

Delegate Authority

This job aid explains how you can delegate your access to another manager in your absence for timecard management.

About Manager Delegation

- When a manager or administrator expects to be unavailable — such as to take a vacation — that person can delegate authority to another manager or administrator — the delegate — to access and receive the absent person's notifications and complete tasks during the absence.
- Example: The delegate approves time-off requests while the regular manager is on vacation.
- When you delegate you can still manage the timecards yourself and the person you delegate to can also manage the timecards of your direct reports
- The person you delegate to will be able to:
 - Manage timecards for your direct reports. They will not see your timecard.
 - See the pay dollar totals on all the timecards they are managing. There is also a place on the People page where they could see a person's primary hourly/salary pay rate if they went looking for it.
- As of Go-Live for Troon we do not yet have all General Managers set up to see the entire club just their Direct Reports. Until this security change is made the GM's can have their direct reports delegate upwards to the GM so the GM can see and manage all timecards.

To delegate your access:

1. Click **Home**.
1. In the **My Notifications** tile, click **Tasks**. The Control Center will open.
2. In Control Center, click **My Actions**. Select **Business Processes > Manager Delegation**.
3. In **Delegate Profile**, select the person who will take authority during your absence.
4. Select the **Start Date** and **End Date** from the calendars. The dates are in the time zone of the requester.
5. Select your role in the **Role Profile** list.
6. Click **Submit**.

The screenshot shows a mobile application interface for 'Manager Delegation'. The form is titled 'Manager Delegation' and has a close button (X) in the top right corner. Below the title, there is a 'New Delegation' section. The 'Delegate*' field is a dropdown menu with 'Chugh, Aditi' selected. The 'Start Date*' field is a date picker with '9/12/2018' selected and a 'Clear' button. The 'End Date*' field is a date picker with '9/28/2018' selected and a 'Clear' button. The 'Role Profile*' field is a dropdown menu with 'Store Manager' selected. At the bottom of the form is a dark blue 'Submit' button. A hand cursor is pointing to the 'Submit' button. The background shows a navigation menu with 'Home', 'My Actions', and 'My Notifications'.

To cancel your delegation:

You can cancel a delegation after you submit it and before the delegate accepts it.

1. In the **My Notifications** tile, click **Tasks**. The Control Center will open.
2. Select the delegation process you wish to cancel.
3. Click **Cancel Delegation**.

To accept a delegate request:

1. In the **My Notifications** tile, click **Tasks**. The Control Center will open.
2. Select the delegation notification.
3. Check the details.
4. Select one of the following:
 - Accept
 - Reject
5. Optionally, enter a **Comment**.
6. Click **Submit**.
7. Log out and log in again to be able to switch roles.

Complete tasks for the other person

1. Below your name, photo, and **Edit Profile**, click **Switch Roles**. Select the name of the person whose authority you are taking.

Important: You cannot see the **Switch Roles** button if the start date is in the future.

2. Complete the tasks as needed on behalf of the other person.
3. To return to your own role, click **Switch Roles**. Select **Myself**.

