

This guide outlines the steps to follow to delegate your approval authorities to other colleagues so that your approvals can be processed in the event of your planned absence.



1. Navigate to Roles and Delegations



2. Select Approval Delegations



3. Set the approval delegation rules

01

All employees will process different types of transactions in Oracle Fusion that will generate approval requests.

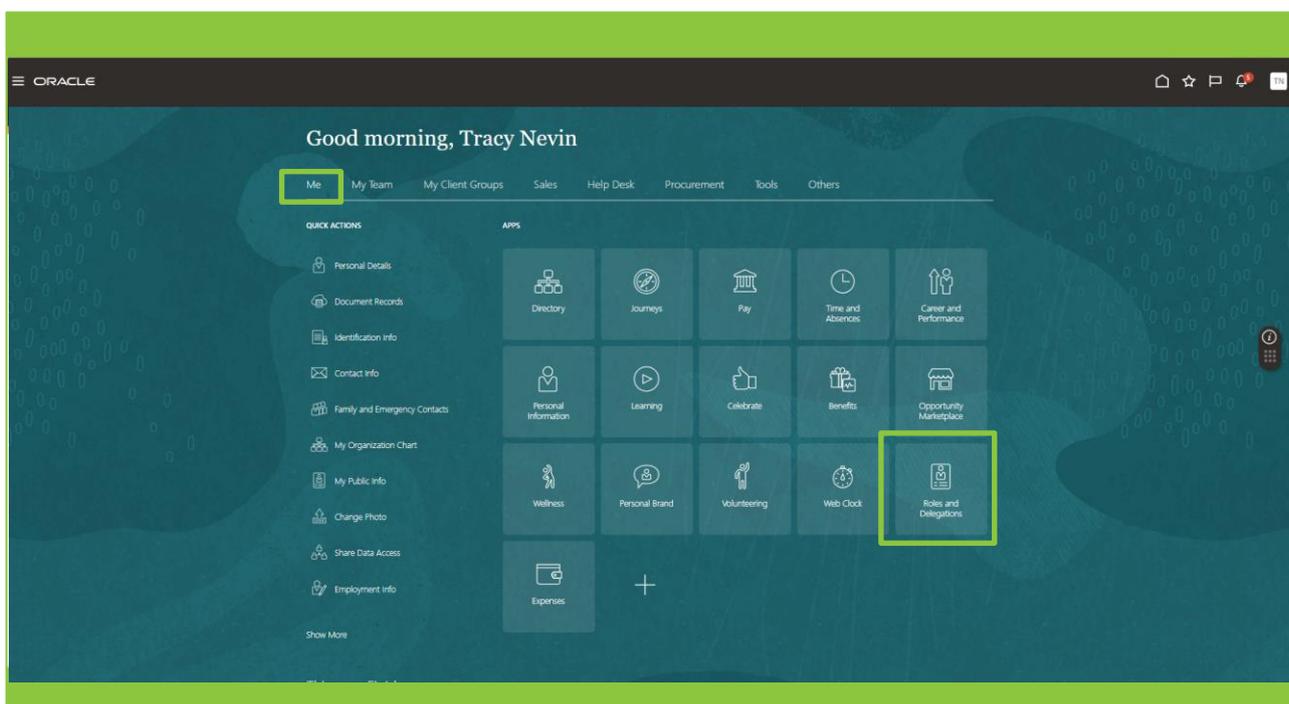
The in-system workflow will direct approval requests to the appropriate approver(s). For example, if a colleague raises a request to book annual leave, that request will be directed to their line manager for review and approval.

Examples of different types of approval requests that an approver may receive include:

- Leave requests
- Expense approvals
- Time card approvals (including overtime claims)
- Purchase requisition requests
- General ledger journal approvals

If you are going to have a planned absence away from work, for example you are taking some annual leave, then you can delegate your approvals to other colleagues.

