# Table of Contents

- Introduction .................................................................................................................. 3
- Learning Objectives ...................................................................................................... 3
- **I. Position Data Requests at DePaul University** .......................................................... 4
  - A. Introduction to Position Data Requests ................................................................... 4
  - B. Who is eligible to use the Manager Self Service Application? ................................. 4
  - C. Navigating to Position Data Requests in Manager Self Service ............................... 4
  - D. Position Data Requests in Manager Self Service ..................................................... 5
- **II. Request a Position Data Action in Manager Self Service** ....................................... 6
  - A. Types of Position Data Actions ............................................................................... 6
  - B. Components of the Request Position Data Form ..................................................... 7
    - Clone vs. Create from Scratch ................................................................................. 7
    - Effective Date ........................................................................................................... 8
    - Job Category ............................................................................................................ 8
    - Job Code ................................................................................................................... 8
    - Functional Title ....................................................................................................... 8
    - Department .............................................................................................................. 8
    - Compensation ......................................................................................................... 8
    - Reports To ............................................................................................................... 8
    - Save ......................................................................................................................... 9
    - Position Number ..................................................................................................... 10
    - Attachments ........................................................................................................... 10
    - Budget .................................................................................................................... 11-12
    - Distribution ............................................................................................................ 13-14
    - Other Attributes ..................................................................................................... 15
    - Comments .............................................................................................................. 15
    - Submit .................................................................................................................... 15
    - Editable Fields by Types of Position Data Actions .................................................... 16
  - C. Approval Path ......................................................................................................... 17
    - Viewing the Approval Path ..................................................................................... 17
    - Approvers .............................................................................................................. 17-18
    - Ad Hoc Approvers and Reviewers ......................................................................... 19
- **III. My Pending Approvals** .......................................................................................... 19
  - A. E-mail Notification of Pending Approvals ............................................................... 19
  - B. Alternative Navigation to Approve Position Data Requests ....................................... 20
  - C. Steps to Approve or Deny a Position Data Request ................................................ 21-22
- **IV. Position Approval Form** ....................................................................................... 23
  - A. Monitoring the Approval Path ................................................................................ 23-24
  - B. Pending Status ..................................................................................................... 25
  - C. Approved Status ................................................................................................... 25
  - D. Pushed Back Status ............................................................................................. 25
  - E. Denied Status ....................................................................................................... 25
- **V. Delegating Position Data Request** ........................................................................... 26
  - A. What is HR Delegation? ....................................................................................... 26
  - B. When is HR Delegation Used? ............................................................................. 26
  - C. Navigation to Manager HR Delegation in Manager Self Service ......................... 26-27
  - D. Create Delegation Request Page ...................................................................... 28
  - E. Select Transaction Page ......................................................................................... 29
  - F. Search for Proxy by Name .................................................................................... 30-32
  - G. Delegation Request E-mails ................................................................................. 33
  - H. Reviewing my Delegated Authorities ................................................................... 34-35
- **VI. Technical Support and Online Resources** ............................................................... 36
Introduction

Welcome to training for Position Data Requests. This Desk Reference accompanies instructor-led training and on-line job aids that provide DePaul employees with an overview of the new Position Data Requests application in PeopleSoft 9.0. It is designed to assist you with learning the necessary steps to complete Position Data Requests transactions and with locating additional resources to help you do your job.

Facilitators will be using this reference to support the demonstrations and scenarios used in today’s training. However, it is our hope that this booklet will serve as a helpful resource when you conduct transactions using Position Data Requests in Manager Self Service.

Learning Objectives

- Complete the necessary steps to initiate Position Data Requests in PeopleSoft 9.0
- Complete the necessary steps to approve a Position Data Request in PeopleSoft 9.0
- Delegate HR transactions to a proxy and/or accept proxy status
- Locate resources for troubleshooting
I. Position Data Requests at DePaul University

A. Introduction to Position Data Requests

Position Data Requests is a new online tool for submitting requests for new or modified positions in Campus Connection.

