NFC Procedures

National Finance Center
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EmpowHR – Version 9.0 Section 9 – Manager Self Service

TITLE I
Payroll/Personnel Manual

CHAPTER 17
EmpowHR

SECTION 9
Management Self Service

Manager Self Service (MSS)

Manager Self Service provides managers with the tools and information they need to administer certain aspects pertaining to employees' professional development. It eliminates paperwork and provides managers with a method to track information on each employee. Managers are able to:

- Initiate a Personnel Action Request (PAR)
- Initiate a Fill a Position Request
- Request New Positions
- Manage PAR Requests
- Review Transactions
- Delegate Approvals

Managers may only perform personnel requests for their direct reports and their subordinates. Once a manager initiates a request, it passes through and approval workflow process that is specified by the Agency. Once the request is approved, it is submitted to the appropriate *EmpowHR* module for processing.

This section contains the following topics:

MSS Configuration

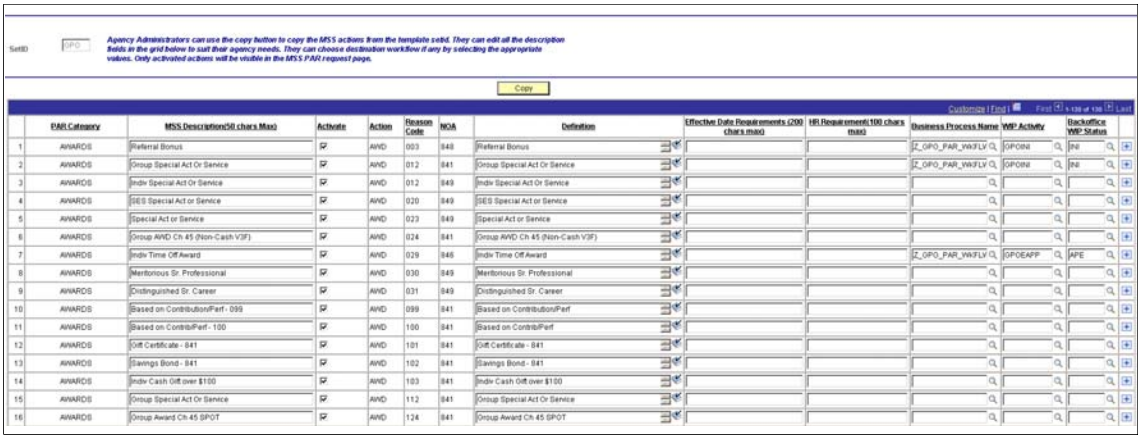
For PAR Requests, each agency will have a custom MSS Configuration page which identifies the types of requests a manager can perform, as well as the workflow and PAR status associated with the request. This template is the foundation for the MSS PAR request and must be established before any request can be made. Agency Administrators will have the ability to copy rows from a template provided by NFC, in order to create their own custom template. The Agency Administrator will have the ability to:

- Initiate the agency MSS Configuration template
- Activate and deactivate the types of requests which a manager can perform
- Customize the NOA request descriptions for their specific agency
- Select the point in which the request will enter the Human Resources (HR) processing workflow
- Select the backoffice WIP Status of the PAR action

To initiate the MSS Configuration template:

1. Select the ***EmpowHR Setup Tables (HD)*** menu group.

2. Select the ***MSS Configuration*** component. The MSS Configuration page (**Figure 1**) is displayed.



3. The field is displayed as follows:

SetID	This field is populated with the SetID associated with the UserID. If the user has access to multiple SetIDs, a look up icon will appear next to the SetID field.

Note: Before initializing, the template will be blank for the agency. The agency administrator will need to copy the actions from the NFC template. NFC will maintain the master template. Any actions that need to be added to the MSS Configuration template will be added to the NFC Template and will need to be copied by the agencies.

4. Click **Copy**.

5. Click **OK**. The Source SetID field appears.

6. Complete the field as follows:

Source SetID	The source setID is the template from which you are copying. Select **`TMPLT`** by clicking the search icon and selecting from the results. TMPLT is the NFC maintained master template. By selecting **`TMPLT`** the actions and all configuration defaults from the TMPLT will be populated on the Agency MSS Configuration page.

7. Complete the fields as follows:

PAR Category	This field identifies the type of action being performed by the manager in the MSS PAR Request.
MSS Description	This field identifies the action being performed by the manager in the MSS PAR Request.
Activate	Check this box to activate each applicable action. Before an action can be used, the administrator will need to activate it.
Action	This field displays the action being performed. This value will be displayed on the employee's PAR record in the HR Processing component once the record is created.

Reason Code	This field displays the reason code that relates to the action being performed. This value will be displayed on the employee's PAR record in the HR Processing component once the record is created.
NOA	This field displays the Nature of Action code that relates to the action being performed. This value will be displayed on the employee's PAR record in the HR Processing component once the record is created.
Definition	This field is populated with the definition of the action being performed.
Effective Date Requirements	This field is used to provide the manager assistance in determining the effective date of the action. This field is configurable by the agency.
HR Requirements	This field is the template setup field. The value in this column is not displayed on the MSS PAR Request page.
Business Process Name	This field displays the HR processing workflow that the transaction should follow. **Note:** It is critical that the agency administrator be familiar with the agencies' specific workflow.
WIP Activity	This field determines which step of the workflow the action is inserted. Enter the applicable WIP activity or select an activity by clicking the search icon. **Note:** By selecting **`Initiator`**, the approved MSS PAR request would be inserted after the Initiator role and be routed to the approver. By selecting **`Approver`**, the action would be routed to the Processor.
Backoffice WIP Status	This field is the PAR status of the action and is based on the role selected in the WIP Activity field.

Note: If the WIP Activity and Backoffice WIP Status fields are left blank, the HR Initiator will receive and email notification that a PAR action has been initiated. This will also be the case if the Business Process Name, WIP Activity and Backoffice WIP Stats fields are left blank.

8. Click **Save** to save the agency template.

Initiating PAR Requests

The Manager PAR Request allows managers to initiate certain personnel action requests for employees in their organization. Once the PAR is initiated, it is sent through the appropriate approval channels. Managers can review the approval status of a request through the ***Review Transactions*** component. For more information, see Reviewing Transactions.

Upon final approval, the PAR is sent to the Human Resources (HR) personnel for further processing. The point at which the request enters the HR workflow is determined by the Agency Administrator. Once the action has been processed by HR, the initiating manager will receive a notification that the transaction has been processed.

Note: The types of PAR actions available through the Manager PAR Request component are configured by each agency.

To initiate a PAR request:

1. Select the ***Manager Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Manager PAR Request*** component. The Manager PAR Request page (**Figure 1**) is displayed.

