



State of Wisconsin Department of Administration

Manage Delegations Job Aid

Version 1.3

Version History

Version	Date	Editor	Description
1.0	10/01/19	Matt Olsen	Initial release
1.1	01/28/22	Matt Olsen	PUM and post-PUM updates
1.2	03/11/22	Matt Olsen	Process and add delegation section updates
1.3	09/04/24	Matt Olsen	Add delegation section updates

Role: Agency Time & Labor Specialist

PROCESS

Delegation allows a supervisor to assign their direct reports to someone else in the organization to approve timesheets and enter/review absences on their behalf. Delegation can be established for a duration not to exceed one year.

Agency Payroll staff may enter delegations on behalf of a supervisor if the supervisor cannot in the following scenarios:

- Supervisor is on a vacation.
- Supervisor is out of the office during approval deadlines.
- Supervisor cannot locate the desired delegate from the pre-populated list.

Agency Payroll staff should not enter a delegation in the following scenarios because transactions will automatically route upward to the approver for that supervisor:

- Supervisor is on a leave of absence.
- Supervisor's position is vacant.

Agency Payroll staff should not enter a delegation for a supervisor who is using accrued leave prior to termination. The **Reports to Position Number** for the supervisor's staff should be updated to the person who will be approving on their behalf.

TERMINOLOGY

Delegator

The supervisor who is delegating their Time & Labor and/or Absence transactions to another employee.



Delegate or Proxy

The employee to whom Time & Labor and/or Absence transactions are being delegated.

User ID

The 7–11 character ID associated with an employee. This is also known as the User Profile and IAM.

ADD DELEGATION REQUESTS

1. Navigate to **Add Delegation Request** page:
 - a. **Navigation:** Workforce Administrator Homepage > Payroll Dashboard > Time & Labor Tile > Approvals Folder > Add Delegation Request.
 - b. Enter or paste **User ID** of the delegator in all capital letters. If **User ID** is not known:
 - i. Click  to bring up a list of available employees, click  next to **Search Criteria** and enter one or more search criteria, then click **Search**.
 - User ID: 7-11 character ID associated with the employee.

- Description: Employee last name, first name (*Smith, John*).
- Empl ID: 9-digit ID associated with the employee's record.
- Email ID: Employee's business email address.

▼ Search Criteria

User ID
(begins with)

Description
(begins with)

Empl ID
(begins with)

Email ID
(begins with)

Search

Clear

▼ Search Results

ii. Click anywhere on the corresponding row for the delegator being selected.

▼ Search Results

1 row

User ID ▾	Description ▾	Empl ID ▾	Email ID ▾
			@wisconsin.gov

iii. Alternatively, you may run WI_SEC_USER_BY_EMPLID to view User ID associated with delegator's Empl ID and copy into this box.

c. Click on **Create Delegation Request**.

User ID

ABCDEZYXWV

Q

Create Delegation Request

2. **Start Date** defaults to today's date. If delegation is prospective, select or enter a future date.
3. Enter **End Date** greater than or equal to **Start Date**, and click **Next**.

Next >

*Start Date

10/24/2021

10/24/2021

*End Date

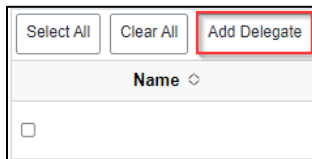
11/06/2021

11/06/2021

Comment

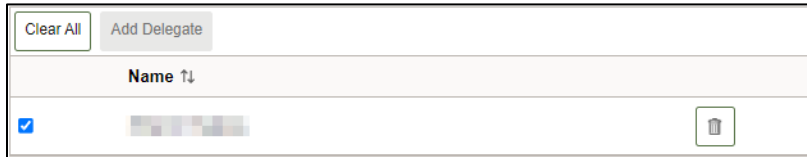
NOTE: The **End Date** is a required field and must be no later than one year past the **Start Date**. The system will not allow a delegation with a duration greater than one year.

