

ResourceLink MyView Guidance

Delegation of Responsibilities & Authorisation

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carmarthenshire.gov.wales

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Delegation of Responsibility & Authorisations

The Delegation Module and allows for certain authorisation processes to be delegated within your span of control. Your delegation can be across managerial posts or to more junior posts.

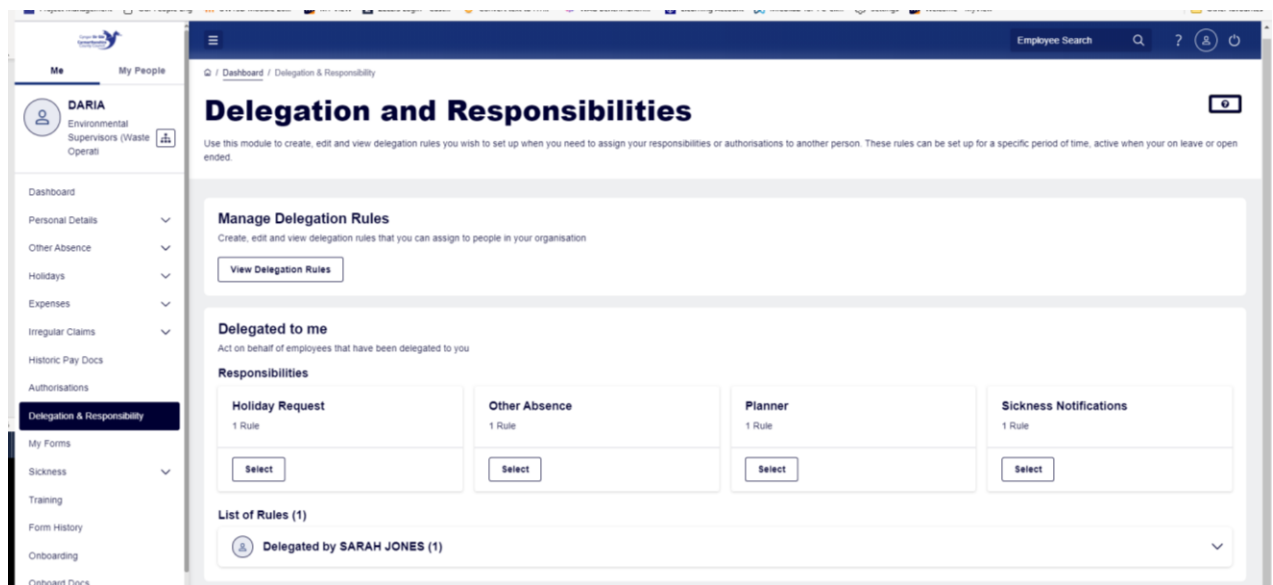
As with any form of delegation, it is essential that you consider the nature of the authorisation, its appropriateness in terms of responsibility, decision outcomes and duration for which it is to be enforced. The module will continue to alert you of authorisations granted on your behalf via email and in the Authorisations widget on your Dashboard.

It may be appropriate to an individual's role that certain responsibilities be delegated to ensure that local processes and administration are dealt with more effectively and consistently. Examples of this may include a manager designating an individual responsible for the submission of all Sickness Absence data for their Section/Unit.

Viewing Your Delegation Rules:

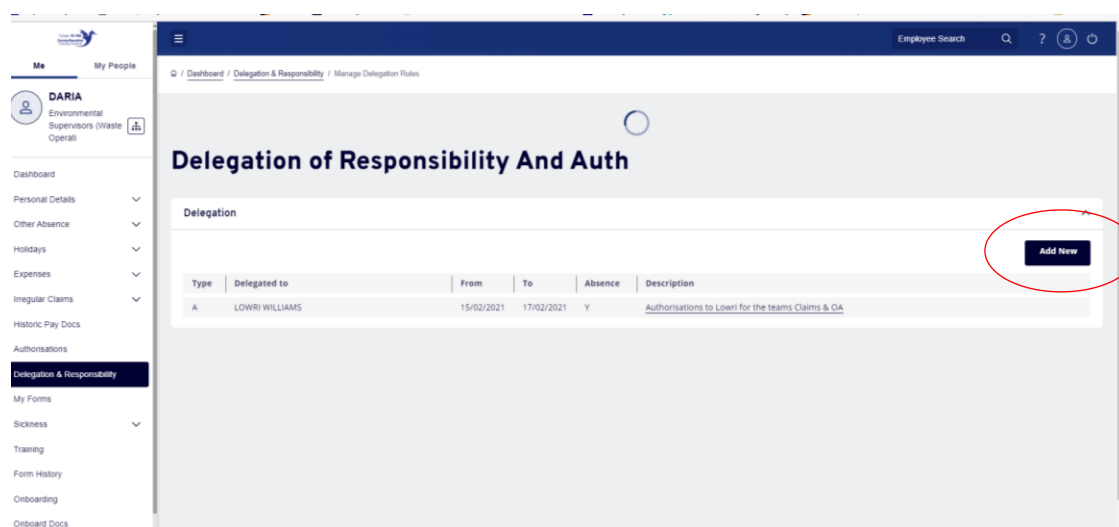
On your dashboard select **Delegation and Responsibility**. The first section shows the delegation rules you have created. The second section shows the delegations and responsibilities that have been delegated to you. The third section shows you who has delegated authorisations and responsibilities to you.