The Position Data Requests application replaces the paper Job Comparison Form and Workforce Modification Request Form (WMRF) by combining the request and approval process into one application. The enhanced process allows areas to add additional approvers or reviewers, complete a budget change form, add attachments, and view the status of position data requests online.

B. Who is eligible to initiate a Position Data Request in Manager Self Service?

Each department determines who will initiate Position Data Requests for their area. One person or several people may be designated to use the new online application, depending on the needs and preferences of the department. This is determined by the department administrative or academic officer. Typically it may be delegated to a budget manager.

In order to access the Position Data Requests application, department designated users must have the appropriate PeopleSoft security access. Current participants in the WMRF process will have access established beginning July 7, 2008. New users may obtain access through the PeopleSoft Access Request process.

C. Navigating to Position Data Requests in Manager Self Service

Sign on to Campus Connect.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>From the CAMPUS CONNECT HOMEPAGE, navigate to <strong>Manager Self Service</strong>.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>For Employees Link</strong>.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Manager Self Service Link</strong>.</td>
</tr>
<tr>
<td>4.</td>
<td><strong>Manager Self Service</strong> page appears. Click on the <strong>Position Data Requests</strong> link.</td>
</tr>
</tbody>
</table>
D. Position Data Requests in Manager Self Service

The **Position Data Requests** application is located on the **Manager Self Service** page in Campus Connection (Figure 1). There are three different tasks associated with Position Data Requests:

- **My Pending Approvals** allows you to review Position Data Requests awaiting your approval.
- **Position Approval Form** allows you to check the status of Position Data Requests you initiated or approved.
- **Request a Position Data Action** allows you to initiate a request to create a new position, modify an existing position, or submit and off-cycle pay change.
II. Request a Position Data Action

After navigating to the Request Position Data page, the first step to initiate a request is to determine the type of position data action you will be requesting.

A. Types of Position Data Actions

There are five different position data actions. Use the definitions in the table below to determine which action to choose.

<table>
<thead>
<tr>
<th>Position Data Action</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a New Position</td>
<td>Use to initiate a request for a position that does not already exist.</td>
</tr>
<tr>
<td>Major Revisions</td>
<td>Use to modify an existing position when the position attributes—such as duties and responsibilities—change significantly. Use only for full-time staff positions.</td>
</tr>
<tr>
<td>Minor Revisions</td>
<td>Use to modify an existing position for one or more of the following minor position attributes: functional title, department, and/or reports to change. Use to inactivate a position.</td>
</tr>
<tr>
<td>Off-Cycle Pay Change</td>
<td>Use to request a salary change outside of the annual review cycle. Use only for full-time staff positions.</td>
</tr>
<tr>
<td>Return to Work in Progress</td>
<td>Use to complete a request you began, but</td>
</tr>
</tbody>
</table>
B. Components of the Request Position Data Form

After selecting the appropriate type of position data action, you will complete the online Request Position Data form.

Figure 3. Request Position Data Form

1. **Clone Existing Position or Create from Scratch.** When creating a new position or making major revisions to an existing position, you have the option of cloning an existing position or creating the position from scratch.

   Select **Clone from Existing Position** when you are creating or modifying a position that will be identical to an existing position with the exception of the **Department** and **Reports To** attributes.

   Select **Create from Scratch** when you are creating or modifying a position that will be different from existing positions.
2. **Effective Date.** The Effective Date is the date the position is created. The field will automatically populate with the appropriate effective date. You may enter a different effective date for all transactions except for creating a new position with the job category of part-time staff, part-time faculty, student, and one-time pay.

3. **Job Category.** Job categories include full-time staff, full-time faculty, part-time staff, part-time faculty, students, and one-time pay. The job category you select determines which components of the online form are available for editing.

4. **Job Code.** Job codes correspond to the official Human Resources titles for positions. If the Job Category is full-time staff, leave the Job Code field blank; it will be populated by HR staff. All other job categories require a Job Code. See the tables below for frequently used job codes.