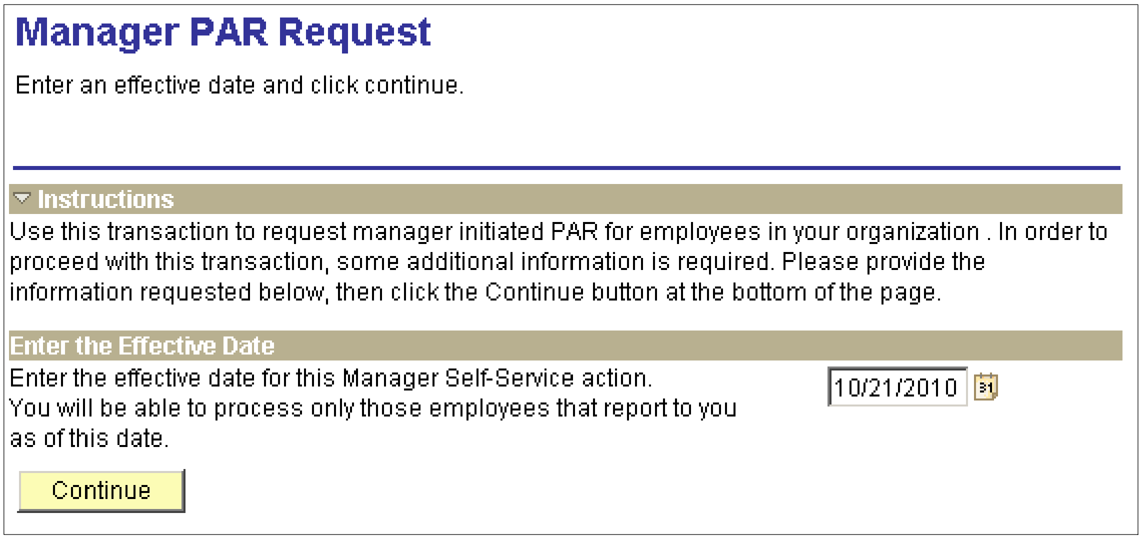
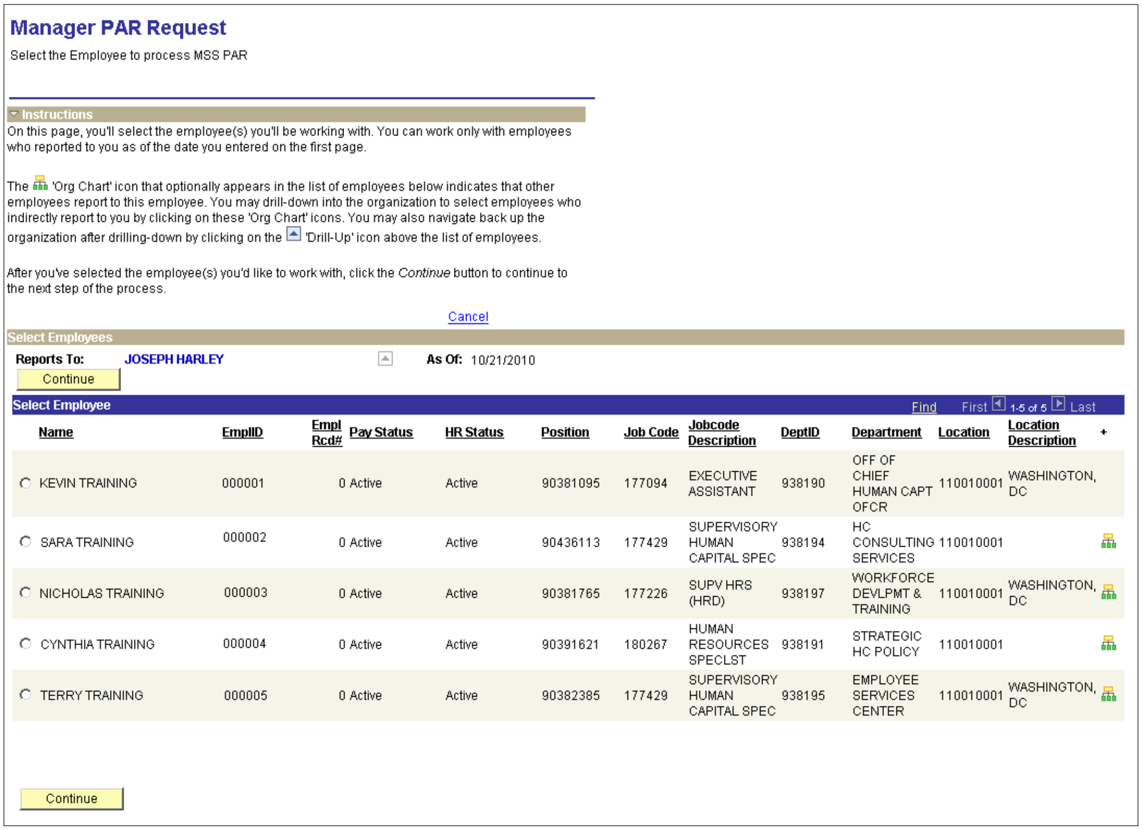


Figure 1. Manager PAR Request Page

4. Complete the field as follows:

Effective Date	Enter the effective date for the MSS action or select a date by clicking the calendar icon.

5. Click **Continue**. The Manager PAR Request Page (**Figure 2**)is displayed with a list of employees that report directly to the manager logged in.



Manager PAR Request

Select the Employee to process MSS PAR

Instructions

On this page, you'll select the employee(s) you'll be working with. You can work only with employees who reported to you as of the date you entered on the first page.

The 'Org Chart' icon that optionally appears in the list of employees below indicates that other employees report to this employee. You may drill-down into the organization to select employees who indirectly report to you by clicking on these 'Org Chart' icons. You may also navigate back up the organization after drilling-down by clicking on the 'Drill-Up' icon above the list of employees.

After you've selected the employee(s) you'd like to work with, click the *Continue* button to continue to the next step of the process.

Cancel

Select Employees

Reports To: JOSEPH HARLEY As Of: 10/21/2010

Continue

Select Employee — Find First 1-5 of 5 Last

Name	EmplID	Empl Rcd#	Pay Status	HR Status	Position	Job Code	Jobcode Description	DeptID	Department	Location	Location Description
KEVIN TRAINING	000001	0	Active	Active	90381095	177094	EXECUTIVE ASSISTANT	938190	OFF OF CHIEF HUMAN CAPT OFCR	110010001	WASHINGTON, DC
SARA TRAINING	000002	0	Active	Active	90436113	177429	SUPERVISORY HUMAN CAPITAL SPEC	938194	HC CONSULTING SERVICES	110010001	
NICHOLAS TRAINING	000003	0	Active	Active	90381765	177226	SUPV HRS (HRD)	938197	WORKFORCE DEVLPMT & TRAINING	110010001	WASHINGTON, DC
CYNTHIA TRAINING	000004	0	Active	Active	90391621	180267	HUMAN RESOURCES SPECLST	938191	STRATEGIC HC POLICY	110010001	
TERRY TRAINING	000005	0	Active	Active	90382385	177429	SUPERVISORY HUMAN CAPITAL SPEC	938195	EMPLOYEE SERVICES CENTER	110010001	WASHINGTON, DC

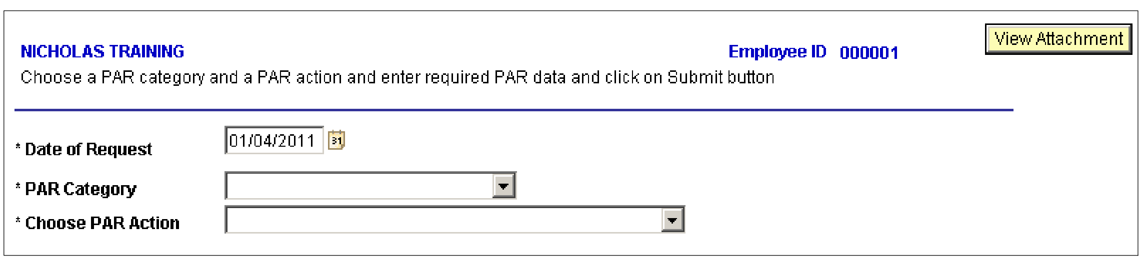
Continue

Figure 2. Manager PAR Request page with Employee List

6. Select an employee for whom the PAR request will be initiated.

   Note: The Organizational Chart icon, next to the name of a direct report, indicates the employee has other employee that report directly to him/her.

7. Click **Continue**. The PAR Category Selection page (**Figure 3**) is displayed.



NICHOLAS TRAINING Employee ID 000001 View Attachment

Choose a PAR category and a PAR action and enter required PAR data and click on Submit button

* Date of Request 01/04/2011

* PAR Category

* Choose PAR Action

Figure 3. PAR Category Selection page

8. Complete the fields as follows:

Date of Request	This field is populated with the date selected on the Manager PAR Request page (**Figure 1**)
PAR Category	Select the applicable PAR category from the drop-down list.
Choose PAR Action	Select the applicable PAR action from the drop-down list.