Click **View Delegation Rules** to see your list of delegation rules.



Creating a New Delegation Rule for Authorisations:

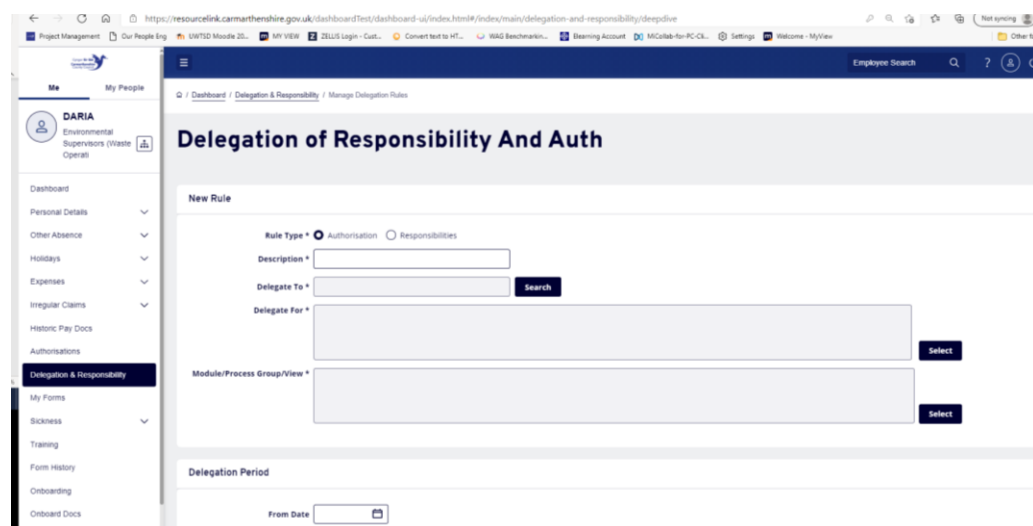
On your Dashboard, select **Delegation and Responsibility**, then **View Delegation Rules**, then click **Add New** in the right hand corner of the Delegations box.



You can see radio buttons for either **Authorisation** or **Responsibilities**:

- **Authorisations:** allows the staff member delegated to, to only authorise requests submitted by the selected employees e.g., annual leave, expenses
- **Responsibilities:** allows the staff member delegated to, to perform actions on behalf of the selected employees e.g., entering sickness notifications or viewing the planner.

Select **Authorisations**:



The **Description** field should be completed with a meaningful description for the delegation rule e.g., Authorising Sickness during annual leave (Lowri Williams).

Delegation of Responsibility And Auth

New Rule

Rule Type * ☒ Authorisation ☐ Responsibilities

Description * Authorising sickness while I am on annual leave

Delegate To *

Delegate For *

Module/Process Group/View *

Delegation Period

From Date

To Date

Abandon ☐

Suppress Email And Authorisation ☐

Click the **Search** button in the **Delegate To** field to open the search screen where you can search for employees to delegate the authorisations/responsibilities to. You can search by Surname, First Name, Known As, Previous Surname, Employee Number. Using employee number or first name and surname will reduce the number of search entries you return. Ticking the **Direct Reports Only** option will display a list of all employees that report directly to you. **Click Search.**

Delegation of Responsibility And Auth

AdvancedSearch

Surname:

First Name:

Known As:

Previous Surname:

Employee Number:

Direct Reports Only: ☐

Please enter criteria to retrieve matching employee data

After selecting the employee to delegate to, click **Continue** and then click on **Select** in the **Delegate For** field to select the members of your team whom this delegation applies to.