<table>
<thead>
<tr>
<th>Job Code</th>
<th>HR Title—Faculty Positions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1200</td>
<td>Professor</td>
</tr>
<tr>
<td>1220</td>
<td>Visiting Professor</td>
</tr>
<tr>
<td>1230</td>
<td>Adjunct Professor</td>
</tr>
<tr>
<td>1300</td>
<td>Associate Professor</td>
</tr>
<tr>
<td>1315</td>
<td>Clinical Associate Professor</td>
</tr>
<tr>
<td>1320</td>
<td>Visiting Associate Professor</td>
</tr>
<tr>
<td>1330</td>
<td>Adjunct Associate Professor</td>
</tr>
<tr>
<td>1400</td>
<td>Assistant Professor</td>
</tr>
<tr>
<td>1415</td>
<td>Clinical Assistant Professor</td>
</tr>
<tr>
<td>1420</td>
<td>Visiting Assistant Professor</td>
</tr>
<tr>
<td>1430</td>
<td>Adjunct Assistant Professor</td>
</tr>
<tr>
<td>1600</td>
<td>Lecturer</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Job Code</th>
<th>HR Title—Staff Positions</th>
</tr>
</thead>
<tbody>
<tr>
<td>3999</td>
<td>Part-Time Professional</td>
</tr>
<tr>
<td>4920</td>
<td>Part-Time Clerical</td>
</tr>
<tr>
<td>7100</td>
<td>Student</td>
</tr>
<tr>
<td>9050</td>
<td>One-Time Payment</td>
</tr>
</tbody>
</table>

5. **Functional Title.** The Functional Title is the job title the department will use for the position; it may be different from the HR title corresponding to the Job Code. The title may be up to 30 characters long.

6. **Department.** Department is the DeptID.

7. **Compensation.** HR Compensation will populate the Comp Rate and Frequency fields after evaluating the position request. Leave these fields blank.

8. **Reports To.** Reports To is the manager to whom the new or modified position will report. Enter either the person ID (Empl ID) or the Position Number of the manager; the remaining data will self-populate.

The Report To field is required for full-time staff and faculty. Part-time staff, part-time faculty, students, and one-time pay do not have assigned Reports To in PeopleSoft.
Figure 4. Saving the Request Position Data Form

9. **Save.** Before continuing with the Position Data Request Data Form, save your work (Figure 4). This will allow you to continue with the form or log out of Manager Self Service and complete the Position Data Request later. For instructions on how to return to your work, see the online resource **How to Return to a Work in Progress.**
10. **Position Number.** The first time you save your Position Data Request, the system will assign it a position number. The position number appears in the **Proposed Position Data** section of the form (Figure 5).

11. **Attachments.** Attach supporting documentation by uploading files to the Request Position Data form. Each type of position action type requires different supporting documentation. Use the table below to determine the necessary attachments for your Position Data Request.

<table>
<thead>
<tr>
<th>Data Action Request</th>
<th>Documentation Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a New Position</td>
<td>• Job Description</td>
</tr>
<tr>
<td></td>
<td>• Organizational Chart</td>
</tr>
<tr>
<td>Create a New Position at the level of Assistant or Associate Vice President or higher</td>
<td>• Job Description</td>
</tr>
<tr>
<td></td>
<td>• Organizational Chart</td>
</tr>
<tr>
<td></td>
<td>• Title Approval—a written approval letter or copy of email from the Executive Vice President of the area</td>
</tr>
<tr>
<td>Major Revision</td>
<td>• Job Description</td>
</tr>
<tr>
<td></td>
<td>• Organizational Chart</td>
</tr>
<tr>
<td>Minor Revision – Department Change</td>
<td>• Labor Cost Allocation Form</td>
</tr>
<tr>
<td>Off Cycle Pay Change</td>
<td>• Performance Appraisal</td>
</tr>
<tr>
<td></td>
<td>• Pay Exception Form</td>
</tr>
</tbody>
</table>
12. **Budget and Distribution.** In the **Budget and Distribution** section, select **Budget Change Required** if the new position needs additional funding (Salary and Benefits). If 100% of the funding exists then leave the **Budget Change Required** box unchecked.
The **Budget Change Request** page is an online alternative to the paper Budget Change form when it accompanies position data requests. The information you are required to provide in the online form is identical to the existing paper form.

