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Managing Delegations

You can use **Manage My Delegations** to delegate your approver responsibilities for time and absences to another Approver or HRO. Use delegations if you will be away from NYU on a day when timesheets need to be approved. It is important that you delegate your timesheet approver responsibilities to another Approver so this responsibility is handled in your absence. You can delegate the ability to perform these tasks as well as approve items sent to your Inbox.

HR Partners and other support roles have the ability to set up delegations on behalf of employees they support, and can do so with the task **Manage Delegation Settings** following the same steps below.

How to Create a New Delegation

You can create a delegation that allows a co-worker(s) to act on your behalf.

Steps:

1. Go to your **PeopleSync** homepage.
2. Enter Delegations into the search box at the upper left side of the page.
3. Click on **My Delegations** from Tasks and Reports section. View your current task delegations as well as edit or add a new delegation.
4. Click on **Current Delegations** to add a new delegation.
5. Click the **Manage Delegations** button.
 - Use the empty row to add a new delegation or click on the plus icon **+ sign** at the upper left side of the page beneath New Delegation to open a new delegation window to start a new row.
6. Enter a **Begin Date**. The date can't be prior to the current date.
7. Enter an **End Date**. The end date is required.
8. In the **Delegate** field enter the name of the employee you are delegating to or use the drop-down menu to get lists of individuals by these groups:
 - **Peers:** Individuals in the same organization as yours.
 - **Superiors:** Your manager and your manager's manager up through the organizational chart.

- **Subordinates:** Anyone that reports to you or any of your peers
 - 9. Place a checkmark next to the names of individuals to include.
 - 10. Click into an open space on the page to confirm the selection.
 - 11. **Use Default Alternate:** If checked, it automatically populates the Primary Manager as the Alternate Delegate. Note: In some circumstances, you may be identified as the alternate delegate. If so, uncheck the default and select a different alternative delegate.
 - 12. **Alternative Delegate:** The alternate serves as another individual to whom something will be delegated in the event the assigned delegate is not available.
 - 13. **Start on My Behalf:** Choose the tasks to delegate. You can:
 - Select **All** from the drop-down.
 - 14. Select the tasks by clicking into the checkbox for any of the following individual options:
 - Correct Absence
 - Enter Absence
 - Enter Time for Worker (delegation only)
 - Review Time (delegation only)
 - 15. **Do Inbox Tasks On My Behalf:** Choose the tasks you'd like your delegate to access and act on from your inbox from the following:
 - 16. **For All Business Processes:** Do not select this option, as it will enable the delegate to see everything in your PeopleSync inbox.
 - 17. Click on **For Business Process**.
 - 18. Enter **Time** into the search box and enter to view the time and absence options. Select one or all of the following options:
 - Correct Time Off
 - Enter Time
 - Request Time Off
 - 19. Check the **Retain Access to Delegated Tasks in Inbox** checkbox to retain access to the delegated tasks in your inbox.
 - Note: When this box is checked, you and your delegate both receive the actions in your inbox to act upon. However, once the action is completed, it no longer appears in either inbox.
 - 20. **Delegation Rule:** Skip this option.
 - 21. Enter any comments.
 - 22. Click the **Submit** button.
 - 23. Review the alert message informing you that you are given access to previously created items.
 - 24. Click the **Submit** button.
- Note: You can add more than one delegation.

How to Cancel or Modify a Delegation

You can modify the dates, tasks, and other information, as well as add new delegates or remove delegates from current delegations.

Steps:

1. Go to your PeopleSync homepage.
2. Enter **My Delegations** into the search box at the upper left side of the page.
3. Select **My Delegations** from Tasks and Reports section.

4. Click on **My Delegations** to open the Manage Delegation page.
5. Click on **Current Delegations**.
6. Click on the row you wish to edit or delete.
7. Click **Manage Delegations** at the bottom left of the page. Select one of the following options.
 - To Delete: Click the minus icon - to remove the row.
 - To Modify: Update the delegation fields as needed.
8. Click the **Submit** button.

Acting on Behalf of Another User Overview

When a delegate is added, the delegate receives a Notification informing them of the delegation. To act as the delegate and complete assigned tasks follow these steps.

Acting Upon a Delegated Task from Your Inbox

The delegate will receive inbox and email notifications when an employee submits an item for approval during the delegation period. You can access these items from your inbox.

Steps:

1. Click on your **Inbox** icon.
2. Select the inbox item to act on.
3. Click on **Switch Account**.
4. Click the **OK** button, after reviewing the message.
5. Click the **Inbox** icon.
6. Complete the inbox task(s).
7. Once you have acted on the task, switch back to your own account.
8. Click the **cloud icon** on the upper right corner of the page.
9. Click **Switch Account**.
10. Click your own name to exit the delegation.

Initiating a Delegated Task from Delegated Actions

During the delegation period, an employee may reach out to the delegate to enter or correct time. In these scenarios, the delegate can take action on the task by following these steps

Steps:

1. Click the **cloud icon** from your PeopleSync homepage at the upper right of the page.
2. Click **Switch Account** to switch to a delegated account from your **profile menu**.
3. Click the user for whom you are acting on behalf of.
4. Select the action you would like to take from Delegated Actions in the Reports and Tasks section.
5. Complete the appropriate task(s).
6. Click the **Switch Account** button, when completed with the tasks.
7. Click your own name.

Acting Upon a Delegated Task via Delegated Inbox

To act on a delegated task for your co-worker from their delegated inbox, complete these steps. This is another way to find delegated approvals appearing in your own inbox.

Steps:

1. Click the **cloud icon** from your PeopleSync homepage at the upper right of the page.
2. Click **Switch Account**.
3. Click on the **Inbox** icon on the upper left corner of the page and complete the action.
4. Once you have acted on the task, switch back to your own account.
5. Click the **cloud icon** on the upper right corner of the page.
6. Click on **Switch Account**.
7. Click your own name to exit the delegation.