You can either choose:

- **Whole Team**, which will include any staff who report to a member of staff who reports directly to you.
- **Direct Reports**
- **People Individually**

Then **Click Continue**.

Delegation of Responsibility And Auth

Select Option: ☐ People Individually ☐ Direct Reports ☒ Whole Team

Employee Name	Employee Number	Post	Employee Information
DAIRA POLOHNSGA	6000002	Environmental Supervisors (Waste Operations) (002818)	
<input type="checkbox"/> GABRIEL REES	0006784	Environmental Technical Officer Waste Ops (015867)	
<input type="checkbox"/> JOAN SAMUEL	0016862	General Post Driver (HGV) (029012)	
<input type="checkbox"/> JONATHAN EVANS	6000004		
<input type="checkbox"/> DAVID WILLIAMS	0001927	Refuse/Recycling Driver (007962)	
<input type="checkbox"/> DYLAN LLOYD	0000335		
<input type="checkbox"/> ENRIE GARDNER	0016866		
<input type="checkbox"/> LILLY DAVIES	0001804		
<input type="checkbox"/> MICHELLE SABINE	6000005		Has another post
<input type="checkbox"/> OLIVER STONE	6000006		
<input type="checkbox"/> TODD MCARREY	0001823		
<input type="checkbox"/> JARIE DAVIES	6000008	Tractor Driver (013938)	Starting on 15/09/2025
<input type="checkbox"/> JARIE JAMES	6000007		
<input type="checkbox"/> MEGAN HUGHES	0000724		
<input type="checkbox"/> MICHELLE SABINE	6000005		Has another post
<input type="checkbox"/> LOUIE WILLIAMS	6000003	Trade Waste Loader (013771)	

[Back](#) [Continue](#)

Delegation of Responsibility And Auth

New Rule

Rule Type: ☒ Authorisation ☐ Responsibilities

Description:

Delegate To: [Search](#)

Delegate For: [Select](#)

Module/Process Group/View: [Select](#)

Delegation Period

From Date: [Calendar](#)

To Date: [Calendar](#)

☐ Absence

☐ Suppress Email And Authorisation

[Submit](#)

In the **Module/Process Group/View*** field click **Select** to choose which modules the rule applies to from the displayed list. **Click Continue** to complete the selection.

Delegation of Responsibility And Auth

Select the Module and Process Groups that you wish to delegate

Select All | Reset All

- ☐ Absence Planning
- ☐ Discipline
- ☐ Employee Appraisal
- ☐ Employee Directory
- ☐ General Admin
- ☐ Health and Safety
- ☒ Hiring Process
- ☐ Image Gallery
- ☐ Language Management
- ☐ Leave Management
- ☐ Loans
- ☐ Light Sides
- ☐ Manager
- ☐ Manager Recruitment
- ☐ Manager Reports
- ☐ Migration
- ☐ Migration
- ☐ Other Admin
- ☐ Pay Documents
- ☐ Peer Review Notifications
- ☐ Performance Management and Review
- ☐ Performance Management
- ☐ Project/Task Area
- ☐ Project/Task
- ☐ Project
- ☐ Query Tool
- ☐ Site Map
- ☐ Safety Training
- ☐ System Notifications
- ☐ Team Resource Planning
- ☐ Templates
- ☐ Training
- ☐ Transfers
- ☐ Tools
- ☐ Users

Back | Continue

Delegation of Responsibility And Auth

New Rule

Rule Type: ☒ Authorisation ☐ Responsibilities

Description:

Delegate To:

Delegate For:

Module/Process Group/View:

Delegation Period

From Date:

To Date:

Absence: ☐

Suppress Email And Authorisation: ☐

The **Delegation Period** will need to be defined:

- **From Date:** Should be completed with the date that the rule is effective from.
- **To Date:** Should be completed with an end date the rule is due to be active until or can be left blank if the rule is to be active indefinitely.
- **Absence:** Tick absence if the rule is only to be active when you are on leave/sick. The rule will become active once your absence has been authorised within MyView Dashboard.
- **Suppress Email Notifications:** Tick to suppress copies of the automatically generated email notifications to be sent to you while the rule is active.