13. **View Instructions.** This link takes you to the Budget Change Request Guidelines. Review the guidelines before completing the Budget Change request.

14. **Detailed Description.** Describe the situation that makes a budget change necessary.

15. **Choose a Budget Change Type.** Select transfer.

16. **Budget Change “From” & Budget Change “To” Tables.** Complete the tables following the Budget Change Request Guidelines. The **Lookup Icon** allows you to search for codes. The **(+) buttons** allow you to add rows to the tables, if needed.
17. In **Budget and Distribution**, select the **Add or Change Distribution** link (Figure 8). The information you provide in the Distribution section indicates from which accounts the position will be paid. Payroll Accounting will verify and approve the data.

Questions regarding distribution may be directed to the Financial Accounting office (See contact information in Section VI).
18. **View Distribution Across Fiscal Year.** This link allows you to view the current distribution (if available) across the fiscal year for the position. This does not indicate the new distribution information.

19. **Use DeptId.** Enter the DeptID for the department out of which the position will be paid. If split funded, use the DeptID that reflects the highest percentage of the distribution. If the distribution is split evenly, select a primary department.

20. **Required: Typical (Default) Distribution.** To complete the table, enter the appropriate chartfield data and the distribution percentage pertaining to the DeptID out of which the position is being paid. The **Lookup Icon** is available to search for codes. The (+) **buttons** allow you to add rows to the tables, if the position is split funded.
21. **Other Attributes.** The fields in Other Attributes, with the exceptions noted below, are not editable. HR Position Management will populate the Other Attributes fields after the initial review of the Position Data Request.

22. **Recruit for Position.** When the Recruit for Position box is checked, HR recruitment will automatically be notified to recruit for the position once it is approved. The Recruit for Position box will be checked and locked down for all new positions for full-time and part-time staff.

   **Employee Type.** When requesting student positions, select the Employee Type hourly.

23. **Comments.** Enter any comments that add to or clarify your request.

24. **Submit.** Click the submit button to submit the Position Data Request. To withdraw a request once it has been submitted, contact the HR Compensation Administrator.

   As soon as you click the Submit button, you will receive an email confirmation that the request was successfully submitted and has been routed to the first approver on the approval path.
Editable Fields by Types of Position Data Actions. The type of Position Data Request Action (Create a New Position, Major Revisions, Minor Revisions, Off-Cycle Pay change) determines which components of the online form are available for editing. The table below summarizes which fields must be completed for each type of Position Data Request.

