

This guide outlines the steps to follow to delegate your system role and access to another colleague so that your approvals can be processed in the event of your planned absence.



1. Navigate to Roles and Delegations



2. Select Role Delegations



3. Set the role delegation rules

01

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

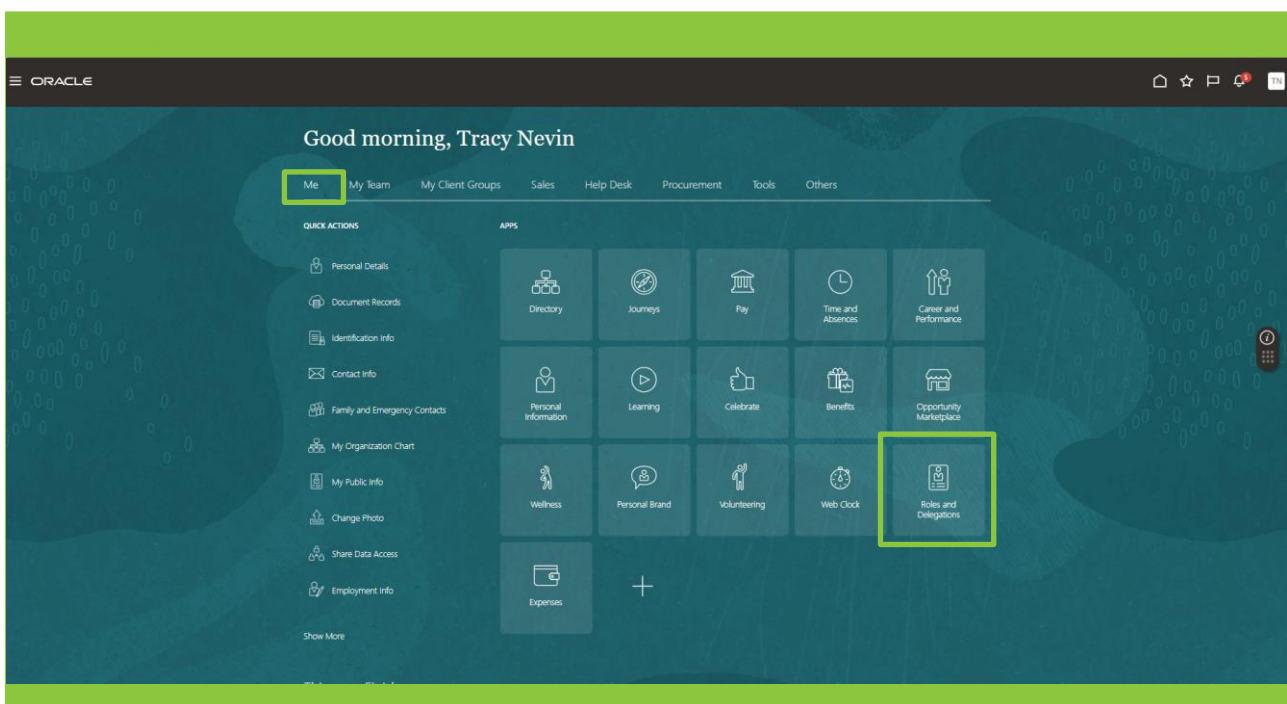
The in-system workflow will direct approval requests to the appropriate approver(s). For example, if a colleague raises a request to book annual leave, that request will be directed to their line manager for review and approval.

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 system role access to another user. This will enable a stand-in to act on your behalf and process all approvals.

