9.1 e-Performance

Delegation for Reviewing Managers



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Assigning Delegation Approval Authority

Document delegation allows the reviewing manager to delegate the approval process to another manager within the agency.



Step 1: Log into the Route 88 URL <u>https://route88.state.ga.us</u>

Logging in on this screen will take you directly to the Main Menu screen for PeopleSoft HCM.

Step 2: Click on Self Service

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Step 3: Click Create Delegation Request



Step 4: Enter the From Date and To Date: (this is the period for which the delegation is active) and click on "Next"

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Self Service	Fille Bills		
D Time Reporting D Receipted Information	Enter Dates		
Payroll and Compensation			
D Benefits			
D Performance Management	MG2: Systems Development & Supt		
- Leave Balance	Enter the dates for your delegation request. Enter a From Date that is today or later. Enter a To Date th	at	
- Manage Delegation	is the same as or later than your From Date. For open-ended delegation requests, leave the To Date		
D Manager Self Service	biank.		
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Note: The "From Date" automatically defaults to the current date, but can be changed. The "To Date" may be left blank for open-ended delegation requests.

Step 5: Select Approve Performance Document and click on "Next"

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Self Service Time Reporting Personal Information	Select Transactions	_	
Payroll and Compensation Benefits Learning and Development Performance Management	MG2: Systems Development & Supt		
- Leave Balance - Personal Leave Election - Manage Delegation D Manager Self Service	Select the transactions that you want to delegate to a proxy. You can select one or many transactions		
D Workforce Administration D Time and Labor D Global Payroll & Absence Momt	Delegate Transactions Transaction		
D Workforce Development D Organizational Development D Set Up HRMS	Approve Performance Document		
D Enterprise Components D Worklist D Reporting Tools - Change My Password	Select All Deselect All Previous Rem Next Cancel		
- <u>My Personalizations</u> - <u>My System Profile</u> - <u>My Dictionary</u>	THEN CURTER		
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Note: A check mark will appear in the Approve Performance Document box once you have made the selection.

Step 6: Select the employee that you are	delegating your	approval auth	hority to and	click on
"Next"				

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- My System Profile - My Dictionary	c		Employee	PS: Hum Res Specialist (WL)	Workforce Services - JI&M	
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Note: A mark will appear in after the employee(s) have been selected.

Reviewing managers can select an individual outside their hierarchy to delegate approval authority to by clicking "Search by Name".

Create Delegation Request					
Select Proxy b	oy Nam	е			
Will Maykit					
MG2: Systems Develpr	nent & Sup	t			
Search for a proxy using your proxy.	g their nam	e. You can also	o select the Sear	ch By Hierarchy hyperlink to se	arch for
Search by Hierarchy					
Last Name:					
First Name:					
Search	Clear	r			
Choose Delegate					
Name		Empl ID	Org Relation	Job Title	Departm
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Enter the last name and first name of the person to whom you wish to delegate authority, or click the hourglass next to the name field to select from available names, and click "Search". Select the desired employee and click "Next".

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() ()	Create Delegation Request		
Self Service Self Service Time Reporting Personal Information Payroll and Compensation Benefits Learning and Development	Delegation Detail	-	
 Performance Management Leave Balance Personal Leave Election Manage Delegation 	Select the Notify Delegator checkbox to receive all the notifications that your proxy receives when actir on your behalf.	9	
D Manager Self Service D Workforce Administration	Proxy:		
Time and Labor Global Payroll & Absence	From Date: 08/31/2012		
Mgmt	To Date: 06/30/2013		
Organizational Development	Transactions		
D Enterprise Components	Approve Performance Document		
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- My System Profile	Submit		
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Step 7: Select the Notify Delegator box and click on "Submit"

Note: The selected employee(s) name will appear

Checking the "Notify Delegator" box before clicking on "Submit" will send the proxy an email to let them know of the delegation request.

Step 8: Click "OK"

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		G Interne	t	* 100% • /

Note: You will receive a message stating. "You have successfully submitted a delegation request. Refer to the My Proxies page to view the status of the report.

The person who will be the delegator of the manager's performance documents will receive an email notification and they will have to accept the request.

Accepting Delegation Approval

Step 9: The employee that is to become the proxy must then navigate to the same location and accept the delegation request.

Manage Delegation
Barry Cuda
Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.
Learn More about Delegation
Select Create Delegation Request to choose transactions to delegate and proxies to act on your behalf.
Create Delegation Request
Select Review My Proxies to review the list of transactions that you have delegated and the proxy for each transaction.
Review My Proxies
Select Review My Delegated Authorities to see the list of transactions that have been delegated to you by others, and to accept or reject pending delegation requests.
Review My Delegated Authorities

Step 10: The employee may then accept or reject the request by clicking on the appropriate button.

My	My Delegated Authorities							
Bar	ry Cuda							
Dep	uty Commissioner							
This show Show	This page allows you to view your delegated authorities. Select a particular status and select <i>Refresh</i> to show the matching requests. Select the information icon for request details. Show Requests by Status: Refresh							
Cho	ose Delegate							
	Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
	Approve Performance Document	Will Maykit	MG2: Systems Develpment & Supt	08/29/2011		Submitted	Inactive	0
Sele	Select All Deselect All Accept Reject							
Retu	irn to Manage Delegation							

Step 11: To view the people to whom you have delegated approval authority to, select "Review my Proxies"

Manage Delegation	
Barry Cuda	
Some of your self-service transactions can be delegated so that and/or approve transactions for you and/or your employees. In a responsibility for their transactions to you.	t others may act on your behalf to initiate addition, others may have delegated
	Learn More about Delegation
Select Create Delegation Request to choose transactions to del	legate and proxies to act on your behalf.
	Create Delegation Request
Select Review My Proxies to review the list of transactions that y	ou have delegated and the proxy for each
	Review My Proxies
Select Review My Delegated Authorities to see the list of transact others, and to accept or reject pending delegation requests.	ctions that have been delegated to you by
	Review My Delegated Authorities

Step 12: Select "Accepted" from the Show Request by Status drop-down



Note: This is the person who will be delegated to approve the reviewing manager's performance documents.

Step 13: System will display your accepted proxies

My Proxies MG2: Systems Development & Supt This page allows you to view your prosies and the request status for each delegation request. Select a particular status and select Aerien ho show the matching request. Select the information icon to view request them select Aerien ho show the matching request. Select the information icon to view request status: Accepted Revoke. Show Requests by Status: Accepted Revoke. Stext.tdl Desstect.tdl Resstect.tdl Resstect.tdl Revoke. Stext.tdl Desstect.tdl Resstect.tdl Revoke. Stext.tdl Desstect.tdl Desstect.	en I Sign
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MG2: Systems Development & Supt This page allows you to view your provies and the request status for each delegation request. Select a andrular status and select Relevants, select the request than select Revoke Show Requests by Status: Accepted Revoke Return to Manage Delegation	
This page allows you to view your provies and the request status for each delegation request. Select a particular status and select Alereot to show the matching requests. Belect the information icon to view expected status: Accepted Revolve.	
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stat.All Destinat.All Revolve	
return to Manage Delegation	
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Note: To approve documents that have been delegated to them, Proxy managers should follow the same approval steps as any Reviewing Manager. See the Approval Process – Reviewing Manager Job Aid for specific instructions.