<table>
<thead>
<tr>
<th>Position Data Action</th>
<th>Editable Fields By Requestor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a New Position by Cloning</td>
<td>Effective Date</td>
</tr>
<tr>
<td></td>
<td>Functional Title</td>
</tr>
<tr>
<td></td>
<td>Department</td>
</tr>
<tr>
<td></td>
<td>Reports to</td>
</tr>
<tr>
<td>Create a New Position From Scratch</td>
<td>Job Category</td>
</tr>
<tr>
<td></td>
<td>Effective Date</td>
</tr>
<tr>
<td></td>
<td>Job code</td>
</tr>
<tr>
<td></td>
<td>Functional Title</td>
</tr>
<tr>
<td></td>
<td>Department</td>
</tr>
<tr>
<td></td>
<td>Reports to</td>
</tr>
<tr>
<td></td>
<td>Replaces position number</td>
</tr>
<tr>
<td></td>
<td>Recruiting check box</td>
</tr>
<tr>
<td>Major Revision by Cloning</td>
<td>Job Category</td>
</tr>
<tr>
<td></td>
<td>Effective Date</td>
</tr>
<tr>
<td></td>
<td>Job code</td>
</tr>
<tr>
<td></td>
<td>Functional Title</td>
</tr>
<tr>
<td></td>
<td>Department</td>
</tr>
<tr>
<td></td>
<td>Reports to</td>
</tr>
<tr>
<td></td>
<td>Replaces position number</td>
</tr>
<tr>
<td></td>
<td>Recruiting check box</td>
</tr>
<tr>
<td>Major Revision from Scratch</td>
<td>Effective Date</td>
</tr>
<tr>
<td></td>
<td>Functional Title</td>
</tr>
<tr>
<td></td>
<td>Department</td>
</tr>
<tr>
<td></td>
<td>Reports to</td>
</tr>
<tr>
<td></td>
<td>Replaces position number</td>
</tr>
<tr>
<td></td>
<td>Recruiting check box</td>
</tr>
<tr>
<td>Minor Revision (Title Change)</td>
<td>Functional title</td>
</tr>
<tr>
<td></td>
<td>Effective Date</td>
</tr>
<tr>
<td>Minor Revision (Report To Change)</td>
<td>Reports to Position Number and Person ID</td>
</tr>
<tr>
<td></td>
<td>Effective Date</td>
</tr>
<tr>
<td>Minor Revision (Department Change)</td>
<td>Department</td>
</tr>
<tr>
<td></td>
<td>Effective Date</td>
</tr>
<tr>
<td>Minor Revision (Multiple Changes)</td>
<td>Functional Title</td>
</tr>
<tr>
<td></td>
<td>Reports to Position Number and Person ID</td>
</tr>
<tr>
<td></td>
<td>Department</td>
</tr>
<tr>
<td></td>
<td>Effective Date</td>
</tr>
<tr>
<td>Off Cycle Pay Change</td>
<td>Effective Date</td>
</tr>
<tr>
<td>Minor Revision Inactivation</td>
<td>Effective Date</td>
</tr>
</tbody>
</table>
C. Approval Path

Once you submit the Position Data Request, the system generates an approval path.

Figure 11. Approval Path – Status Monitor

Viewing the Approval Path
After you submit the Position Data Request, the application returns you to the Request Position Data form. The approval path is located at the bottom of the page in an area referred to as the Status Monitor (Figure 11).

Approvers
The Position Data Request Application generates an approval path based on the type of request (new position, major revision, minor revision, off-cycle pay change), the job category (FT staff, FT faculty, PT staff, PT faculty, student, one time pay), and the funding (grant or non-grant).

Depending on the specific type of request, the approval path will be made up of all or some of the following approvers:

- HR Position Management
- Department VP or Dean
- President, EVP, or Provost
- Restricted Funds Area (Gift Funded, OSPR, Restricted Accounting, Endowment Funded, Agency Account depending on DeptID)
- Payroll Accounting
- HR Position Management
Examples of Approval Paths:

Newly created, full-time staff, non-grant funded:

<table>
<thead>
<tr>
<th>Status: Pending</th>
<th>Pending</th>
<th>Not Routed</th>
<th>Not Routed</th>
<th>Not Routed</th>
<th>Not Routed</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Full-Time Staff Position</td>
<td>HR Position Management</td>
<td>Department VP or Dean</td>
<td>President, EVP or Provost</td>
<td>Payroll Accounting</td>
<td>HR Position Management</td>
</tr>
</tbody>
</table>

Newly created, full-time faculty, grant-funded:

<table>
<thead>
<tr>
<th>Status: Pending</th>
<th>Pending</th>
<th>Not Routed</th>
<th>Not Routed</th>
<th>Not Routed</th>
<th>Not Routed</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Faculty Position</td>
<td>HR Position Management</td>
<td>President, EVP or Provost</td>
<td>Restricted Funds Area (depending on Dept/D)</td>
<td>Payroll Accounting</td>
<td>HR Position Management</td>
</tr>
</tbody>
</table>