Delegation of Responsibility And Auth

New Rule

Rule Type

☒ Authorisation
 ☐ Responsibilities

Description

Leave authorisation for team during absence to EL

Delegate To

LOWRI WILLIAMS

Search

Delegate For

Whole Team of Environmental Supervisors (Waste Operations) (002818)

Select

Module/Process Group/View

Holiday Request

Select

Delegation Period

From Date

24/03/2021

To Date

Absence

☒

Suppress Email And

Authorisation

☒

Submit

Click **Submit** to complete the process and create the delegation rule. You should receive a confirmation message on screen.

Employee Search

?

JS

Dashboard

Delegation & Responsibility

Manage Delegation Rules

Confirmation Message

Successfully created your delegation record

Continue

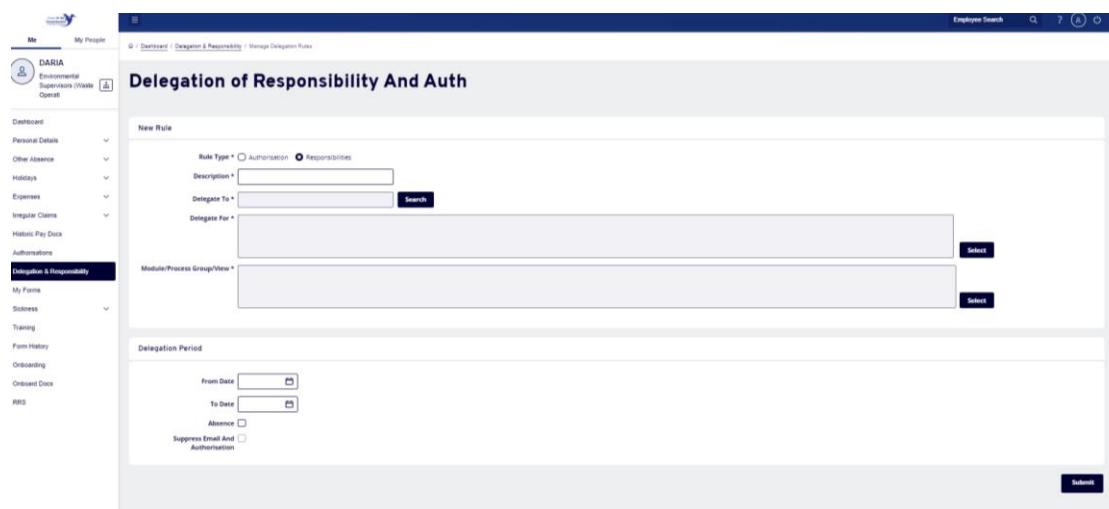
Creating a New Delegation Rule for Responsibilities

On your Dashboard, select **Delegation and Responsibility**, then **View Delegation Rules**, then click **Add New** in the right-hand corner of the Delegations box.

Select the radio button for **Responsibilities**:

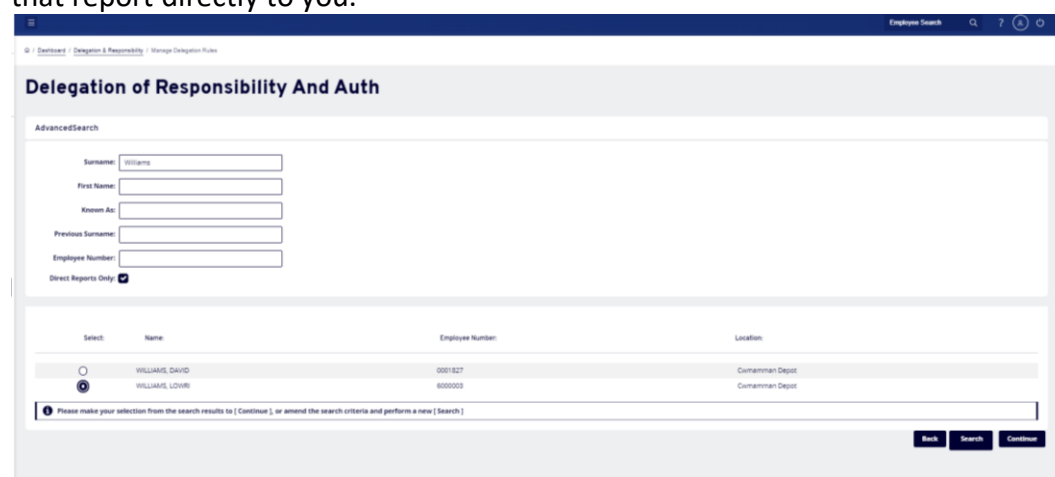
- **Responsibilities**: allows the staff member delegated to, to perform actions on behalf of the selected employees, based on the defined modules in the next step.