4. Click **Add Delegate**.



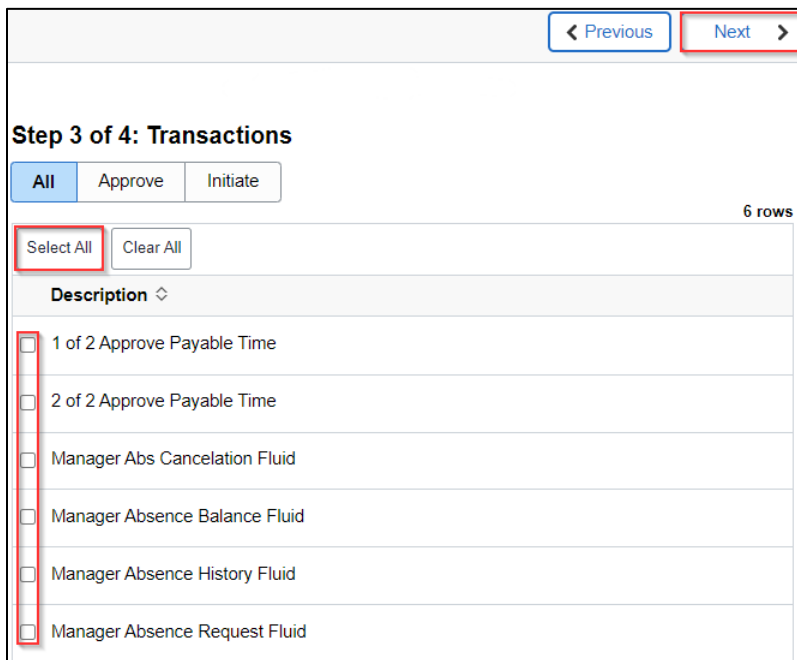
A screenshot of a user interface showing three buttons: 'Select All', 'Clear All', and 'Add Delegate'. The 'Add Delegate' button is highlighted with a red rectangular box. Below the buttons is a search field labeled 'Name' with a dropdown arrow and a checkbox.

5. Repeat [Step 1\(b\)](#) to search for the delegate by User ID, Empl ID, name or email address. You may only select one delegate so this field will be greyed out after this step.



A screenshot of a user interface showing a search bar with 'Clear All' and 'Add Delegate' buttons. Below the search bar is a table with a header 'Name' and a dropdown arrow. The first row of the table has a checkbox checked, a blurred name, and a trash icon.

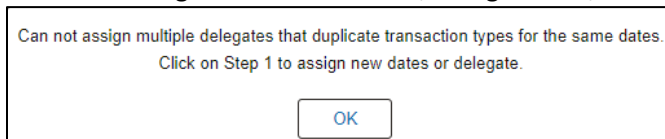
6. Click the checkbox next to each transaction being selected or click **Select All** if all transactions are being delegated to a delegate, then click **Next**.



A screenshot of a user interface titled 'Step 3 of 4: Transactions'. It features navigation buttons '< Previous' and 'Next >'. Below the title are buttons 'All', 'Approve', and 'Initiate'. A table with 6 rows is shown, with a 'Select All' button highlighted in red. The table has a header 'Description' and a list of transactions: '1 of 2 Approve Payable Time', '2 of 2 Approve Payable Time', 'Manager Abs Cancellation Fluid', 'Manager Absence Balance Fluid', 'Manager Absence History Fluid', and 'Manager Absence Request Fluid'. Each transaction has a checkbox next to it, which is also highlighted in red.

NOTE: Best practice is to delegate all transactions, but if selecting specific rows, make sure to check both **Approve Payable Time** transactions to reroute payable time correctly.

7. If any of the transactions selected have already been assigned, then you will receive the error message below. The dates, delegate and/or transaction must be corrected to proceed.



A screenshot of an error message dialog box. The text inside reads: 'Can not assign multiple delegates that duplicate transaction types for the same dates. Click on Step 1 to assign new dates or delegate.' Below the text is an 'OK' button.

8. Review **Delegation Details** for accuracy then click **Submit** to finalize the delegation.

The screenshot shows a web form titled "Step 4 of 4: Review and Submit". At the top right are two buttons: "< Previous" and "Submit". Below the title is a section labeled "Delegation Details" with a redacted area. The details include: Start Date (10/24/2021), End Date (11/06/2021), Comment (redacted), Delegates (redacted), and Transactions (1 of 2 Approve Payable Time, 2 of 2 Approve Payable Time, Manager Abs Cancellation Fluid, Manager Absence Balance Fluid, Manager Absence History Fluid, Manager Absence Request Fluid).

IMPORTANT: The delegate will receive an automated email with a link to accept the delegation. This step is required to make the delegation active. Timesheets may need to be resubmitted or nightly Time Administration processed to reroute existing payable time to the delegate.

ADMINISTER DELEGATION REQUESTS

1. Navigate to **Administer Delegation** page:
 - a. **Navigation:** Workforce Administrator Homepage > Payroll Dashboard > Time & Labor Tile > Approvals Folder > Administer Delegation.
2. Enter one or more of the following search criteria (all must be exact matches):
 - a. **Start Date** and **End Date:** Specify date range of delegation.
 - b. **Transaction Name:** Select a transaction name from the dropdown.
 - c. **Request Status:** Select status of requests from the dropdown.
 - d. **Delegation Status:** Select status of delegations from the dropdown.
 - e. **Proxy Emplid:** Enter Empl ID of delegate.
 - f. **Delegator Emplid:** Enter Empl ID of delegator.