Newly created, student, non-grant funded:

<table>
<thead>
<tr>
<th>Status: Pending</th>
<th>Pending</th>
<th>Not Routed</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Student Position</td>
<td>HR Position Management</td>
<td>Payroll Accounting</td>
</tr>
</tbody>
</table>

Minor revision (functional title change), full-time faculty, non-grant funded:

<table>
<thead>
<tr>
<th>Status: Pending</th>
<th>Pending</th>
<th>Not Routed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minor Revision Faculty Position</td>
<td>HR Position Management</td>
<td>President, EVP or Provost</td>
</tr>
</tbody>
</table>

Off Cycle Pay Change, full-time staff, non-grant:

<table>
<thead>
<tr>
<th>Status: Pending</th>
<th>Pending</th>
<th>Not Routed</th>
<th>Not Routed</th>
<th>Not Routed</th>
<th>Not Routed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Off-Cycle Pay Change</td>
<td>HR Position Management</td>
<td>Department VP or Dean</td>
<td>President, EVP or Provost</td>
<td>Payroll Accounting</td>
<td>HR Position Management</td>
</tr>
</tbody>
</table>
Ad Hoc Approvers and Reviewers

You may add additional approvers and reviewers to the approval path after you submit the request but before you log out of Manager Self Service. Any additional approver(s) must have security access for the Position Data Requests tool (See I. B.). Click on the green (+) button where you want to insert the approver/reviewer (Figure 11 on page 17).

III. My Pending Approvals

A. Email Notification of Pending Approvals

The Position Data Requests application manages the approval process by sending emails to approvers when there is a Position Data Request awaiting their approval. The email includes a direct link to the Position Data Request.

Subject: Position 01005505 is awaiting your approval in Campus Connect

A Position Request approval process in Campus Connect is waiting for you to take action:

Originator: Strawberry Shortcake
Position Number: 01005505
Functional Title: Cake Decorator
HR Title: Assistant
Department: 000123 – Pastries and Confections
Category: Student
Budget Change Required: N
Type of Action: New Position

You can review and approve this request using the link below. If clicking the link does not take you directly to the request page, you may need to copy and paste the link below directly into your browser’s address bar.


Click on the link in the email from the system administrator notifying you that a Position Data Request awaits your review.
B. Alternative Navigation to Approve Position Data Requests

1. Navigate to My Pending Approvals in Manager Self Service:
   Log in to Campus Connect > For Employees > Manager Self Service > Position Data Requests > My Pending Approvals (Figure 12).
C. Steps to Approve or Deny a Position Data Request

2. The **My Pending Approvals** page appears (Figure 13). Click on the **Position Number** of the position you wish to review.
3. **The Position Data Request with Approval Path** appears (Figure 14). Review the Position Data Request.

   For Minor Revisions, approvers may use the **Compare Changes** link (Figure 15). The **Position Modification Comparison** chart allows approvers to identify the changes that have been made to a position (Figure 16).

4. If necessary, enter comments in the **Comments** field. The initiator of the Position Data Request and other approvers and reviewers may view the comments.

5. To approve the request, click **Approve**. The request will continue to the next approver in the approval path.

   To push back the request, click **Push Back**. The request will return to the previous approver for editing and revision. The first approver in the approval path may not Push Back a request; they may only Approve or Deny a request.

   To deny the request, click **Deny**. The request will terminate.

Log off **Manager Self Service** or continue with other tasks.
Figure 15. Compare Changes Link

Figure 16. Position Modification Comparison
IV. Position Approval Form

The Position Approval Form link in Manager Self Service allows you to check the status of a Position Data Request you initiated or approved.

A. Monitoring the Approval Path

1. To monitor the approval path, navigate to **Position Data Requests** in Manager Self Service:

   Log in to Campus Connect > For Employees > Manager Self Service > Position Data Requests > Position Approval Form (Figure 17)
2. The Position Approval Form page appears (Figure 18). Enter the search criteria to search for a specific position or click Search to list all.