9. Depending on the PAR Category and the PAR Action selected, the required fields for that specific action will be displayed below the PAR Category and Action selections. Complete the required fields that appear.

10. Click **Submit**. A PAR request has been successfully initiated. The approval workflow for the PAR request will be displayed at the bottom of the page (**Figure 4**). At this point, the Initiator can add attachments to the request. For more information about adding attachments see the Adding Attachments section of this procedure. by clicking **Add Attachment** then browsing for and selecting the appropriate attachment

    Note: If the PAR request has a single approver, the approver's name will be displayed in the approver box. If the request has more than one approver, the approval box will display `Multiple Approvers`. The list of multiple approvers can be viewed by clicking the ***Multiple Approvers*** link.

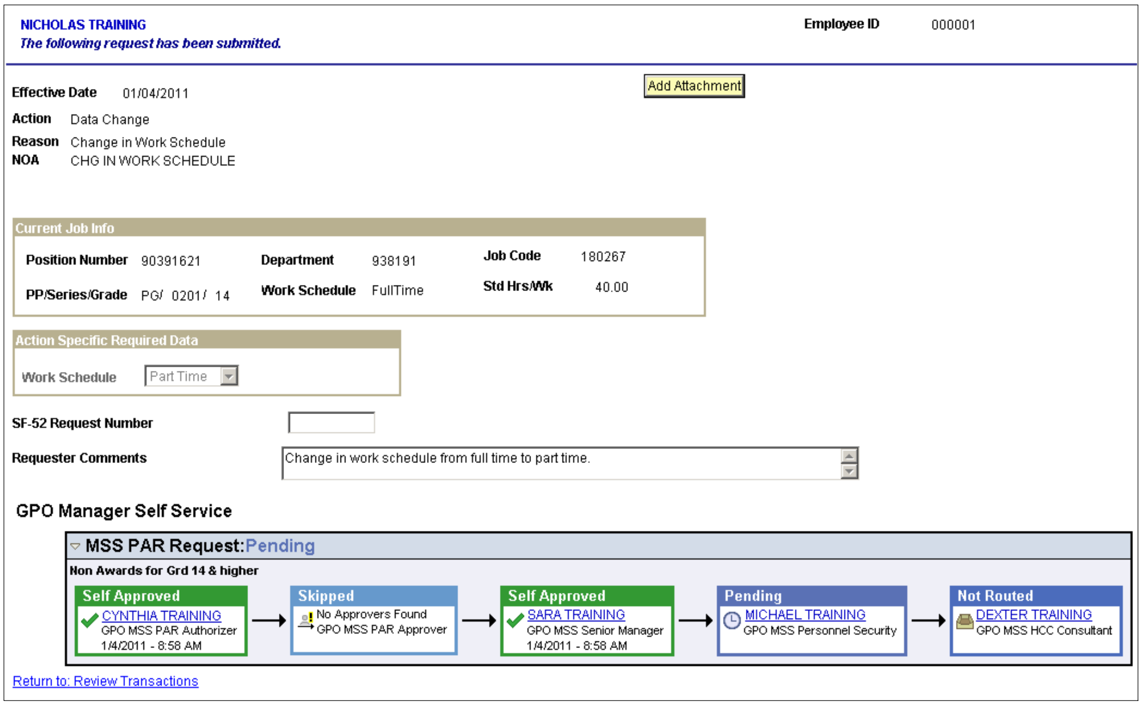


Figure 4. Submitted PAR Request with Approval Workflow

Adding an attachment to a PAR Request

Once a PAR has been successfully initiated, the Add Attachment button allows the Initiator to add attachments to the request.

To add an attachment:

1. Click **Add Attachment** on the PAR Request page. The MSS Attachments page (**Figure 5**) is displayed.

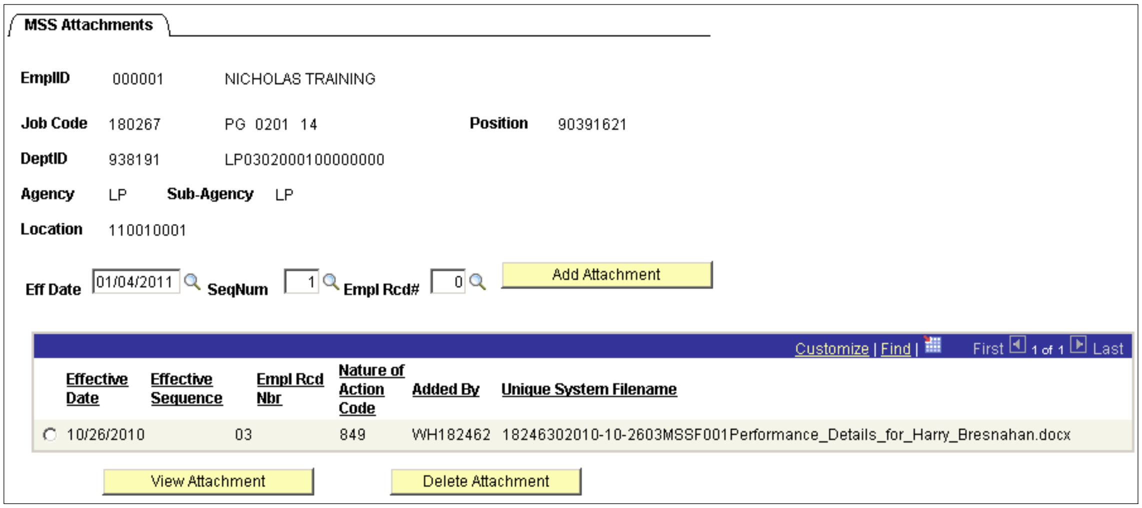


Figure 5. MSS Attachments page

2. Click **Add Attachment**.
3. Click **Browse** to browse the file directory.
4. Select the appropriate file from the file directory.
5. Click **Open**.
6. Click **Upload**.

   Note: The user can also view the current attachments by selecting the applicable attachment and clicking **View Attachment**. Attachments can only be deleted by the users who have uploaded the file or by a user who has an administrative role.

Approving/Denying a PAR Request

The request has been initiated and will now begin to go through the approval workflow. The approval workflow is determined by the agency and each workflow can be any number of steps. The initiator is not considered a part of the workflow; therefore the workflow begins with the first approver in the chain.

Each approver in the workflow will receive an email notification regarding a pending PAR. The approver can access the request by clicking the link provided in the email or through the ***Review Transactions*** component. For more information, see Approving/Denying Requests.

Processing a PAR Request

Once a PAR initiated in MSS has completed the approval workflow, it is sent to the HR personnel for processing. The MSS Agency Administrator determines which step in the HR Processing workflow the request will be inserted. The request will be displayed on the HR personnel's worklist and they should follow the normal HR processing workflow for their agency. For more information, see Section 5, PAR Processing of the *EmpowHR* procedure manual.

Filling a Position

The Fill a Position component allows managers create the following requests:

- **New** - Used to request a new position based on an existing Job Code. This request will automatically create a position record upon final approval.
- **Recertify** - Used to request a new position based on an existing position when minimal changes need to be made to the duties. This request will not automatically generate a position record upon final approval. The last approver in the approval workflow will be required to manually create the position record, or to notify the appropriate processor.
- **Update** - Used to request a new position based on an existing position when changes are required to the duties performed. This request will not automatically generate a position record upon final approval. The last approver in the approval workflow will be required to manually create the position record, or to notify the appropriate processor.

