Delegations Basics

Initiating a Delegation Request

Managers can delegate the initiation and approval of MSS employment actions to other GEMS users.

Starting from the Manager Self Service Homepage, click on the Create Delegation Request tile.

As you determine who you will grant delegation to, we encourage you to speak to your HR Liaison (Dept. HR) to determine if a business process has been put in place to identify who can serve as a Delegate within the Department/Unit.

Please Note: If a Manager (Dean, Chair, Director, etc.) assigns a Delegate, that Delegate will have access to initiate actions for all employees within their reporting tree.

On the Delegation Dates screen, update the following information:

Start Date: Enter the date the delegation will be effective.

End Date: If the delegation will only be in place for a set time period, enter an end date. Otherwise, leave it blank.

Comment: Must be supplied. Include information on reason for the delegation and it’s purpose. Please note that delegates assigned by Unit Approvers must be in line and listed on the salary delegation authority list.

Click Next.

Please Note: If no end date is entered, the delegation will remain in effect until it is revoked by the Manager or a Delegation Administrator.
On the **Delegates** screen, scroll the list for the employee(s) that you would like to initiate transactions on your behalf.

Select the Check Box to the left of their name.

If there are employees who are not listed, you can add them by clicking **Add Delegate**.

The **Add Delegate** window will appear. Click on the magnifying glass to open the **Lookup** window.

**Please Note**: GEMS will intuitively pull a list of employees from your department to list as a Delegate. You are not required to chose one of them. If you have been given direction from your HR Liaison (Dept. HR) on who can serve as a Delegate within the Department/Unit, please follow those guidelines.

Click on the arrow to the left of **Search Criteria** to search by Employee Name or ID.

Click **Search**.

Under the **Search Results**, click on the row containing the employee’s information.

When returned back to the **Add Delegate** window, click **Done**.

The employee will now appear at the bottom of the Delegates list with the checkbox selected.

Repeat the **Add Delegate** steps above if there are any additional employees you wish to be a delegate.

Click **Next**.

**Please Note**: You are able to assign multiple Delegates in one request.
On the Transactions screen, select the “Initiate” tab. This will list all of the transactions the delegates will be able to Initiate on your behalf.

Select the check box for each transaction you wish to delegate on your behalf.

Click Next.

Please Note:
If you are a Manager, please select all transactions listed in the “Initiate” tab.

If you are an HR Liaison or Unit Approver and wish to delegate your ‘approval’ authority, you will need to click the “Approve” tab and select the applicable transactions.

On the Review and Submit screen, review the Delegation Details.

If all of the information looks correct, click Submit.

Delegates will receive an email notification to Accept or Reject the delegation request.

Once the Delegate logs into GEMS they will be able to accept or reject the delegation request.

Original Message

From: 
Sent: Thursday, September 23, 2021 6:55 AM
To: 
Subject: A delegation request from has been submitted for review and acceptance

has submitted a delegation request to you.

Transaction(s): Add delegate

You can review the request, then accept or reject the request, please log into GEMS via https://my.udf.edu

This communication was sent via Oracle Workflow Technology. Please do not reply to this email.
Accepting/Rejecting a Delegation Request

Upon receiving the email notification, delegates can log into GEMS to Accept/Reject the delegation request.

Go to the Manager Self Service homepage. (If you do not have this home page see note below)

Click on the My Delegated Authorities tile.

Under the Submitted tab, delegates will see a listing of transactions that have been delegated to them as well as the time period.

Select the box next to the transaction and click Accept or Reject.

An email notification will be sent out to the Delegator denoting the acceptance or rejection of the delegation. Delegators can also see their active delegations on the My Delegates tile.

Please Note: If you do not currently have the Manager Self Service tab, click the notification flag located at the top right hand corner.

Within Actions, there will be a notification regarding the delegation request. Click this notification and the screen to accept the delegation request will open.
Revoking Delegated Authority

Managers can revoke delegated transactions at any time.

From the Manager Self Service homepage, click on the My Delegates tile.

Under the Active tab, select the checkbox next to the delegation you would like to revoke.

Click Revoke.

*Please Note:* If the original delegation request included multiple users and transactions, the removal of the delegated authority will apply to **ALL** users and transactions from that request.