You can use the Position Approval Form to monitor Position Data Requests you initiated and/or Position Data Requests you approved or reviewed. Pending, approved, denied, and withdrawn requests appear in the Position Approval Form.

3. In the Search Results table, look under the Status column to determine the status of each request.

4. Click on the Position Number to view the Position Data Request, approval path, and approver comments.
B. Pending Status

If a Position Data Request status is pending, it is currently being reviewed by an approver. When the request is pending with an approver, the approval path box is blue and marked Pending.

C. Approved Status

If a Position Data Request status is approved, it has been approved by all approvers in the approval path. The approval path box is green and marked Approved.

D. Pushed Back Status

If a Position Data Request is pushed back, it is returned to the previous approver for editing. The approval path box is blue and marked Pushed Back. The approval path box for the previous approver returns to the blue pending status.

E. Denied Status

If a Position Data Request status is denied, the request has terminated. When an approver denies a request, the approval path box is red and marked Denied.
V. Delegating Position Data Requests

A. What is HR Delegation?

The President, Executive Vice President, Provost, Vice Presidents, and Deans may delegate a proxy to approve or deny Position Data Requests on their behalf.

B. When is HR Delegation Used?

Using the Manage Delegation application in PeopleSoft 9.0, approvers may delegate a Proxy to conduct transactions when:

- They are away from the office and would like others to manage transactions for a specific period of time;
- They prefer to have a staff member process transactions indefinitely.

C. Navigating to Manage HR Delegation in Manager Self Service

Use the following steps to navigate to Manager HR Delegation:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>From the CAMPUS CONNECT HOMEPAGE, navigate to Manager Self Service.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the For Employees Link.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the Manager Self Service Link.</td>
</tr>
<tr>
<td>4.</td>
<td>Manager Self Service page appears (Figure 23 A).</td>
</tr>
<tr>
<td>5.</td>
<td>Select Manage HR Delegation.</td>
</tr>
<tr>
<td>6.</td>
<td>Manage Delegation Page appears.</td>
</tr>
</tbody>
</table>

The Manage Delegation Page provides links to:

- **Learn More About Delegation:** FAQ’s about delegation
- **Create Delegation Request:** Choose transactions to delegate and proxies.
- **Review My Proxies:** Review list of delegated transactions the proxy for each transaction (See Figure 23 A).
- **Review My Delegated Authorities:** Review the list of transactions that have been delegated to you by others. Accept or reject pending delegation requests (See Figure 23 B).
Manage Delegation

Strawberry Shortcuts

- Manage Delegation
- Manage Learner
- Manage Learning Plan
- Manage Enquiry
- My Solutions
- homepage

Manage Learner

Strawberry Shortcuts

- Manage Learner
- Manage Learning Plan
- Manage Enquiry
- My Solutions
- homepage

Manage Learning Plan

Strawberry Shortcuts

- Manage Learning Plan
- Manage Enquiry
- My Solutions
- homepage

Manage Enquiry

Strawberry Shortcuts

- Manage Enquiry
- Manage Learning Plan
- Manage Learner
- My Solutions
- homepage

My Solutions

Strawberry Shortcuts

- My Solutions
- homepage

Manage Managers

Strawberry Shortcuts

- Manage Managers
- Manage Learning Plan
- Manage Enquiry
- My Solutions
- homepage

Figure 23. Navigating to Manage HR Delegation in Manager Self Service
D. Create Delegation Request Page

The first step to creating a delegation request is to specify the period of time for the delegation request.

Select the **Create Delegation** link. **Create Delegation Request Page** appears (Figure 24)

Select the date range or leave the **To Date** field blank for indefinite period of time. The **From Date** will default to the current date and cannot be earlier.

Select **Next**.
E. Select Transactions Page

Select Transactions Page appears (Figure 25).

Select the Position Management transaction.

Click Next.
F. Search for Proxy by Name

Select Proxy by Name appears (Figure 26)

Type in Search Terms:
  Last Name
  First Name

Select Search.