This section contains the following topics:

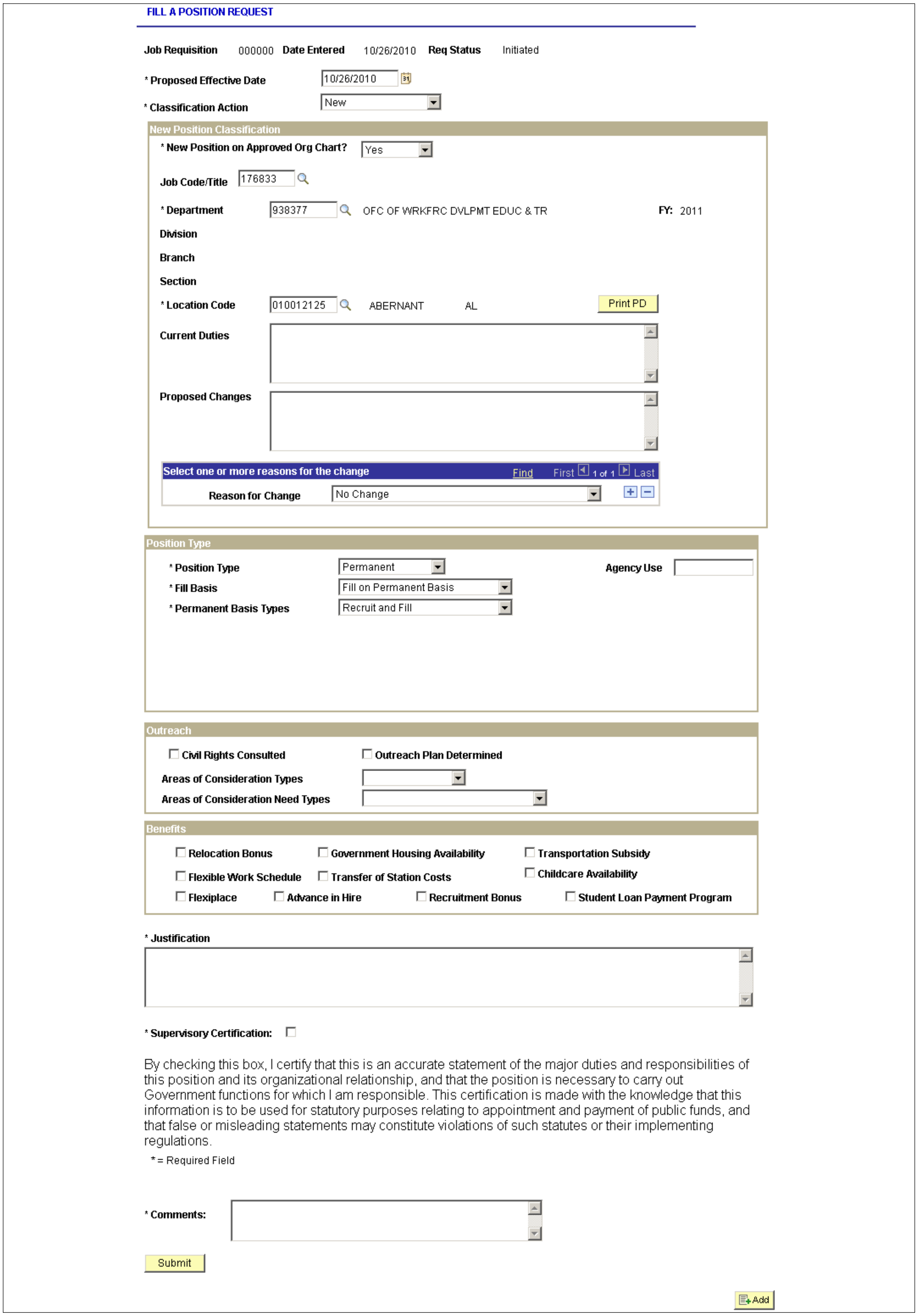
New Position

The Fill a New Position process enables managers to request a classification and complete recruit and fill information for a new position based on an existing job code. Once the request is completed and all approvals are obtained, the position will automatically be created in the *EmpowHR* Position Management module.

Note: When requesting a new position, a supporting Job Code must already exist. The manager is only requesting the creation of a new position with an existing job code.

To fill a new position:

1. Select the ***Manager Self Service*** menu group.
2. Select the ***Tasks*** menu.
3. Select the ***Fill a Position Request*** component. The Fill A Position Request page (**Figure 6**) is displayed.



FILL A POSITION REQUEST

Job Requisition 000000 Date Entered 10/26/2010 Req Status Initiated

* Proposed Effective Date 10/26/2010

* Classification Action New

New Position Classification

* New Position on Approved Org Chart? Yes

Job Code/Title 176833

* Department 938377 OFC OF WRKFRC DVLPMT EDUC & TR FY: 2011

Division

Branch

Section

* Location Code 010012125 ABERNANT AL Print PD

Current Duties

Proposed Changes

Select one or more reasons for the change Find First 1 of 1 Last

Reason for Change No Change

Position Type

* Position Type Permanent Agency Use

* Fill Basis Fill on Permanent Basis

* Permanent Basis Types Recruit and Fill

Outreach

Civil Rights Consulted Outreach Plan Determined

Areas of Consideration Types

Areas of Consideration Need Types

Benefits

Relocation Bonus Government Housing Availability Transportation Subsidy

Flexible Work Schedule Transfer of Station Costs Childcare Availability

Flexiplace Advance in Hire Recruitment Bonus Student Loan Payment Program

* Justification

* Supervisory Certification:

By checking this box, I certify that this is an accurate statement of the major duties and responsibilities of this position and its organizational relationship, and that the position is necessary to carry out Government functions for which I am responsible. This certification is made with the knowledge that this information is to be used for statutory purposes relating to appointment and payment of public funds, and that false or misleading statements may constitute violations of such statutes or their implementing regulations.

* = Required Field

* Comments:

Submit

Add

Figure 6. Fill A Position Request page

4. Complete the fields as follows:

Job Requisition	This field is populated with a unique identifier for this request. This number is generated when the request is submitted. This identifier will follow the request through the approval process.
Date Entered	This field is populated with the current date and reflect the date the request was created.
Req Status	This field is populated with the current status of the request.
***Proposed Effective Date**	Enter the date the new position is to be effective or select a date by clicking the calendar icon.
***Classification Action**	Select `New` from the drop-down list to fill a new position. The New Position Classification Section appears.
New Position Classification	
New Position on Approved Org Chart?	Select whether or not the new position is on an approved org chart. By selecting `Yes` the Job Code/Title and Create an Additional Identical fields appear. **Note:** The new position must be on an approved organizational chart to continue.
Job Code/Title	Enter the job code or select a code by clicking the search icon. After entering or selecting a job code, new fields appear. **Note:** If the Create an Additional Identical field is checked, this field is not required to be completed.
Create an Additional Identical	Check this box if this position is going to be created from an existing position. If this box is checked the manager will be required to enter the position number of the position that the new position will be created from but will not be required to enter the Job Code, Department or Location.
Department	Enter the department or select a department by clicking the search icon. The description of the department entered or selected appears to the right of the field.
FY	This field is populated with the current fiscal year.
Division	This field is populated based on the Department entered or selected.
Branch	This field is populated based on the Department entered or selected.
Section	This field is populated based on the Department entered or selected.
***Location Code**	Enter the location code or select a code by clicking the search icon. The description of the location code entered or selected appears to the right of the field.
Current Duties	This field is used to document updates to a position and are not required for a new position.
Proposed Changes	This field is used to document updates to a position and are not required for a new position.