The **Description** field should be completed with a meaningful description for the delegation rule e.g., Responsibility for Health and Safety during annual leave (Lowri Williams).



Click the **Search** button in the **Delegate To** field to open the search screen where you can search for employees to delegate the authorisations/responsibilities to.

You can search by Surname, First Name, Known As, Previous Surname, Employee Number. Using employee number or first name and surname will reduce the number of search entries you return. Ticking the **Direct Reports Only** option will display a list of all employees that report directly to you.



After selecting the employee to delegate to, click **Continue** and then click on **Select** in the **Delegate For** field to select the members of your team whom this delegation applies to.

You can either choose:

- the **Whole Team**, which will include any staff who report to a specific member of staff, who reports directly to you. i.e., the whole hierarchy, every tier beneath your post
- **Direct Reports** – Only those directly below you, one tier down

- **Individuals** – specific people only

Delegation of Responsibility And Auth

New Rule

Rule Type * ☐ Authorisation ☒ Responsibilities

Description * Responsible for H&S during annual leave

Delegate To * LOWRI WILLIAMS

Delegate For * Whole Team of Environmental Supervisors (Waste Operations) (002818)

Module/Process Group/View *

Delegation Period

From Date

To Date

Absence ☐

Suppress Email And Authorisation ☐

In the **Module/Process Group/View*** field click **Select** to choose which modules the rule applies to from the displayed list.

Note: Creating Responsibilities, you must specify the access level against the module selected i.e., Submit, View Only, Save and Submit or Save only.

Delegation of Responsibility And Auth

Select the Modules, Process Groups and Views that you wish to delegate.

<input type="checkbox"/> Document View Onboarding Docs	Save & Submit
<input type="checkbox"/> Employee Appraisals	View Only
<input type="checkbox"/> Expense Claims	View Only
<input checked="" type="checkbox"/> Holiday Request	Save & Submit
<input type="checkbox"/> Irregular Claims	View Only
<input type="checkbox"/> Language Attainments	Save & Submit
<input type="checkbox"/> MyForm	View Only
<input type="checkbox"/> Organisation	View Only
<input type="checkbox"/> Other Absence	View Only
<input type="checkbox"/> Pay Documents	View Only
<input type="checkbox"/> Personal Details	View Only
<input type="checkbox"/> Planner	View Only
<input type="checkbox"/> Sickness Notifications	View Only
<input type="checkbox"/> Training	View Only
<input type="checkbox"/> eForm	View Only

The **Delegation Period** will need to be defined:

- **From Date:** Should be completed with the date that the rule is effective from.
- **To Date:** Should be completed with an end date the rule is due to be active until or can be left blank if the rule is to be active indefinitely.

The screenshot shows the 'Delegation of Responsibility And Auth' form in the MyView Dashboard. The form is titled 'New Rule' and has two tabs: 'Rule Type' (with 'Authorization' selected) and 'Responsibilities'. The 'Description' field contains 'Leave authorisation for team during absence to E'. The 'Delegate To' field has a dropdown menu with 'LOUISE WILLIAMS' selected and a 'Search' button. The 'Delegate For' field has a dropdown menu with 'Whole Team of Environmental Supervisors (House Operations) (00010)' selected and a 'Select' button. The 'Module/Process Group/View' field has a dropdown menu with 'Holiday Request - Save & Submit' selected and a 'Select' button. The 'Delegation Period' section has 'From Date' and 'To Date' fields, both with calendar icons. There are checkboxes for 'Absence' and 'Suppress Email And Authorisation'. A 'Submit' button is at the bottom right.

- **Absence:** Tick absence if the rule is only to be active when you are on leave/sick. The rule will become active once your absence has been authorised within MyView Dashboard.

Suppress Email Notifications: is not an available function for responsibilities.

A confirmation message appears when the rule is completed successfully. Click **Continue**.

The screenshot shows a confirmation message box with a green checkmark icon. The text inside the box reads: 'Confirmation Message: Successfully created your delegation record'. A 'Continue' button is located at the bottom right of the box.

The screen then returns to the delegation page showing all the delegations you have created or apply to you.

