Instruction Set: Manage Delegation

These instructions will show you how to create and revoke a delegation request, and to accept or reject a delegation request.

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ACCESS THE MANAGE DELEGATION PAGE

From the main Boise State University website, click on the link to my.boisestate at the top of the page, as shown in the illustration below.
On the my.boisestate page, click the Faculty/Staff sign in link:

A login window will appear. Log in using your Boise State username and password. If you are still logged in to my.boisestate from a previous session, you would skip this step and be taken directly to the page shown in the following step.
Click on the PeopleSoft link:

The home page for PeopleSoft will appear and it should look similar to the one shown in the illustration below. There may be a slight variation in the layout of the page depending on your browser/zoom settings or what you have access to. First check to see which system you are working in (indicated in the yellow highlighted area below). You'll notice below that this person is working in the Student Administration system. The Hire New Candidate (Student) form cannot be accessed in the Student Administration or Financial Information systems. Click the Human Resources link (green box) to move into the HR system.
You will know you’re working in the Human Resources system if you see “HR” up at the top next to your user ID (see red box below).

Next, locate the Candidate/Employee Transaction link in the HR Self Service box and click on the link:
A new page will come up with more options. Since you’re managing delegation tasks, click the Manage Delegation link.

Before we get into delegating approval authority you may want to get additional information about PeopleSoft delegation by clicking on “Learn More about Delegation” link.
CREATE A DELEGATION REQUEST (DELEGATE TO SOMEONE)

To delegate approval authority to someone you must first create a delegation request. The person you’re delegating to can either accept your request (and become the delegate) or reject the request. We will cover more about accepting/rejecting requests in a moment. First let’s create a delegation request. Begin by clicking on Create Delegation Request link.

First you must select the date on which you want to begin delegating your approval authority. Either enter the date in the field or click the small calendar icon to choose the date from a calendar. Enter a To date as well, or leave the date field blank if your delegation time frame is indefinite. Once you have selected the delegation To/From dates, click the Next button.
Next you must indicate what type of transaction(s) your delegate will be asked to approve. Check the box next to all that apply and proceed by clicking the Next button.

Next you will locate the person you are delegating to. The page below will show any direct reports you have, and your direct supervisor. Click the small radio button next to the person’s name and click the Next button to proceed. If the person you want to delegate to does not appear in the list, click the Search By Name link (highlighted in yellow below) to search for the person.
If you clicked the Search by Name link you can search for this individual by first and/or last name. Enter their name into the fields provided. The system will validate what you’re entering after you click out of the fields. Click the Search button and select the person from the list of search results. Click the Next button to proceed.

A summary page (below) will appear showing you the name of the person (Proxy) you are delegating to, as well as the dates of delegation and the type(s) of transactions the person will have your permission to approve. If everything is accurate, click Submit and then Ok on the confirmation page that follows. If you need to go back and make changes to your request, click the Previous button.
When you return to the Manage Delegation home page you will see an addition section called “Review My Proxies”. This is where you can review the status of any delegation requests you’ve submitted.

If you clicked Review My Proxies in the previous step you will see the list of individuals you have delegated to already. You can refine the list by using the Status drop down list. You’ll be able to see all delegations that were accepted or rejected by the delegate, delegations that you’ve submitted (but have not yet been accepted), requests that you have revoked, and delegations that have ended.

Proceed to the next section of this instruction set to learn how to revoke a delegation. You’ll start from the same screen shown below.
REVOKE A DELEGATION REQUEST (WITHDRAW DELEGATION)

In the Manage Delegation portal you will start by clicking the Review My Proxies link (see previous steps). You’ll arrive at the page below. To revoke a delegation simply click the radio button next to the person’s name and click Revoke.

You’ll see a confirmation question appear. If you’re sure you want to proceed with the revocation, click Yes.

You’ll get a confirmation that the delegation has been revoked.

Refer to the My Proxies page to view revoked delegation requests.
ACCEPTING OR REJECTING A DELEGATION REQUEST

If someone wants to delegation approval authority to you, they should have submitted a delegation request. You will receive an email notification directing you to review the request and either accept or reject it. Below is an example of the delegation request email. To review the request, click the blue hyperlink in the email. You will need to log in to PeopleSoft to access the request.

After clicking the hyperlink in the email notification you will be forwarded to a PeopleSoft login page, or if you’re already logged in through my.boisestate you will be taken directly to the Manage Delegation page where you can review the delegation request by clicking Review My Delegated Authorities.

Manage Delegation

Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.

Learn More about Delegation

Select Create Delegation Request to choose transactions to delegate and proxies to act on your behalf.

Create Delegation Request

Select Review My Delegated Authorities to see the list of transactions that have been delegated to you by others, and to accept or reject pending delegation requests.

Review My Delegated Authorities
A new page showing the delegation request appears (below). You can choose to accept the delegation by clicking **Accept**, or reject the delegation by clicking **Reject**. Whichever you choose, an email notification will be sent to the person who is delegating to you telling them you’ve either accepted or rejected their delegation request.

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This page allows you to view your delegated authorities. Select a particular status and click **Refresh** to show the matching requests. Click the information icon for request details.