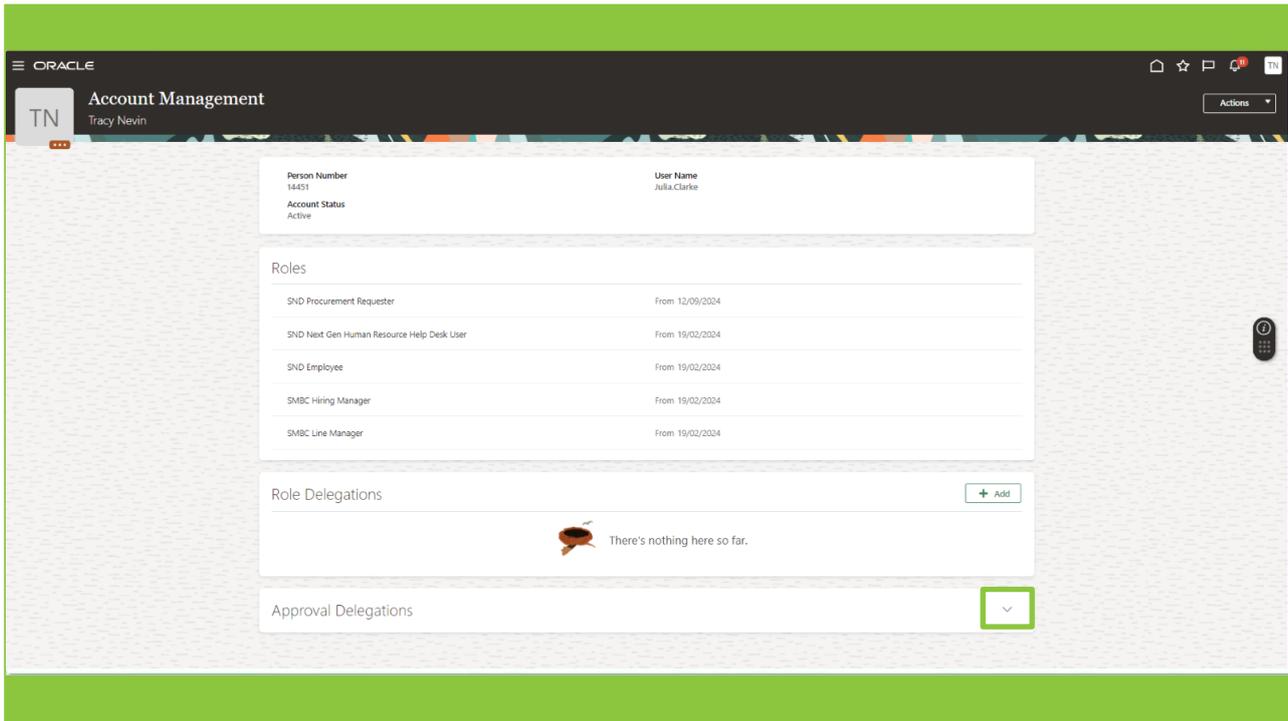
To delegate your approvals, from your Oracle Fusion homepage, navigate to the **Me** tab. Next select the **Roles and Delegations** application tile.



02

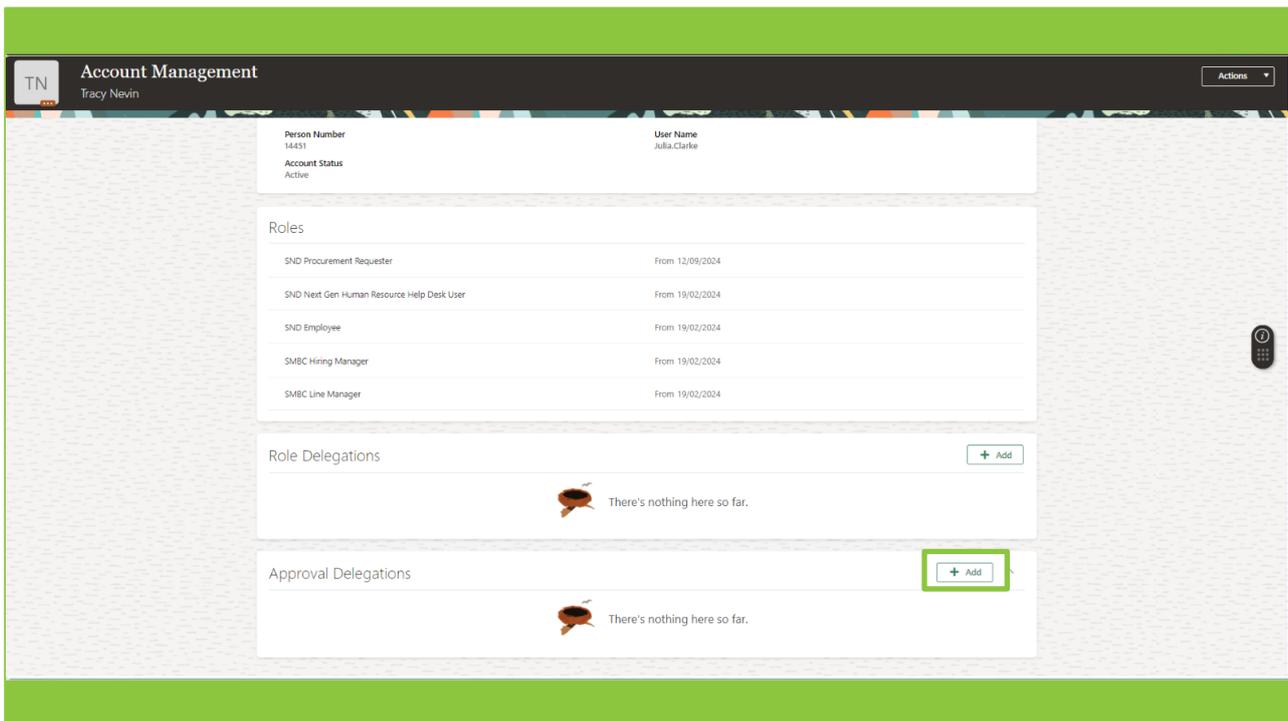
The **Account Management** page is displayed.