2 | Dashboard / Delegation & Responsibility / Manage Delegation Rules

Delegation of Responsibility And Auth

Delegation ▲

[Add New](#)

Type	Delegated to	From	To	Absence	Description
A	LOWRI WILLIAMS	24/03/2021		Y	Leave authorisation for team during absence to ELW
A	LOWRI WILLIAMS	15/02/2021	17/02/2021	Y	Authorisations to Lowri for the teams Claims & OA
A	MICHELLE SABINE	22/02/2021	26/02/2021	N	Overtime & Expenses Requests
A	OLIVER STONE	22/02/2021		Y	Authorisation of Leave, etc
R	JONOTHAN EVANS	15/02/2021		N	Who is this going to? What is it for?

Delegated rules ▲

Type	Delegated from	From	To	Absence	Description
R	SARAH JONES	08/02/2021		N	Absence Responsibilities to Daria for Sarah Thomas

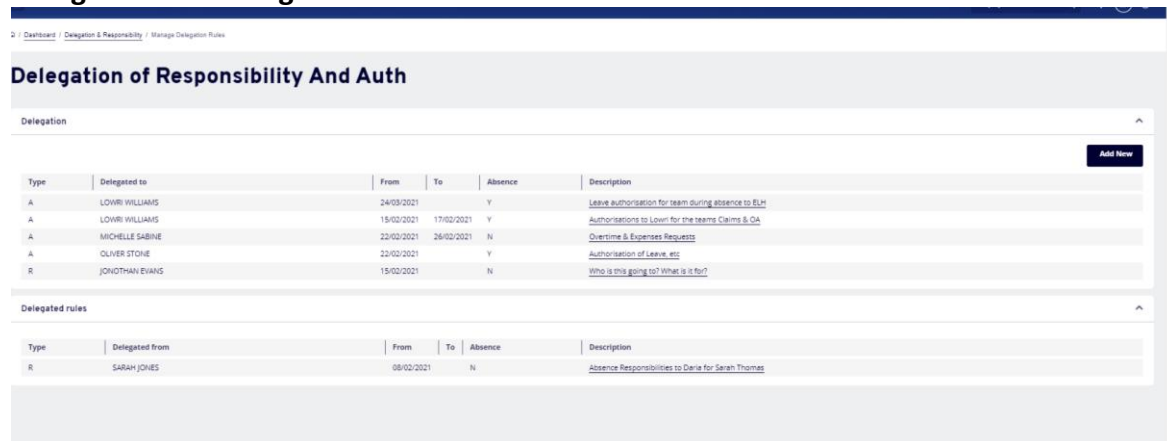
Please note, if you create a responsibility for a member of staff to input absences that require authorisations on your behalf (e.g., Annual Leave/Other Absence) and you would like these to be automatically be authorised by that staff member, then you will also need to create a separate Authorisation rule for those modules to be delegated to that staff member.

Please note that if you have a staff member who is also managed by another service manager then whoever is the “Main Post” manager will need to create a delegation rule for authorisations and responsibilities to the non-main post manager so that the absences/forms that they submit are also automatically authorised, rather than these requests requiring authorisation by the main post manager.

Amending Delegation Rules

To view or amend a delegation rule, click **Delegation & Responsibilities** and then **View Delegation Rules** in the **Manage Delegations Rules** box.

A list of all the delegation rules created by yourself/on behalf of you will be displayed in the **Delegation** and **Delegated rules** boxes:



The screenshot shows a web interface titled "Delegation of Responsibility And Auth". It contains two tables. The first table, "Delegation", has columns: Type, Delegated to, From, To, Absence, and Description. It lists five rules with types A or R, delegated to various staff members, and active dates. The second table, "Delegated rules", has columns: Type, Delegated from, From, To, Absence, and Description. It lists one rule with type R, delegated from Sarah Jones, and active from 08/02/2021.

Type	Delegated to	From	To	Absence	Description
A	LOWRI WILLIAMS	24/09/2021		Y	Leave authorisation for team during absence to ELM
A	LOWRI WILLIAMS	15/02/2021	17/02/2021	Y	Authorisations to Lowri for the teams Claims & CA
A	MICHELLE SABINE	22/02/2021	26/02/2021	N	Overtime & Expenses Requests
A	OLIVER STONE	22/02/2021		Y	Authorisation of Leave, etc
R	JONOTHAN EVANS	15/02/2021		N	Who is this going to? What is it for?

Type	Delegated from	From	To	Absence	Description
R	SARAH JONES	08/02/2021		N	Absence Responsibilities to Dania for Sarah Thomas

The Type is either displayed as **A** – Authorisation or **R** – Responsibility.

