Delegate Profile Setup for Agency Administrators



Delegate profile setup is a two-step process you must complete for each agency/division in your agency. This process adds the available managers to the Temporary Delegation pane.

Step 1 - Delegate Profile Setup (Temporary Delegation)

1. From the **Related** Items pane, select **Setup.** Then select **Delegate Profiles.**

SETUP	
Expand All Collapse A	I
Common Setup	
 → Delegate Profiles → HyperFind Queries → Query Manager 	

2. Select New from the Delegate Profiles screen.

DELEGATE PROFILES					
New	⇒	Edit ⇒	Duplicate →	Delete	Refresh
					Name 🔺
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- 3. Enter the name of the profile in the **Name** field.
- 4. Select the **Search** button to retrieve a list of available managers. To narrow the search, enter a letter or letters of the last name in front of the asterisk (*), then select **Search**.

DELEGATE PROFILES EDITOR						
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Accounting Mana	igers					
*Name: Accounting Managers						
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			1	Manager1, JohnA (10001)		
hnC (30001)		~		Manager1, JuniorA (10301)		
hnD (40001)			>			
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5. The Available Delegates display. Select the desired delegate(s), then the right arrow button 1 to move from Available Delegates to Selected Delegates.

NOTE: To select more than one delegate, hold down the CTRL key and click on each name, then the right arrow button. Additionally, if a new manager is added, the agency administrator will need to manually add the new manager to the delegate profile.

6. Click the **Save** button.



Step 2 - Assigning the Delegate Profile to the People Record

The Delegate Profile must be added to each manager's People record.

1. From the Agency Administrator workspace, select **Related Items>QuickFind** or any of the employee views.

Quickfind								
QuickFind	manager1, j	junior*			Q			
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Select All Rows	Column Selection	Filter		People	Timekeeping	Accrual	s Approval	Schedule
		Nam	ie			•	ID	
Manager1,	JuniorA					10	301	

- 2. Locate manager(s) to be added to the delegate profile.
- 3. Highlight the manager name(s).
- 4. Select **People>Edit**. The People Editor displays.
- 5. Select Job Assignment tab.
- 6. Select the Access Profiles link.
- 7. Select the profile from the **Delegate Profile** drop-down.

 Access Profiles 	
Function Access Profile:	AL - Manager
Display Profile:	AL - Manager
Locale Policy:	<none></none>
Notification Profile:	Inbox Only
Delegate Profile:	Accounting Managers

- 8. Click the **Save** button.
- 9. Repeat the above process for each manager.

The delegate managers above may now use the **Temporary Delegation** feature when needed. Refer to the **Manager Delegation** job aid for assistance.

If a manager needs to be removed from a delegate group, change the **Delegate Profile** in their People Record to reflect **Empty Profile**. Next, on the **Delegate Profiles Editor** screen, highlight the manager and move their name to the **Available Delegates** window using the arrow.

NOTE: A person cannot edit his/her own People Editor record. For those who need to be added to the new Delegate Profile, Step 2 will need to be completed by another Agency Administrator.