Name and Employee information populates the form.

Select Next.
Delegation Detail Page appears with name of Proxy, length of delegation authority and transaction (Figure 27).
Managers may review Proxy status (submitted, approved, revoked, ended, rejected) at any time by visiting Review My Proxies within the Manage HR Delegation application (Figure 28). Navigate to Manager Self Service > Manage HR Delegation > Review My Proxies. My Proxies Page shows request by status. Delegation status is not active until Proxy accepts request (Figure 29).

From the My Proxies page, managers may revoke or end delegation at any time (Figure 29).
G. Delegation Request E-mails

An e-mail is sent to the proxy once the request has been submitted. The email includes a link to the Manage Delegation Page.

**SAMPLE DELEGATION REQUEST E-MAIL**

<table>
<thead>
<tr>
<th>To: Sherlock Holmes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject: A delegation request from Strawberry Shortcake has been submitted for review and acceptance</td>
</tr>
</tbody>
</table>

Strawberry Shortcake or an administrator on behalf of Strawberry Shortcake has submitted a delegation request to you. Here are the details:

- **Transaction(s)**: Position Management
- **From**: 2008-06-10
- **To**:

You can review the request, then accept or reject the request, using the link below. If clicking the link does not take you directly to the request page, you may need to copy and paste the link below directly into your browser's address bar.


A proxy may accept or deny the request. Once this action is complete, an e-mail is sent to the Delegator with the Proxy’s response. The email includes a link to the Manage Delegation Page.

**SAMPLE CONFIRMATION E-MAIL**

<table>
<thead>
<tr>
<th>To: Strawberry Shortcake</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject: Sherlock Holmes has accepted a delegation request from Strawberry Shortcake</td>
</tr>
</tbody>
</table>

Sherlock Holmes has accepted a delegation request that you submitted. Here are the details:

- **Request Status**: accepted
- **Transaction**: Position Management
- **From**: 2008-06-10
- **To**:

Delegation Status: A

You can review the status of the request using the link below. If clicking the link does not take you directly to the request page, you may need to copy and paste the link below directly into your browser’s address bar.

H. Reviewing My Delegated Authorities

Proxies may view a list of transactions that have been delegated by others and accept or reject pending delegation requests by visiting the Review My Delegated Authorities page (Figure 28).

Figure 30. Review My Delegated Authorities

1. Navigate to Manager Self Service>Manage HR Delegation>Review My Delegated Authorities.

2. My Delegated Authorities allows Proxy to view delegated authorities and to accept or reject delegated authority at any time (Figure 31).
Figure 31. My Delegated Authorities
VI. Technical Support and On-line Resources

In addition to instructor-led training, The Office of Human Resources provides additional technical support and on-line instruction and job aids for PeopleSoft process improvements:

<table>
<thead>
<tr>
<th>Resource Type</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-line Training</td>
<td>hr.depaul.edu</td>
</tr>
<tr>
<td>On-line Job Aids</td>
<td>hr.depaul.edu</td>
</tr>
<tr>
<td>PDF Desk Reference</td>
<td>hr.depaul.edu</td>
</tr>
<tr>
<td>Technical Support E-mail box</td>
<td><a href="mailto:compensation@depaul.edu">compensation@depaul.edu</a></td>
</tr>
</tbody>
</table>

Additional support may be provided by contacting the HR Training Team:

Joyce Bracker  
Compensation Administrator  
jbracker@depaul.edu  
312.362.7557

Nancy Kogin  
Trainer  
nkogin@depaul.edu  
312.362.8338

Mary McGuinness  
Lead Training Specialist  
mmcguinn@depaul.edu  
312.362.7183

Jennifer Oles  
Senior Analyst  
joles@depaul.edu  
312.362.7422

Questions on budgeting and distribution may be directed to:

Anthony Andrade  
Financial Accounting  
aandra3@depaul.edu  
312.362.6583