- **Authorisations:** allows the staff member delegated to, to only authorise requests submitted by the selected employees e.g., annual leave, expenses
 - **Responsibilities:** allows the staff member delegated to, to perform actions on behalf of the selected employees e.g., entering sickness notifications or viewing the planner
- Delegated to** displays the name of the individual the rule is delegated to.

From and **To** show the dates the rule is active for. A blank **To** shows the rule is continually active.

Absence displays a N when the rule is active continually or Y when the rule is only active when the delegating manager is absent from work.

Description is the rule name defined when the rule was created. This is shown in a different colour to the other fields as this is hyperlinked. Click on the writing in the description field to view the definition of the rule. To amend the rule, **click** on the **underlined description** which will open the delegation rule.

Dashboard / Delegation & Responsibility / Manage Delegation Rules

Delegation of Responsibility And Auth

Edit Delegation

Rule Type ☒ Authorisation ☐ Responsibilities

Description * Leave authorisation for team during absence to EL

Delegate To LOWRI WILLIAMS

Delegate For * Whole Team of Environmental Supervisors (Waste Operat) (002818)

Module/Process Group/View * Holiday Request

Delegation Period

From 24/03/2021

To

Absence ☒

Suppress Email And Authorisation ☒

Back Edit

Click **Edit** under the Delegation Period:

This activates all fields ready for amendment. Please use the rule creation technique to amend your rule. Click **Submit** to confirm the changes or **Delete** to remove the rule.

Delegation of Responsibility And Auth

Edit Delegation

Rule Type ☒ Authorisation ☐ Responsibilities

Description * Leave authorisation for team during absence to EL

Delegate To LOWRI WILLIAMS

Delegate For * Whole Team of Environmental Supervisors (Waste Operat) (002818)

Module/Process Group/View * Holiday Request

Delegation Period

From 24/03/2021

To

Absence ☒

Suppress Email And Authorisation ☒

Back Submit Delete

Redirecting Delegation Rules Assigned to You

The **Manage Delegation Rules** and **List of Rules** sections both display the Delegation Rules assigned to you. To view one of these rules, click **View Delegation Rules** in the **Manage Delegation Rules** box or click on the **down arrow** on the right-hand side of the name of the person who has delegated a rule to you in the **List of Rules** box.

Delegation and Responsibilities

Use this module to create, edit and view delegation rules you wish to set up when you need to assign your responsibilities or authorisations to another person. These rules can be set up for a specific period of time, active when your on leave or open ended.

Manage Delegation Rules
Create, edit and view delegation rules that you can assign to people in your organisation.

[View Delegation Rules](#)

Delegated to me
Act on behalf of employees that have been delegated to you.

Responsibilities

Holiday Request	Other Absence	Planner	Sickness Notifications
1 Rule	1 Rule	1 Rule	1 Rule
Select	Select	Select	Select

List of Rules (1)

[Delegated by SARAH JONES \(1\)](#)

Click on the underlined writing against the rule to open the rule definition.

Delegation of Responsibility And Auth

Delegation

Type	Delegated to	From	To	Absence	Description
A	LOWRI WILLIAMS	24/03/2021		Y	Leave authorisation for team during absence to ELM
A	LOWRI WILLIAMS	15/02/2021	17/02/2021	Y	Authorisations to Lowri for the teams Claims & OA
A	MICHELLE SABINE	22/02/2021	26/02/2021	N	Overtime & Expenses Requests
A	OLIVER STONE	22/02/2021		Y	Authorisation of Leave, etc
R	JONATHAN EVANS	15/02/2021		N	Who is this going to? What is it for?

Delegated rules

Type	Delegated from	From	To	Absence	Description
R	SARAH JONES	06/02/2021		N	Delegation Responsibilities to Denise for Sarah Jones

List of Rules (4)

Rules apply when the delegating manager is absent

Delegated by (2)			
Module Access	26/01/2018	Planner & Sickness for Team	
Authorisation	26/01/2018	Delegation for Team	

Delegated by (1)			

The screen shows the properties of the delegation rule that has been assigned to you. The screen will tell you if it is an authorisation or responsibility, what you can see and do because of the rule who it is delegated from and to and when the rule is valid. The absence box will be ticked if the rule is only valid during the delegator's absence. The redirect to option allows you, as the person in receipt of the rule, to redirect it to another.

Note: This is not a temporary feature the redirect can only be changed by the person who created the rule originally.