Navigate to the **Approval Delegations** section and select the **down pointing arrow** to expand the section.



03

The **Approval Delegations** section opens. Select the **Add** button.

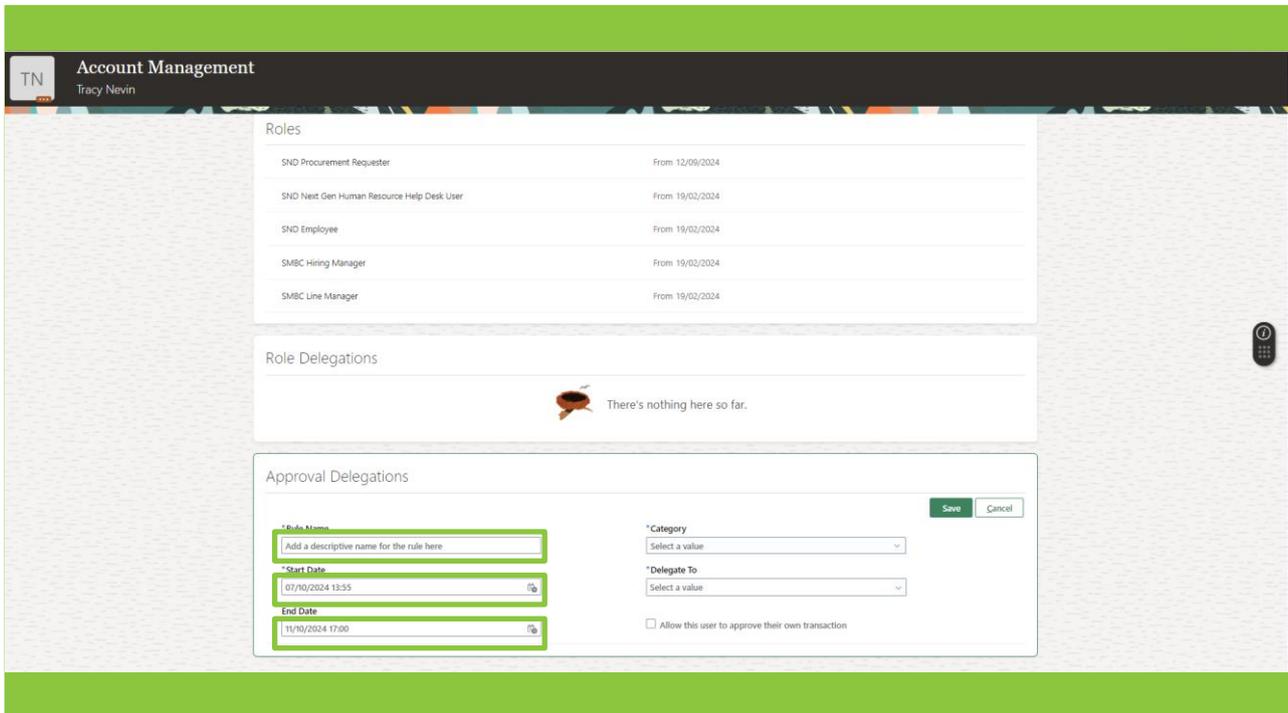


04

Enter a **Rule Name** for the approval delegation rule you wish to add. This is a free format text entry.

