Delegation in myURHR

The delegation process in myURHR allows users to temporarily assign their tasks and responsibilities to another user, typically during periods when they are unavailable. Delegation ensures that critical business processes continue without delay, as the delegated user can perform actions on behalf of the original user. Please continue reading for more overall Guidelines.

Accountability in Delegation	Delegating a task does not absolve the person delegating the task of their responsibilities. They are still accountable for the delegate's actions.
Training	Users who have had initiating or approval tasks delegated to them are responsible for completing necessary training and familiarizing themselves with reference materials. They should also have bandwidth to provide the level of support being asked.
Separate Delegation	It is strongly recommended that individual tasks/events be thoughtfully considered for separate delegations rather than delegating all tasks/events to the same user.
Validation Rules for Delegation	• Delegation between UR and Affiliate entities is not permitted. (including: between UR/URMC and a UR Medicine Affiliate, or between different UR Medicine Affiliates) • Delegation length cannot exceed 365 days.
Who Can Be a Delegate	• **Peers** – anyone that reports to the same manager. • **Superiors** – your manager or anyone higher up in the chain. • **Subordinates** – anyone who reports to you or your peers. • **Others** – anyone in the company hierarchy.
No Approval Needed	The Delegation Request will **not route for approval** if the designated delegate is the user's Superior, Peer, or Subordinate (including the user's Peers' Subordinates).
Approval Needed	The Delegation Request will **route for approval** if the designated delegate is **not** the user's Superior, Peer, or Subordinate (including the user's Peers' Subordinates). The Delegation Request routes to the user's Manager for approval.

myURHR

Delegation in myURHR

Set up Delegation

1. To view current delegations, or create new ones, search **My Delegations** in the search box.
2. Select the **My Delegations** report.
3. Select the **Manage Delegations** button.
4. Enter the date range for the delegation.

Note: Remember that Delegations cannot exceed 365 days.

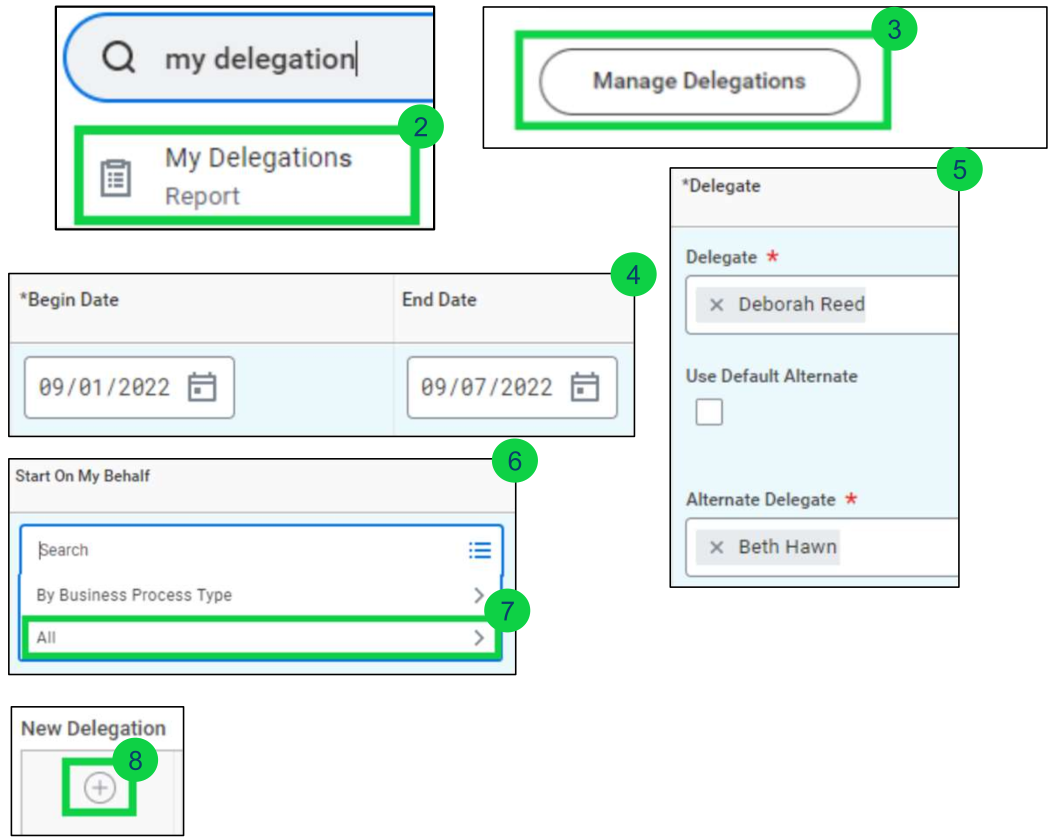
5. Select the Delegate:
   - **Delegate:** This is the specific employee you are delegating your task to.
   - **Alternate Delegate:** This role is only needed if the person you have delegated to has been restricted from viewing a process based on their existing security (i.e., approving a transaction they initiated).
   - Use **Default Alternate:** This box is automatically checked. If delegating to a subordinate, uncheck and select an alternate approver.