Delegation of Responsibility And Auth

Delegated Rule

Rule Type ☐ Authorisation ☒ Responsibilities

Description Absence Responsibilities to Daria for Sarah Thomas

Module/Process
Group/View

Holiday Request - Save & Submit
Other Absence - Save & Submit
Planner - View Only
Sickness Notifications - Save & Submit

Delegated To DARIA POLOHNSKA

Delegated For SARAH THOMAS Known As SARAH (Emp0001810, Post: Environmental Supervisors (Waste Operat) (002818))

Rule is Valid When

Date From 08/02/2021

Date To

Absence ☐

Redirect To

Redirect To

Search

Save

Click **Search** to find the person you want to redirect to, type in the name in the boxes or tick direct reports only to pick from a list. Click the **radio button** by the person's name and click **Continue**.

Delegation of Responsibility And Auth

Advanced Search

Surname: williams

First Name:

Known As:

Previous Surname:

Employee Number:

Direct Reports Only: ☒

Select:

Name:

Employee Number:

Location:

☐

WILLIAMS, DAVID

0001827

Cwmaman Depot

☐

WILLIAMS, LOWRI

6000003

Cwmaman Depot

Please make your selection from the search results to [Continue], or amend the search criteria and perform a new [Search]

Back

Search

To select the individual the rule is to be redirected to, click on the Radio button next to the person's name and then click **Continue**.

Redirect To

Redirect To LOWRI WILLIAMS

Search

Save

Then click **Save**.

Delegation of Responsibility And Auth						
Delegation						
Type	Delegated to	From	To	Absence	Description	
A	LOWRI WILLIAMS	24/02/2021	17/02/2021	Y	Leave authorisation for team during absence to BLH	
A	LOWRI WILLIAMS	19/02/2021	17/02/2021	Y	Authorisation to Lowri for the teams Claims & QA	
A	MICHELLE SABINE	22/02/2021	26/02/2021	N	Overnight & Expense Reimburse	
A	OLIVER STONE	22/02/2021		Y	Authorisation of Leave Abs	
R	JONATHAN EVANS	19/02/2021		N	Who is this going to? What is it for?	
Redirected Delegated rules						
Type	Redirected to	From	To	Absence	Description	
R	LOWRI WILLIAMS	08/02/2021		N	Absence Responsibilities to Daria for Sarah Thomas	

Removing a Redirected Delegation Rule

Navigate to Manage Delegation Rules

The screenshot shows the 'Delegation of Responsibility And Auth' page. It contains two tables. The first table, 'Delegation', lists various delegation rules with columns for Type, Delegated to, From, To, Absence, and Description. The second table, 'Redirected Delegated rules', lists rules that have been redirected, also with columns for Type, Redirected to, From, To, Absence, and Description.

Type	Delegated to	From	To	Absence	Description
A	LOWRI WILLIAMS	24/03/2021		Y	Leave authorisation for team during absence to ELH
A	LOWRI WILLIAMS	15/02/2021	17/02/2021	Y	Authorisations to Lowri for the teams Claims & OA
A	MICHELLE SABINE	22/02/2021	26/02/2021	N	Overtime & Expenses Requests
A	OLIVER STONE	22/02/2021		Y	Authorisation of Leave, etc
R	JONOTHAN EVANS	15/02/2021		N	Who is this going to? What is it for?

Type	Redirected to	From	To	Absence	Description
R	LOWRI WILLIAMS	08/02/2021		N	Absence Responsibilities to Daria for Sarah Thomas

Then in the **Redirected Delegated rules** box, click on the **Description** of the rule that you wish to amend:

The screenshot shows the 'Delegation of Responsibility And Auth' page with the 'Redirected Rule' form. The form includes fields for Rule Type (Authorisation or Responsibilities), Description, Module/Process Group/View, Delegated To, and Delegated For. It also has a section for 'Rule is Valid When' with Date From, Date To, and Absence checkboxes. At the bottom, there is a 'Current Redirection' section with a 'Redirected To' field and a 'Remove Redirection' button.

Delegation of Responsibility And Auth

Redirected Rule

Rule Type: ☐ Authorisation ☒ Responsibilities

Description:

Module/Process Group/View:

Delegated To:

Delegated For:

Rule is Valid When

Date From:

Date To:

Absence: ☐

Current Redirection

Redirected To:

Remove Redirection

The **Redirected Rule** will then display, scroll to the bottom of the screen click **Remove Redirection**.

Should you require any further assistance please email us with your employee number and a short description of your query to resourcelink@carmarthenshire.gov.uk