Reason for Change	This field is intended for agencies using the ASPD function. When the manager requests a position be built from a specified ASPD, the Reason for Change field is used to justify any changes to the position other than what is established in the ASPD template. If using the ASPD function, select a reason for the change from the drop-down list.
Position Type	
***Position Type**	Select the position type from the drop-down list. The selection from this list will generate additional fields depending on the selection made.
Agency Use	This field is a free form field.
***Fill Basis**	Select the basis on which this position should be filled from the drop-down list. The selection from this list will generate additional fields depending on the selection made.
Outreach	
Civil Rights Consulted	Check this box if applicable.
Outreach Plan Determined	Check this box if applicable.
Areas of Consideration Types	Select the areas in which candidates may be considered from the drop-down list.
Areas of Consideration Need Types	Select the areas of consideration need types from the drop-down list.
Benefits	
Relocation Bonus	Check this box if a relocation bonus is available for this position.
Government Housing Availability	Check this box if government housing is available for this position.
Transportation Subsidy	Check this box if transportation subsidy is available for this position.
Flexible Work Schedule	Check this box if a flexible work schedule is available for this position.
Transfer of Station Costs	Check this box if transfer of station costs is available for this position.
Childcare Availability	Check this box if childcare is available for this position.
Flexiplace	Check this box if flexiplace is available for this position.
Advance in Hire	Check this box if an advance in hire is available for this position.
Recruitment Bonus	Check this box if a recruitment bonus is available for this position.
Student Loan Payment Program	Check this box if the student loan payment program is available for this position.
***Justification**	Enter the justification details for the reason the position is being created.

***Supervisory Certification**	Check this box to acknowledge that as the requestor/initiator the information provided is to the best of their knowledge and that they understand the consequences for supplying false or misleading information.
***Comments**	Enter any additional details relevant to the position to be viewed by the approvers and processors.

5. Click **Print PD** to create a PDF version of the Position Description based on the information entered in the request.

6. Click **Submit** to submit the new position for approval and processing. A pop up message will be displayed to notify the manager that the request has been submitted. The Fill A Position Status page (**Figure 7**) is displayed with the approval workflow at the bottom.

   Note: If the request has a single approver, the approver's name will be displayed in the approver box. If the request has more than one approver, the approval box will display **`Multiple Approvers`**. The list of multiple approvers can be viewed by clicking the ***Multiple Approvers*** link.

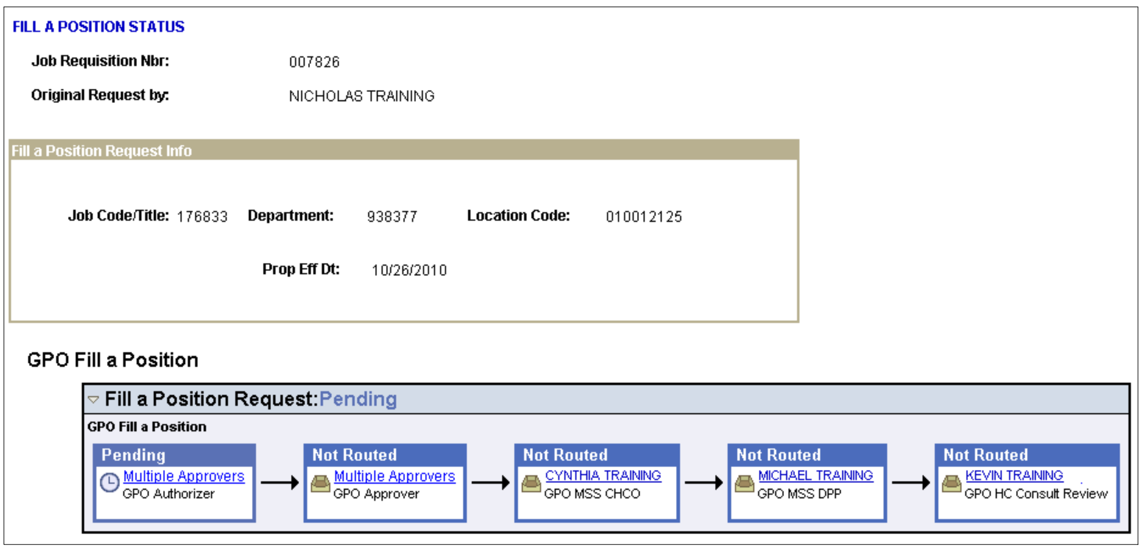


Figure 7. Fill A Position Status page

Recertify/Update a Position

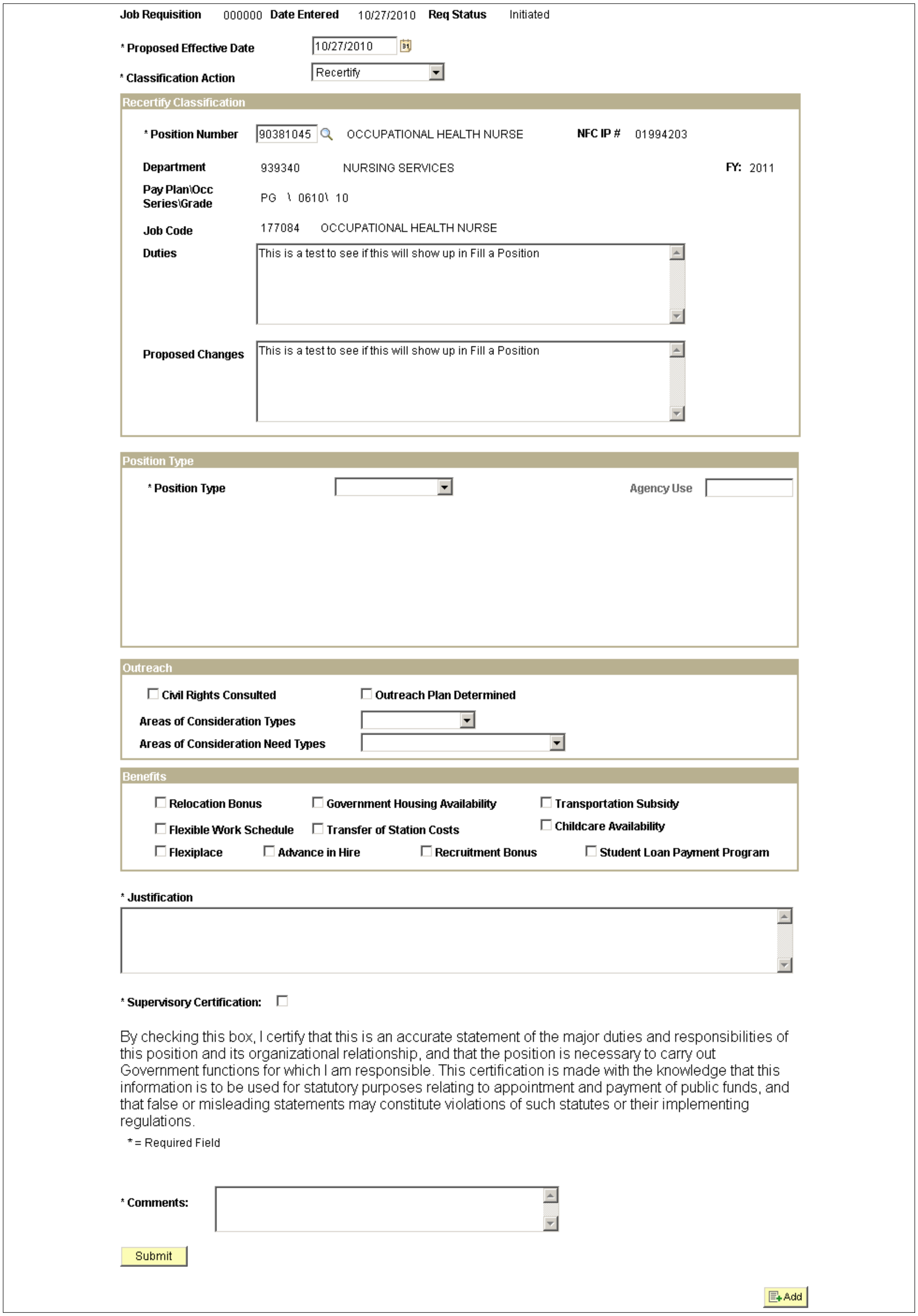
The Recertify a Position process enables managers to validate whether a position is still available to be filled. The Update a Position process enables managers to submit updates to a position. Unlike the Fill a New Position process, recertifications and updates will not automatically update the Position Management module. The final approver is required to process the recertification or update request manually.