Identify Transaction Types:

6. In the **Start on my behalf** column, indicate which tasks your delegate should have permission to initiate.
7. Either enter in the name of the transaction or use the filtering options to select the appropriate tasks from the drop-down.

Note: select only those tasks that require delegation.

8. Select the **Plus (+)** sign under new delegation to create delegations for a new user.



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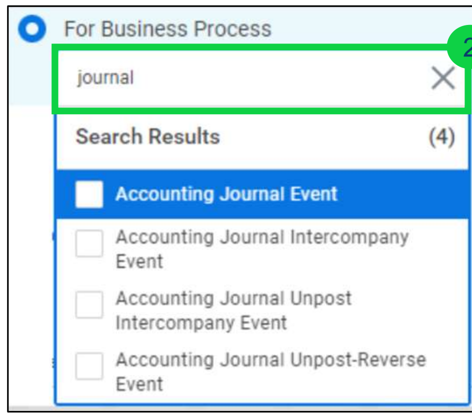
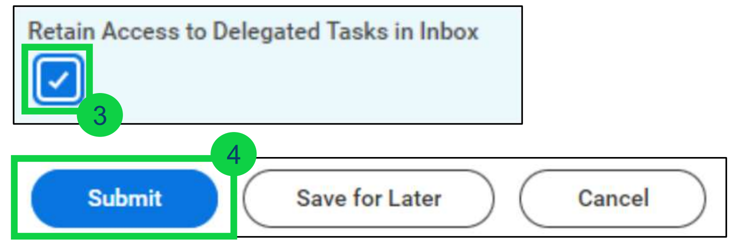
Do My Tasks on my behalf

1. To delegate tasks that arrive in your inbox to another user, you will populate this section.
2. Select the processes needing delegation in the search field. It is strongly recommended **not** to select **For All Business Processes.**
3. By delegating your inbox tasks, this will shift those tasks to the delegates inbox. To maintain notification and access to those tasks as well, select **Retain Access to Delegated Tasks in Inbox.**
4. Once all delegates and tasks have been entered, select **Submit** to submit the delegation request.





Email Notification	The delegate will receive an email notification informing them of who has delegated, the duration, and the tasks that been delegated to them. As the initiator of the request, both you and the alternate delegate will receive a notification when delegations go into effect.
Start Date	Even if the delegation request is approved before the start date, delegation cannot begin until the date noted in the initial request.
New Transactions	Delegates for My Tasks will only receive new tasks. Any already initiated will flow to the original approver.
Process History	For the duration of delegation, all tasks will be recorded in the Process History tab with the name of the delegate, and the words **on behalf of,** followed by the name of the delegator.
End a Delegation	To end a delegation early, you can navigate back to the **My Delegates report**, **Manage Delegates**, and select the **minus** icon next to the delegation you want to end.

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Actions as a Delegate

View Delegation Assignments	As a delegate, you can leverage the **View My Delegation Assignments** report to see all business process initiation steps which others have delegated to you.
Switch Accounts	Once you are identified as a delegate, there will be a **Switch Accounts** option displayed in both your profile under your Photo, as well as in your **My Tasks** box. If you have been delegated tasks from multiple users, you will be able to select the user who you want to act on behalf of at that time.
Delegation Dashboard	Once you have switched accounts, you will have access to the Delegation Dashboard, which includes the Delegated Actions application. From there, you can take initiating actions on any business process that has been assigned to you.
My Tasks (Inbox)	Once you have switched accounts, the **My Tasks** inbox will only show those transactions requiring approval or review that were delegated to you by the original user. These items will also show in your main **My Tasks** inbox with **On Behalf Of** next to the task title.