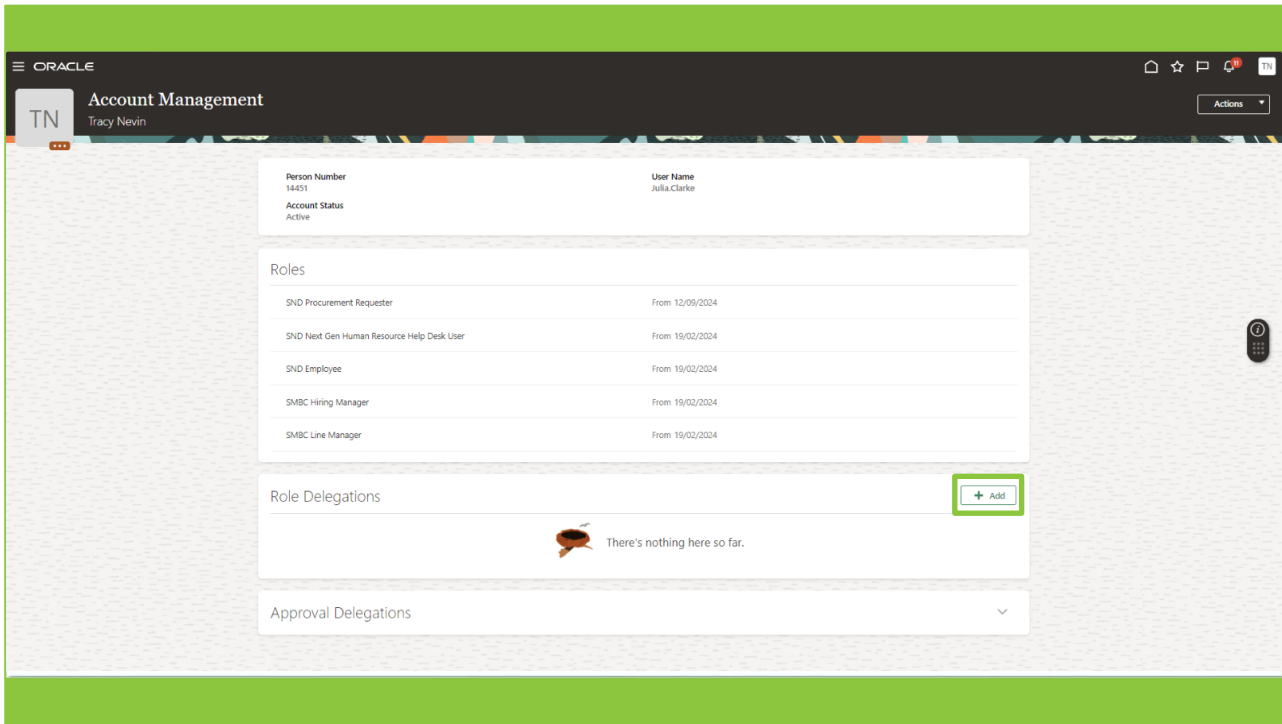
To delegate your role, from your Oracle Fusion homepage, navigate to the **Me** tab. Next select the **Roles and Delegations** application tile.



02

The **Account Management** page is displayed.

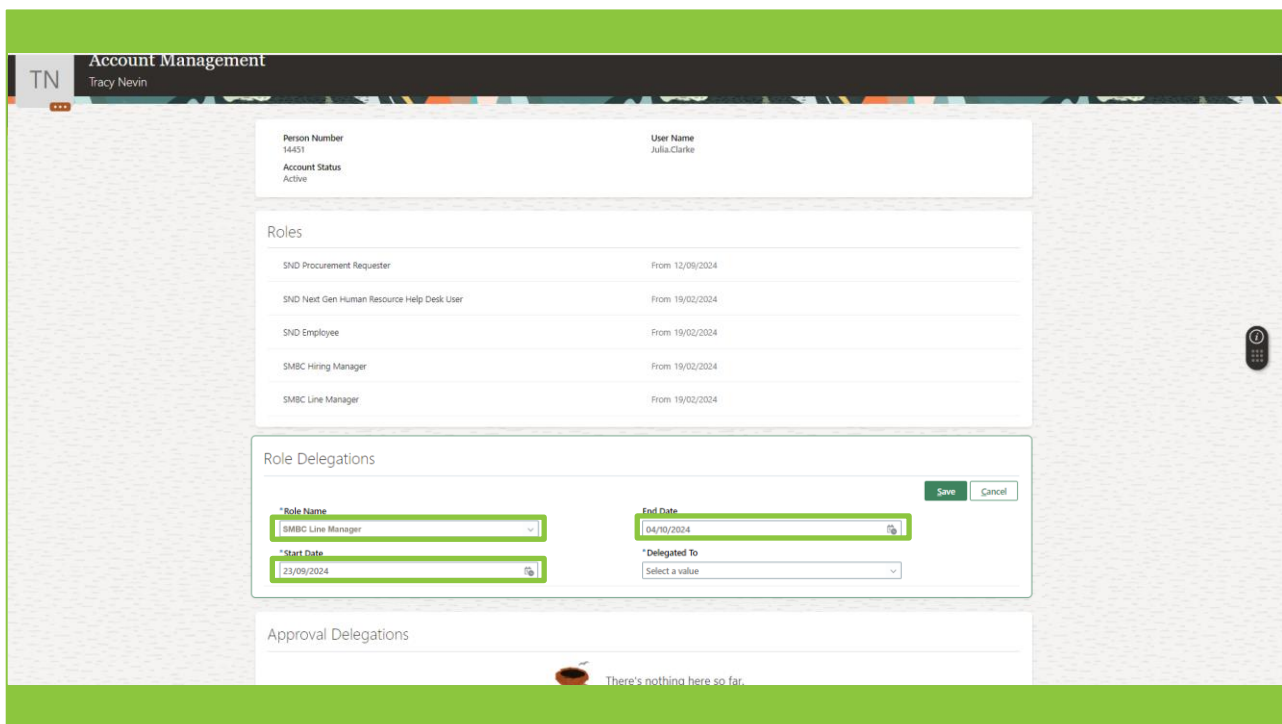
Navigate to the **Role Delegations** section and select the **Add** button.



