At the top, there's a search bar with the placeholder 'Search by Employee Name or ID' and a 'Search' button. Below the search bar, there's a 'Show Search' section with 'Results for "manager"'. A table of results is shown with columns 'Name', 'Man ID', and 'TO2'. The first row is selected, and a 'Go To' button is visible. A dropdown menu is open from the 'Go To' button, showing options: 'Timecard', 'Schedule', 'People' (highlighted), 'Leave of absence case editor', and 'Reports'.

6. The **People Information** page displays. Under the **Employee** section, select **Access Profiles**.
7. Click the **drop-down** or use the **search field** to assign a **Delegate Profile**.



The screenshot shows the 'MANAGER1, JOHNA' page. Under the 'Access Profiles' section, there are several dropdown menus: 'Function Access Profile' (AL - Manager), 'Display Profile' (AL - Manager), 'Locale Policy' (<None>), 'Notification Profile' (Control Center Only), and 'Access Method Profile' (No Profile). The 'Delegate Profile' dropdown is highlighted with a red box, and its menu is open, showing 'Manager Delegates 008 Test' as the selected option. Below this, there's a 'Generic Data Access Profiles' section with a search bar and a list of results including 'Manager Delegates 008 Test'.

8. Click **Save** .

9. Repeat the process for each manager.

The managers now access the **My Business Process** tile to perform the **Delegation** feature when needed. Refer to the **Manager Delegation** job aid for assistance.

If a manager needs to be removed from the delegate group, change the **Delegate Profile** in their People Record to reflect **Empty Profile**. Next, on the **Delegate Profiles Editor** screen, highlight the manager and move their name to the **Available Delegates** window using the left facing arrow.

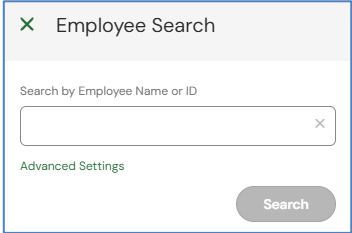
Delegate Profile Setup for Agency Administrators

Set an Employee as a Delegate Manager

Before an employee can be set up as a delegate manager, they must have the manager license added to their profile.

Note: This will require overnight processing to complete.

1. From the **Home Page**, click the **Employee Search** icon .
2. The **Employee Search** panel displays. Enter the last name or employee ID.
3. Click **Search** to display results.
4. **Check the box** next to the name of the employee.
5. Click **Go To** and select **People**.

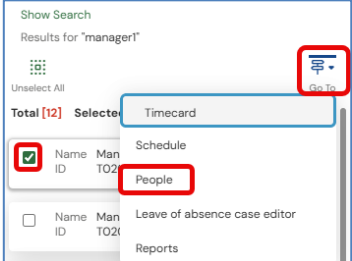


Employee Search

Search by Employee Name or ID

Advanced Settings

Search



Show Search

Results for "manager1"

Unselect All

Total [12] Selected

	Name	Man
	ID	TO2
☒		
☐		

Timecard

Schedule

People

Leave of absence case editor

Reports

6. The **People Information** page displays. Under the **Employee** section, select **Additional Information** and scroll down to **Delegate Manager**.



Employee

- Information
- Contacts
- Additional Information**

Additional Information	
Pay Rule Eff Date MM-DD-YY	
HRM Info	
Delegate Manager - Y or N	Y

7. Enter **Y** in the second column.
8. Click **Save**.

After the interface runs at night, the manager license will be assigned to their account. The manager license allows the admin to locate the employee while in **Time Setup>Common Setup>Delegate Profiles**. Only employees with a manager license display. Once the license has been added, complete step 1 in the Delegate Profile Setup section above to add the employee to the delegate manager group.

Note: If a new group or a new manager was created, complete step 2 to add to the manager's profile.