To recertify or update a position:

1. Select the ***Manager Self Service*** menu group.

2. Select the ***Tasks*** menu.

3. Select the ***Fill a Position Request*** component. The Fill A Position Request page (**Figure 8**) is displayed.


Job Requisition 000000 Date Entered 10/27/2010 Req Status Initiated

* Proposed Effective Date 10/27/2010

* Classification Action Recertify

Recertify Classification

* Position Number 90381045 OCCUPATIONAL HEALTH NURSE NFC IP # 01994203

Department 939340 NURSING SERVICES FY: 2011

Pay Plan\Occ Series\Grade PG \ 0610\ 10

Job Code 177084 OCCUPATIONAL HEALTH NURSE

Duties: This is a test to see if this will show up in Fill a Position

Proposed Changes: This is a test to see if this will show up in Fill a Position

Position Type

* Position Type

Agency Use

Outreach

Civil Rights Consulted

Outreach Plan Determined

Areas of Consideration Types

Areas of Consideration Need Types

Benefits

Relocation Bonus

Government Housing Availability

Transportation Subsidy

Flexible Work Schedule

Transfer of Station Costs

Childcare Availability

Flexiplace

Advance in Hire

Recruitment Bonus

Student Loan Payment Program

* Justification

* Supervisory Certification:

By checking this box, I certify that this is an accurate statement of the major duties and responsibilities of this position and its organizational relationship, and that the position is necessary to carry out Government functions for which I am responsible. This certification is made with the knowledge that this information is to be used for statutory purposes relating to appointment and payment of public funds, and that false or misleading statements may constitute violations of such statutes or their implementing regulations.

* = Required Field

* Comments:

Submit

Add

Figure 8. Fill A Position Request page

4. Complete the fields as follows:

Job Requisition	This field is populated with a unique identifier for this request.
Date Entered	This field is populated with the current date.
Req Status	This field is populated with the current status of the transaction.
***Proposed Effective Date**	Enter the date the new position is to be effective or select a date by clicking the calendar icon.
***Classification Action**	Select **`Update`** from the drop-down list to update a position. The Update/Re-Describe Classification Section appears. **OR** Select **`Recertify`** from the drop-down list to recertify a position. The Recertify Classification Section appears.
Update/Re-Describe Classification - Displayed only if `Udate` is selected from the Classification Action Drop-down list.	
***Position Number**	Enter the position number or select a number by clicking the search icon. The description of the position number entered or selected will appear to the right of the field.
NFC IP #	This field is populated based on the position number entered or selected.
FY	This field is populated with the current fiscal year.
Department	This field is populated based on the position number entered or selected.
Last Promotion Date	This field is populated based on the position number entered or selected.
Pay Plan/Occ Series/Grade	This field is populated based on the position number entered or selected.
Position audit Decision Date	This field is populated based on the position number entered or selected.
Job Code	This field is populated based on the position number entered or selected.
Position Entry Date	This field is populated based on the position number entered or selected.
Proposed Title	Enter the new title of the position.
Current Duties	This field is populated based on the position number entered or selected.
Proposed Changes	Enter the changes to the position
Recertify Classification - Displayed only if `Recertify` is selected from the Classification Action Drop-down list.	
***Position Number**	Enter the position number or select a number by clicking the search icon. The description of the position number entered or selected will appear to the right of the field.
NFC IP #	This field is populated based on the position number entered or selected.

Department	This field is populated based on the position number entered or selected.
Pay Plan/Occ Series/Grade	This field is populated based on the position number entered or selected.
Job Code	This field is populated based on the position number entered or selected.
Duties	This field is populated based on the position number entered or selected.
Proposed Changes	Enter the changes to the position
Position Type	
***Position Type**	Select the position type from the drop-down list. The selection from this list will generate additional fields depending on the selection made.
Agency Use	This field is for agency use only.
***Fill Basis**	Select the basis on which this position should be filled from the drop-down list. The selection from this list will generate additional fields depending on the selection made.
Outreach	
Civil Rights Consulted	Check this box if applicable.
Outreach Plan Determined	Check this box if applicable.
Areas of Consideration Types	Select the areas in which candidates may be considered from the drop-down list.
Areas of Consideration Need Types	Select the areas of consideration need types from the drop-down list.
Benefits	
Relocation Bonus	Check this box if a relocation bonus is available for this position.
Government Housing Availability	Check this box if government housing is available for this position.
Transportation Subsidy	Check this box if transportation subsidy is available for this position.
Flexible Work Schedule	Check this box if a flexible work schedule is available for this position.
Transfer of Station Costs	Check this box if transfer of station costs is available for this position.
Childcare Availability	Check this box if childcare is available for this position.
Flexiplace	Check this box if flexiplace is available for this position.
Advance in Hire	Check this box if an advance in hire is available for this position.
Recruitment Bonus	Check this box if a recruitment bonus is available for this position.

Student Loan Payment Program	Check this box if the student loan payment program is available for this position.
***Justification**	Enter the justification details for the reason the position is being created.
***Supervisory Certification**	Check this box to acknowledge that as the requestor/initiator the information provided is to the best of their knowledge and that they understand the consequences for supplying false or misleading information.
***Comments**	Enter any additional details relevant to the position to be viewed by the approvers and processors.

5. Click **Submit** to submit the recertification/update position request for approval and processing. The Fill A Position Status page (**Figure 7**) is displayed with the approval workflow at the bottom.

   Note: If the request has a single approver, the approver's name will be displayed in the approver box. If the request has more than one approver, the approval box will display `Multiple Approvers`. The list of multiple approvers can be viewed by clicking the ***Multiple Approvers*** link.

Approving/Denying a Fill A Position Request

The request has been initiated and will now begin to go through the approval workflow. The approval workflow is determined by the agency and each workflow can be any number of steps. The initiator is not considered a part of the workflow; therefore the workflow begins with the first approver in the chain.

Each approver in the workflow will receive an email notification regarding a pending PAR. The approver can access the request by clicking the link provided in the email or through the ***Review Transactions*** component. For more information, see Approving/Denying Requests.

Processing a New Position Request

Once a Fill a Position request reaches its last approver, it is the responsibility of the last approver to ensure that the position is processed.

If the request has an action of `New`, the position record will automatically be in an `Approved` status once the last approver clicks **Approve**. When the **Approve** button is clicked, the approver is redirected to the Position Management page which contains the information from the new position. The The final approver must enter the remaining required fields for the position. Upon saving, the position is created and sent to NFC for processing. The position will reflect an `NFC Ready` status.

If the request has an action of `Recertify` or `Update`, the position record will not automatically be created. It is the responsibility of the final approver to manually create the position record, or to notify the appropriate processor.

Review Transactions

Once a request is initiated by the manager, it must go through an approval workflow. The approval workflow is determined by the agency. Since the initiator - manager who initiates the request - is not considered a part of the workflow, the workflow begins with the first approver in the chain. The first approver in the chain has the option to approve or deny the transaction. Approving the request will move the request forward to the next approver in the workflow. Denying the request will cancel the request and all remaining approval workflow. The initiator will receive an email indicating that the request has been denied. The approval workflow also allows approvers to Pushback a request. The Pushback action will "push" the request back to the previous approver. The request will remain active and once reviewed and approved again, it will continue through the approval workflow process. The first approver in the workflow chain will not have the option to Pushback a request. Since the first approver is the initial step in the approval workflow, there is no person to "push" the request back to. If the request needs to be returned to the initiator, it should be denied with the reason documented in the comments. The initiator will then be required to submit a new request.