03

The editable window opens. Select the **Role Name** field and choose the role that you wish to delegate from the drop-down options list.

Add a **Start Date** for when the role delegation will be effective from. If you know when you will be returning to work, you also have the option to add an **End Date** for the role delegation rule.



Type the name of the person that you wish to delegate your role to into the **Delegate to** field. Select the name of the person from the drop-down list.

Note - delegating the role enables the nominated individual to act on all approvals that relate to the system role that is being delegated. Additionally, when you delegate a role, you are not only passing access to your approvals to your nominated individual, but you are also passing full role access to them; meaning that they are able to transact as a line manager whilst the role delegation is in place.

For this reason, you should only delegate your role up your reporting line to a more senior colleague.

The screenshot shows the Oracle Account Management interface for user Tracy Nevin. The 'Role Delegations' section is active, with the following details:

- Role Name:** SMBC Line Manager
- Start Date:** 23/09/2024
- Delegated To:** Lian Shaw (selected from a dropdown list)

The dropdown list for 'Delegated To' contains the following entries:

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

Once all the fields have been completed, select the **Save** button and the role delegation will come into effect from your chosen start date.

The screenshot shows the Oracle Account Management interface for user Tracy Nevin. The 'Role Delegations' section is active, with the following details:

- Role Name:** SMBC Line Manager
- Start Date:** 23/09/2024
- End Date:** 04/10/2024
- Delegated To:** Lian Shaw

The 'Save' button is highlighted in green, indicating it is the next step to complete the delegation.

To edit or cancel a role delegation, firstly select the **Pencil icon**.

The screenshot shows the Oracle Account Management interface for user Tracy Nevin. It displays account details, a list of roles, and a table of role delegations. The 'Role Delegations' table has one entry for 'SMBC Line Manager' with a start date of 04/10/2024 and an end date of 25/10/2024, delegated to Lian Shaw. A green box highlights the pencil icon in the 'Actions' column for this delegation.

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

Role Delegations	Actions
SMBC Line Manager 04/10/2024 to 25/10/2024 Delegated to Lian Shaw	+ Add ✎

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

To amend a role delegation rule, edit the fields that you wish to change, and then select the **Save** button.

The screenshot shows the Oracle Account Management interface with the 'Role Delegations' section expanded into an edit form. The form contains fields for Role Name, End Date, Start Date, and Delegated To. The 'Delete', 'Save', and 'Cancel' buttons are visible at the top right of the form.

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

Role Name	End Date	Start Date	Delegated To	Actions
SMBC Line Manager	25/10/2024	04/10/2024	Lian Shaw	Delete Save Cancel

That brings this Quick Reference Guide to a close.