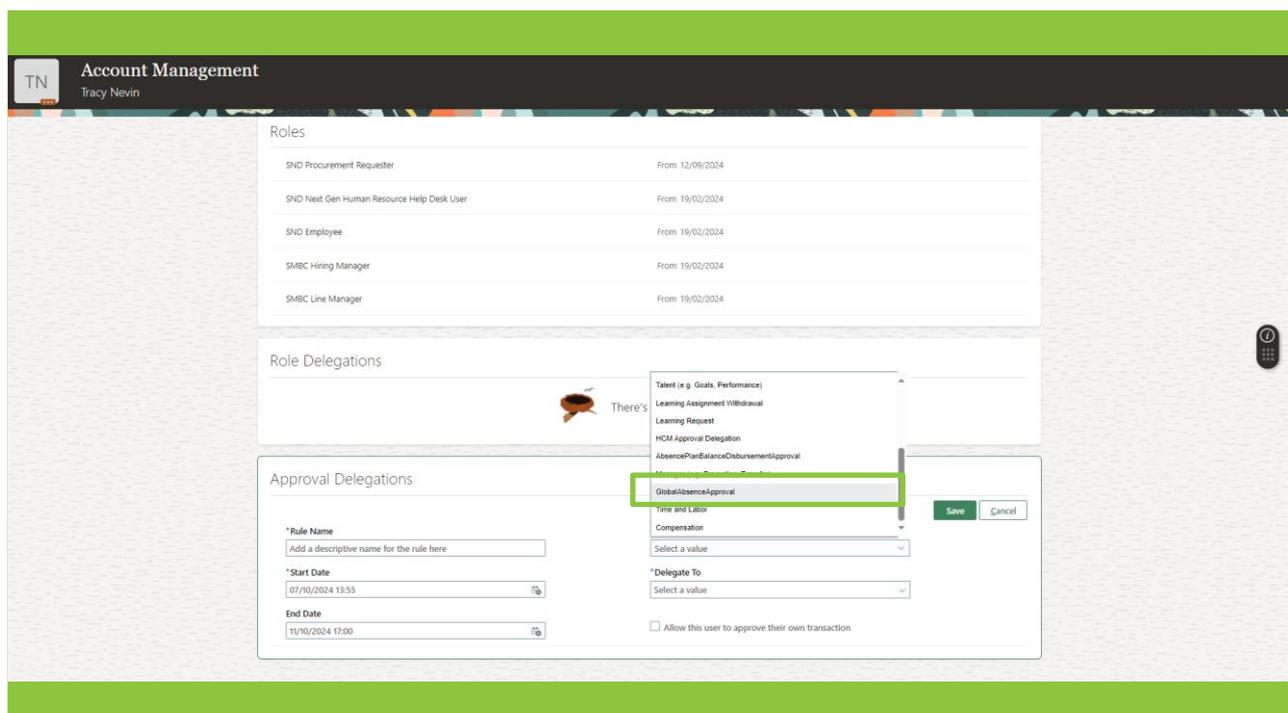
Next, use the date picker tool to select a **Start Date** and time for when the rule will be effective from.

If you know when you will be returning to work and therefore know when approval delegation can come to an end, you have the option to add an **End Date** for the rule.