Once the request enters the approval workflow, no changes can be made to it. However, each approver is required to enter their comments. These comments are workflow related and will not be displayed outside of the approval workflow.

This section contains the following topics:

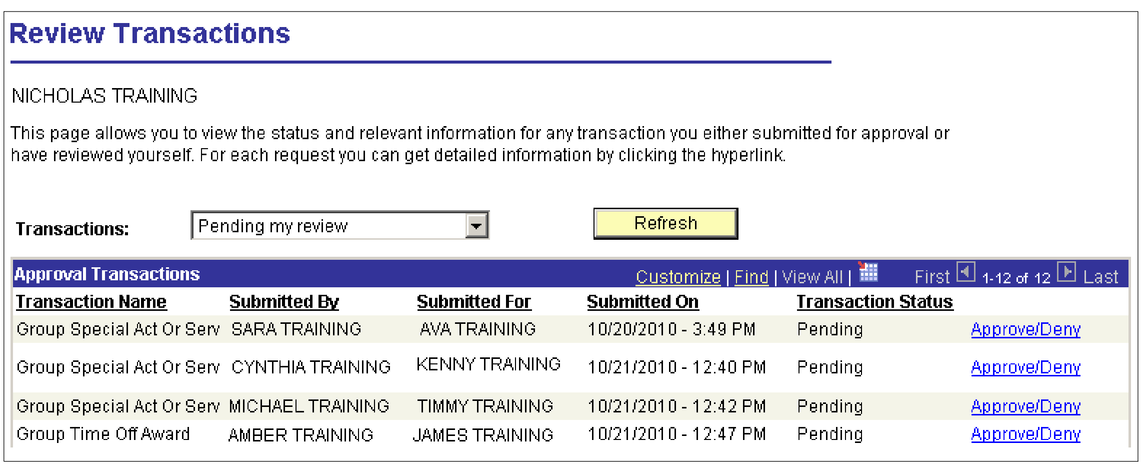
Approving/Denying Requests

Once a request is initiated it must go through the approval workflow. The approval workflow is determined by the agency and each workflow can be any number of steps. The initiator is not considered a part of the workflow; therefore the workflow begins with the first approver in the chain.

Each approver in the workflow will receive an email notification regarding a pending PAR. The approver can access the request by clicking the link provided in the email or through the ***Review Transactions*** component.

To approve/deny transactions:

1. Select the ***Manager Self Service*** menu group.
2. Select the ***Review Transactions*** component. The Review Transactions page (**Figure 9**) is displayed with the approvers' transactions that are pending the managers' review.



Review Transactions

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This page allows you to view the status and relevant information for any transaction you either submitted for approval or have reviewed yourself. For each request you can get detailed information by clicking the hyperlink.

Transactions: Pending my review   Refresh

Approval Transactions   Customize | Find | View All | First 1-12 of 12 Last

Transaction Name	Submitted By	Submitted For	Submitted On	Transaction Status	
Group Special Act Or Serv	SARA TRAINING	AVA TRAINING	10/20/2010 - 3:49 PM	Pending	Approve/Deny
Group Special Act Or Serv	CYNTHIA TRAINING	KENNY TRAINING	10/21/2010 - 12:40 PM	Pending	Approve/Deny
Group Special Act Or Serv	MICHAEL TRAINING	TIMMY TRAINING	10/21/2010 - 12:42 PM	Pending	Approve/Deny
Group Time Off Award	AMBER TRAINING	JAMES TRAINING	10/21/2010 - 12:47 PM	Pending	Approve/Deny

Figure 9. Review Transactions page

3. Click the ***Approve/Deny*** link next to the applicable transaction. The transaction is displayed with the approval workflow options at the bottom (**Figure 10**).

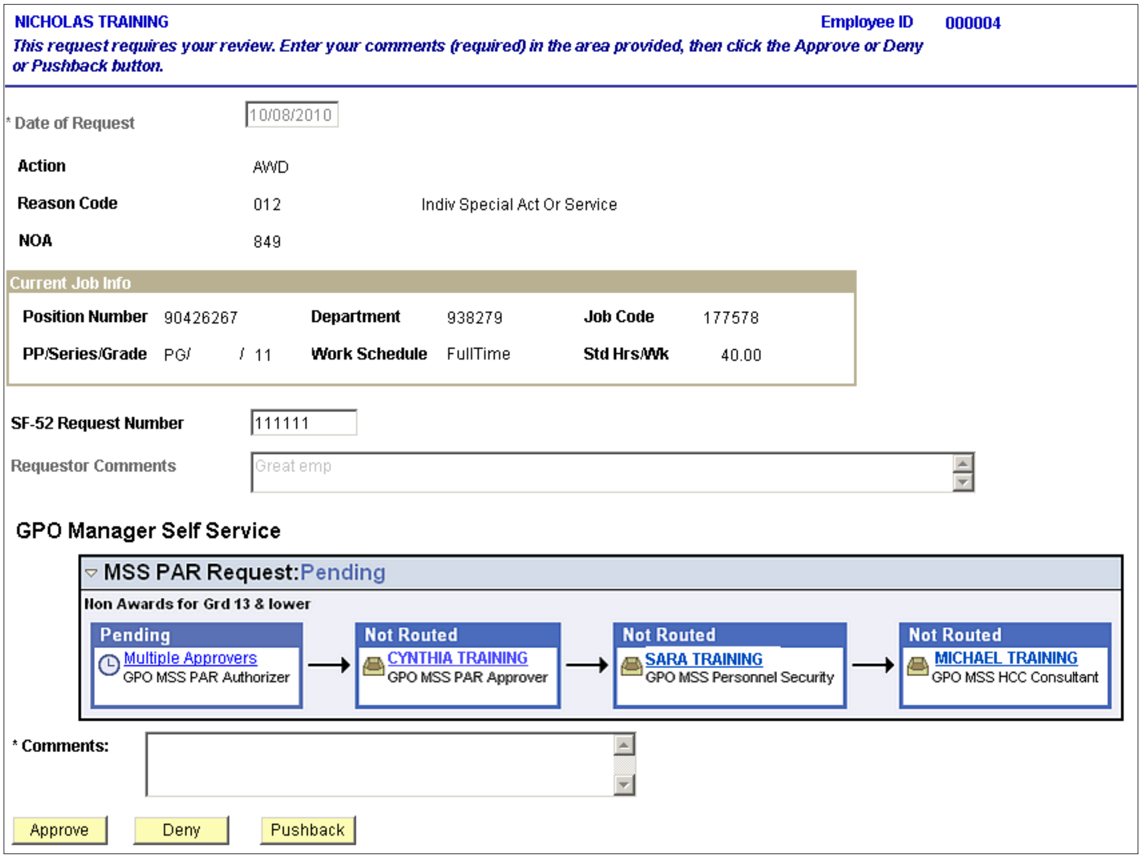


Figure 10. Transaction with Approval Workflow Options

4. Complete the field as follows:

Comments	Enter the applicable comments that pertain to the action being taken on the transaction. **Note:** Each approver in the workflow is required to enter comments before the transaction can moved forward through the approval process.

5. At this point, the following options are available:

Step	Description
Click **Approve**	To approve the transaction and forward it to the next step in the approval workflow.
Click **Deny**	To cancel the transaction and all remaining approval workflow steps.
Click **Pushback**	To “push” a transaction back to the previous approver for further review and approval. **Note:** The first approver in the workflow chain will not have the option to pushback a transaction since the first approver is the initial step in the workflow and there is no person to “push” the transaction back to.