The screenshot shows the "Administer Delegation" form. At the top are two buttons: "Maintain Delegated Authorities" and "Add Delegation Request". Below is a section labeled "Selection Criteria" with the following fields: Start Date (with a red 'a' and a calendar icon), End Date (with a red 'a' and a calendar icon), Transaction Name (with a red 'b' and a dropdown arrow), Request Status (with a red 'c' and a dropdown arrow), Delegation Status (with a red 'd' and a dropdown arrow), Proxy Emplid (with a red 'e'), and Delegator Emplid (with a red 'f').

- Once search criteria are entered, click **Search**.

Search	Clear
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Review Delegation Request(s)

- Under the search results **Delegation Request** tab, transactions names are listed in the **Description** column. The next columns show delegation and delegate User IDs and names.

Search Results

Delegation Request Request Details ||>

	Description	Delegator	Delegator	Proxy	Delegate
<input type="checkbox"/>	2 of 2 Approve Payable Time				
<input type="checkbox"/>	1 of 2 Approve Payable Time				
<input type="checkbox"/>	2 of 2 Approve Payable Time				

- Click on the **Request Details** tab to view **Start Date**, **End Date**, **Request Status** and **Delegation Status**.

Search Results

Delegation Request Request Details ||>

	Start Date	End Date	Request Status	Delegation Status	Notify Delegator
<input type="checkbox"/>	09/11/2021	09/17/2021	Ended	Inactive	<input type="checkbox"/>
<input type="checkbox"/>	09/11/2021	09/17/2021	Ended	Inactive	<input type="checkbox"/>
<input type="checkbox"/>	10/18/2021	10/23/2021	Submitted	Inactive	<input type="checkbox"/>

Revoke Delegation Request(s)

- From the search results, select the checkbox next to each request to be revoked. When the appropriate delegation requests are selected, click **Revoke**.

	Start Date ▾	End Date	Request Status
<input type="checkbox"/>	10/18/2021	10/23/2021	Submitted
<input type="checkbox"/>	10/18/2021	10/23/2021	Submitted
<input type="checkbox"/>	09/11/2021	09/17/2021	Ended

NOTE: The system will send a notification to the delegate affected by the change and automatically reassign all pending transactions back to the delegator.

ADDITIONAL RESOURCES

Transactions:

Transaction	Transaction Description
Approve Payable Time (1 and 2)	Reroutes payable time to delegate for approval (always select both rows).
Manager Abs Cancellation Fluid	Allows delegate to cancel absences for delegated staff.
Manager Absence Balance Fluid	Allows delegate to view absence balances for delegated staff.
Manager Absence History Fluid	Allows delegate to view history of absence requests for delegated staff.
Manager Absence Request Fluid	Allows delegate to enter absence requests for delegated staff.

Request and Delegation Statuses:

Request Status	Delegation Status	Description
Submitted	Inactive	When a delegator creates a new delegation request the system sets the request status to Submitted and delegation status to Inactive.
Accepted	Active	When a delegate accepts a delegation request, the system sets the request status to Accepted. The delegation status becomes Active only when the following two conditions occur: 1. The delegate accepts the delegation request. 2. The system date is greater than or equal to the Start Date and less than or equal to the End Date of the delegation period.
Accepted	Inactive	If the delegate accepts the delegation request but the delegation request is future dated, the delegation status remains <i>Inactive</i> until the system date is greater than or equal to the Start Date.
Rejected	Inactive	When a delegate rejects a delegation request, the system sets the request status to <i>Rejected</i> . The delegation status remains <i>Inactive</i> .
Ended	Inactive	When the delegation authority period for the delegate expires, the system sets the request status to <i>Ended</i> and changes the delegation status to <i>Inactive</i> . This change occurs when the system date is greater than the End Date of the delegation authority period.
Revoked	Inactive	When the delegator revokes a delegation request or the delegation administrator revokes the delegation request on behalf of the delegator, the system sets the request status to <i>Revoked</i> and changes the delegation status to <i>Inactive</i> . <i>The system reassigns all pending transactions from the delegate to the delegator.</i>

Delegation Query:

To review delegations for active employees, you may run the query: WI_TL_DELEGATION. This query contains data for all delegations starting March 22, 2021, or later.

1. Navigate to **Query Viewer** page:
 - a. **Navigation:** NavBar > Reporting Tools > Query Viewer.
 - b. Enter *WI_TL_DELEGATION* into the **begins with** field.
 - c. Click **Search**.
 - d. Select the desired format for viewing the query.
 - e. Enter any desired prompts.
 - f. Click **View Results**.