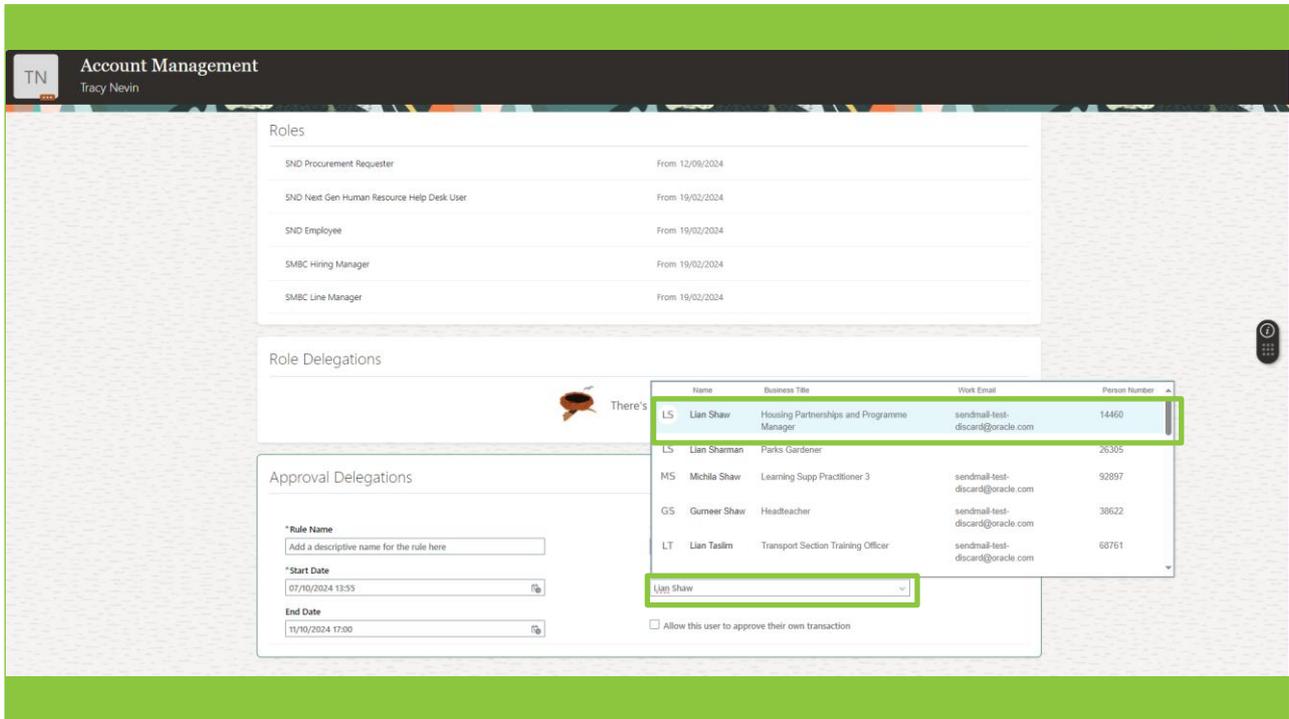
05

In the **Category** field, select the type of approval that you wish to delegate from the drop-down list of options. In this example the user wishes to delegate absence request approvals, so the **Global Absence Approval** option has been selected.



In the **Delegate to** field, type in the name of the person that you wish to delegate this approval type to, then select their name from the drop-down list.

Note: the person that you delegate to **must be at the same level as you or above in the organisational hierarchy and they must also be an existing line manager**. This is to make sure that your deputy approver has both the appropriate financial authority levels and the correct access to the system to be able to process the approvals.



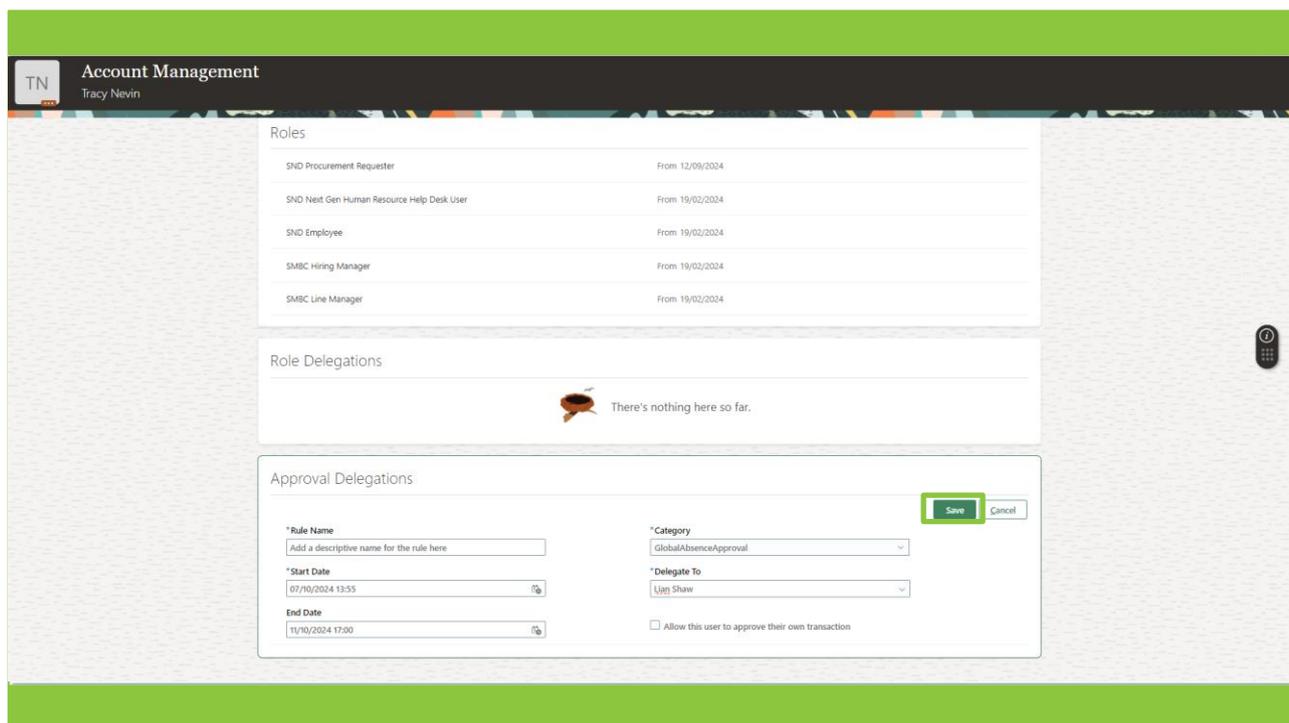
The screenshot shows the 'Account Management' interface for Tracy Nevin. The 'Role Delegations' section is active, and a dropdown menu is open, listing the following users:

