

MyView Delegation Guidance

A manager can create a delegation in MyView that allows them to assign MyView responsibilities and authorisations to another employee, typically during a period of absence.

When setting up a delegation, it's always important to carefully consider to whom responsibility is delegated to as they could have access to sensitive information, and depending on the type of delegation you create, they could have visibility to their peers personal information. Before setting up a MyView delegation you should check with your selected delegate that they are happy to accept the responsibility.

How to create a new delegation

- Click on **Delegation and Responsibilities** from the left-hand menu.

The screenshot shows the MyView dashboard for Theresa, a CDS HR Officer. The dashboard is titled 'Welcome Theresa' and includes an 'Edit dashboard' button. The main content area is divided into four sections: 'Leave Management', 'Authorisation', 'Pay Documents', and 'In Progress'. The 'Leave Management' section shows 'Flexi Leave' with -41 hours available and 'Annual Leave' with 265.19 hours available. The 'Authorisation' section shows 4 Absence and 1 Expense Claims, with a 'Submit' button. The 'Pay Documents' section shows 'Payslips' for 31 Mar, 28 Feb, and 31 Jan, and 'P60' for 2020, 2019, and 2018. The 'In Progress' section shows 1 Employee Changes, 5 Expense Claims, and 2 MyForms. The left-hand menu is visible, with 'Delegation & Responsibilities' highlighted in red.

- To create a new delegation rule, click **View Delegation Rules**.

The screenshot shows the 'Delegation and Responsibilities' page. The page title is 'Delegation and Responsibilities' and the subtitle is 'Welcome to the new MyView Delegation and Responsibility module. Guidance is available on how to use this module b'. The main content area is divided into two sections: 'Manage Delegation Rules' and 'Delegated to me'. The 'Manage Delegation Rules' section has a subtitle 'Create, edit and view delegation rules that you can assign to people in your organisation' and a 'View Delegation Rules' button highlighted in red. The 'Delegated to me' section has a subtitle 'Act on behalf of employees that have been delegated to you'.

- Click **Add New**

Delegation of Responsibility/Authority

Delegation Guidance

You should use this part of MyView to delegate responsibility or authorisation rights to another member of staff, eg during periods of annual leave. Currently you can delegate the following for MyView:

Authorisation - You can delegate authorisations for:

Car Mileage/Travel Expenses Claims - these can only be approved by an Authorised Signatory as per the Council's Authorised Signatory list, so you should ensure when delegating this task that you delegate to someone who has this level of approval

MyView Leave - authorisations for Annual, Flexi and other leave types

Questionnaires/e-forms - authorisation of Sickness Self Certificates

Responsibilities - the following responsibilities can be delegated in MyView. This means that rather than access this area of the system and do the task yourself, you can get someone to do it for you:

Development Discussions / ERD & SSSC Reg - date entry for completed Development Discussions / ERD's & SSSC Registration dates

MyView Leave Sickness Input - to input sickness for a member of your team

Delegation

Add New

The Delegation set up form will appear ready for completion:

New Rule

Rule Type * Authorisation Responsibilities

Description *

Delegate To * **Search**

Delegate For * **Select**

Module/Process Group/View * **Select**

- **Delegation Rule Type** – select **Authorisation** or **Responsibility** as appropriate. Managers can create an **Authorisation** delegation to enable another employee to approve or reject MyView forms i.e. annual leave requests, or a **Responsibility** delegation to enable another employee to action an assigned task i.e. input a sickness/absence
- **Description** - enter a description for the delegation e.g. Holiday Cover, Mileage Authorisation
- **Delegate To** – click **Search** to select the employee to whom the delegation is being made. **Please take extra care when selecting an employee to ensure it is the correct member of staff. You can check the location of the employee to verify you've selected the correct delegate**

AdvancedSearch

Surname:

First Name:

Known As:

Previous Surname:

Employee Number:

Direct Reports Only:

Select:	Name:	Employee Number:	Location:
<input checked="" type="radio"/>	McPhee, Bobby	BM1234	Pullar House

Please make your selection from the search results to [Continue], or amend the search criteria and perform a new [Search]

- **Delegate For** – click **Select** to pick the employee(s) the delegate will have access rights to. You can give access to the delegate to manage tasks for an individual in your team, your direct reports only, or your whole team. Click **Continue** once the appropriate selection has been made.