Name	Business Title	Work Email	Person Number
LS Lian Shaw	Housing Partnerships and Programme Manager	sendmail-test-discard@oracle.com	14460
LS Lian Shaman	Parks Gardener		26305
MS Michla Shaw	Learning Supp Practitioner 3	sendmail-test-discard@oracle.com	92897
GS Gumeer Shaw	Headteacher	sendmail-test-discard@oracle.com	38622
LT Lian Taslim	Transport Section Training Officer	sendmail-test-discard@oracle.com	68761

The 'Delegate To' field in the 'Approval Delegations' section is set to 'Lian Shaw'. The 'Allow this user to approve their own transaction' checkbox is unchecked.

Note the **Allow this user to approve their own transaction** field must not be used. It is contrary to Council policy for an individual to be able to make a request on their own behalf, and then to be able to approve it.

Select the **Save** button. The approval rule will now be effective from the selected start date and time.



The screenshot shows the 'Approval Delegations' form with the following details:

- Rule Name:** Add a descriptive name for the rule here
- Start Date:** 07/10/2024 13:35
- End Date:** 11/10/2024 17:00
- Category:** GlobalAbsenceApproval
- Delegate To:** Lian Shaw
- Allow this user to approve their own transaction:**

The **Save** button is highlighted in green.

To add additional rules for different approval types, select the **Add** button and then follow steps 4 – 7 in this guide. Note that different types of approvals may be delegated to different deputy approvers.

To edit or cancel an existing rule, firstly select the **pencil** icon.

The screenshot shows the 'Account Management' interface for Tracy Nevin. The 'Approval Delegations' section is visible, showing a table with one entry: '07/10/2024 13:55 To 11/10/2024 17:00 Delegated To Lian Shaw'. The 'Add' button is highlighted with a green box, and a pencil icon is also visible next to the entry.

Person Number	User Name
14451 Account Status Active	Julia Clarke

Roles	From
SND Procurement Requester	From 12/09/2024
SND Next Gen Human Resource Help Desk User	From 19/02/2024
SND Employee	From 19/02/2024
SMBC Hiring Manager	From 19/02/2024
SMBC Line Manager	From 19/02/2024

Approval Delegations	From	To	Delegated To
Add a descriptive name for the rule here	07/10/2024 13:55	To 11/10/2024 17:00	Delegated To Lian Shaw

To cancel a rule, simply select the **Delete** button.

To amend a rule, make the changes to the fields that you wish to edit and then select the **Save** button to update the rule information.

The screenshot shows the 'Account Management' interface for Tracy Nevin. The 'Approval Delegations' section is visible, showing a form with fields for 'Rule Name', 'Start Date', 'End Date', 'Category', and 'Delegate To'. The 'Delete', 'Save', and 'Cancel' buttons are highlighted with green boxes.

Roles	From
SND Procurement Requester	From 12/09/2024
SND Next Gen Human Resource Help Desk User	From 19/02/2024
SND Employee	From 19/02/2024
SMBC Hiring Manager	From 19/02/2024
SMBC Line Manager	From 19/02/2024

Approval Delegations	From	To	Delegated To
Add a descriptive name for the rule here	07/10/2024 13:55	To 11/10/2024 17:00	Delegated To Lian Shaw

That brings this Quick Reference Guide to a close.