Select Option People Individually Direct Reports Whole Team

Employee Name	Employee Number	Post	Employee Information
Terry Rayburn	TRTEST	PKC Manager (0000008400)	
<input type="checkbox"/> Bobby McPhee	BM1234	CDS HR Assistant (0000008401)	
<input type="checkbox"/> Elliot Brown	EB1234	CDS HR Assistant (0000008402)	

- **Module/Process Group/View**– click **Select** and choose the MyView modules to be delegated. The information requested for this section of the form, are different depending on whether an **Authority** or **Responsibility** delegation has been selected as shown below.

Authorisation Delegation

- **Car Mileage/Travel Expenses** - managers must ensure that the delegate they select is on the Council's Authorised Signatory List.
- **MyView Leave** - for authorising all types of leave requests submitted by their employees.
- **Questionnaires / E-Forms** – please note, you can't select which MyView form(s) the delegate should have access to therefore the delegate will have access to all current forms available on MyView i.e Sickness Self Certs, Performance & Development Discussions, Secondment requests, Other Work requests and Conflict of Interest forms.

Select the Modules and Process Groups that you wish to delegate.

- Car Mileage & Travel Expenses Claims
- Leave Management
- MyTeam Leavers
- MyView Leave
- Personal Details
- Questionnaires/ e-forms
- Record Development Discussion / ERD Date

- Click in the box for the required task(s) and a tick will appear. Once the relevant selections have been made, click **Continue**.

Responsibility Delegation

- **MyTeam Leavers** – allows the delegate to submit termination information for an employee leaving the Council or moving to another post within the Council.

- **MyView Leave** (Sickness / Absence Input) – enables the delegate to input sickness absence on behalf of the manager.

Select the Modules, Process Groups and Views that you wish to delegate.

<input type="checkbox"/> Car Mileage & Travel Expenses Claims	<input type="text" value="View Only"/>
<input type="checkbox"/> Leave Management	<input type="text" value="View Only"/>
<input checked="" type="checkbox"/> MyTeam Leavers	<input type="text" value="Save & Submit"/>
<input checked="" type="checkbox"/> MyView Leave	<input type="text" value="View Only"/>
<input type="checkbox"/> Questionnaires/ e-forms	<input type="text" value="View Only"/>

- Click in the box for the required task(s) and select the level of permission for the delegate from the drop-down box. Once finished, click **Continue** to return to the delegation form for completion.

Delegation Period

From Date

To Date

Absence

Suppress Email And Authorisation

- **From date** – enter a date you would like the delegation to start.
- **To date** – enter the end date of the delegation rule or leave blank if the delegation is to run continuously.
- **Absence** – tick this box if you would like the exact same delegation rule (to the same employee, for the same members of staff and for the same tasks) **every time** you are on leave submitted via MyView Leave, and leave the end date blank.
- **Suppress Authorisation & Emails** - Clicking this box will ensure you do not receive e-mails about modules that have been delegated during their absence. The emails will go to the Delegate only.
- Click **Submit** once the Delegation set up form is fully completed, and a confirmation message will appear on screen.

Please note if a manager is absent unexpectedly and has not been able to set up a delegation in advance, their manager can email hrrsystems@pkc.gov.uk to request delegation(s) to be set up.

How to edit or delete an existing delegation

- To edit or delete a delegation request, click on **View Delegation Rules** as shown on page 1.
- Click on the link under **Description** as shown below and the original delegation set up form will open.

Delegation					
Type	Delegated to	From	To	Absence	Description
A	Bobby McPhee	01/06/2023	14/06/2023	N	Holiday cover June 2023

- Once the form has opened, click **Edit** and the form will unlock fields so you can make the required changes.

Delegation Period

From

To

Absence

Suppress Email And Authorisation

- Once the form has been edited, click **Submit**, or if the delegation is no longer required, click **Delete**.

Delegation Period

From

To

Absence

Suppress Email And Authorisation