Reviewing Transactions

To review transactions:

1. Select the ***Manager Self Service*** menu group.
2. Select the ***Review Transactions*** component. The Review Transactions page (**Figure 9**) is displayed with the approvers' transactions that are pending review.
3. At this point the following options are available:

Sept	Description
Select **`All`** from the Transaction drop-down list.	To display a list of all approval transactions.
Select **`I have approved`** from the Transaction drop-down list.	To display a list of all approved transactions.
Select **`I have denied`** from the Transaction drop-down list.	To display a list of all denied transactions.
Select **`I have submitted`** from the Transaction drop-down list.	To display a list of all submitted transactions.
Select **`Pending my review`** from the Transaction drop-down list.	To display a list of all transactions pending the manager's review.

4. Click **Refresh** to display the applicable information on the Review Transactions page (**Figure 9**).
5. Click the ***View details*** link next to the applicable transaction to view the request and its workflow.

Delegation

Delegation is when a person authorizes another to serve as his or her representative for a particular task of responsibility. The Manage Delegation component allows managers or approvers to authorize other users to perform managerial tasks on their behalf by delegating the authority to initiate or approve managerial transactions.

Delegation of authority to perform managerial transactions is usually prompted by one of these scenarios:

- A manager takes leave and wants to delegate authority or managerial transactions to another person while away from the office.
- A senior executive wants to delegate this authority to another person, such as an assistant.

The following terms are important to the understanding of the Delegation feature.

Term	Description
Delegation	The act of delegating one's authority to another user.
Delegator	A person that delegates authority to another user.

Term	Description
Proxy	A person granted authority to act on behalf of another user.
Delegate Initiation	Delegation Framework allows the user to separate the tasks of initiating a transaction from approving the same transaction on someone’s behalf. Delegator may delegate authority for a proxy to only initiate or submit a transaction on the delegator’s behalf.
Delegate Approvals	Delegation Framework allows the user to separate the task of initiating a transaction from approving the same transaction on someone’s behalf. Delegator may delegate authority for a proxy to only approve or deny a transaction on the delegator’s behalf.
Delegate Authority	The rights and privileges that are delegated from the delegator to the proxy.
Delegation Request	A request from the delegator to the proxy to task on delegated authority.
Delegation Period	The time range in which the delegated authority is in effect.
Delegation Administrator	When a delegator or delegation administrator withdraws delegation authority.
Revoke	When a delegator or delegation administrator withdraws delegated authority.

When a delegator/manager creates a delegation request, that delegator/manager can select a proxy from the list of direct reports and their subordinates or search for an individual. Although the delegator/manager can search for an individual, the search does not specify which employees have access to *EmpowHR*. It is the delegator/manager’s responsibility to ensure that the proxy selected has the appropriate access in *EmpowHR* to perform the delegated tasks. After the delegator/manager creates the delegation request, the proxy is notified and has the ability to accept or deny the request. Once the proxy accepts the delegation request, he/she is immediately and automatically assigned the necessary roles and permissions to perform the delegated tasks.

If the delegator delegates the ability to initiate requests to the proxy, both the delegator and the accepted proxy will be able to initiate requests.

Delegation can be for any period of time whether fixed or indefinite. Once assigned a delegation, it can only be revoked two ways.

- Specified Time Period - a nightly batch process, which will run after 12:01 am, will review to revoke any expired delegation requests.
- Manually Revoke a Delegation - This revocation will immediately remove the roles and permissions from the proxy and restore the delegators responsibilities.

The Delegation framework supports the following types of delegation:

- Downward delegation of authority to a direct “reports to” or another person lower down in the reporting hierarchy.
- Upward delegation of authority to a manager or another person higher up in the reporting hierarchy.
- Lateral delegation of authority to a peer within the same division or in a different division within the reporting hierarchy.

Users can create delegation requests for selected transaction through Manager Self Service pages.

When creating a delegation request, the delegator can:

- Delegate only the transaction to which they have access. For example, an employee who is not a manager, does not have access to manager self service transactions and, therefore, cannot delegate manager-specific transactions.

- Delegate to only one proxy per delegation period per transaction.
- Delegate all transactions to a single proxy, or delegate different transaction to different proxies.

This section contains the following topics:

Assign Delegation Approvals

To assign a delegation:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Manage Delegation*** component. The Manage Delegation page (**Figure 11**) is displayed.

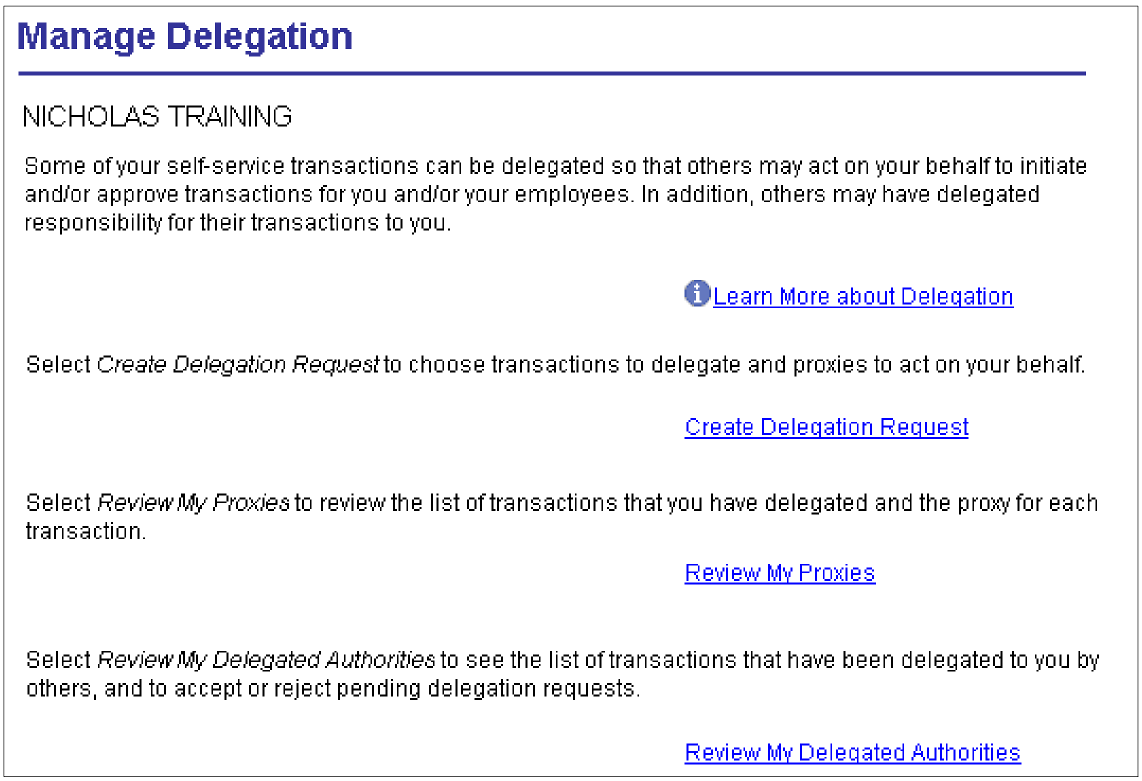


Figure 11. Manage Delegation page

3. Click the ***Create Delegation Request*** link. The Create Delegation Request - Enter Dates page (**Figure 12**) is displayed.

Figure 12. Create Delegation Request - Enter Dates page

4. Complete the fields as follows:

Delegation Dates	
From Date	Enter the date on which the delegation will begin or select a date by clicking the calendar icon.
To Date	Enter the date on which the delegation will end or select a date by clicking the calendar icon.

5. Click **Next**. The Create Delegation Request - Select Transactions page (**Figure 13**) is displayed.

OR

Click **Cancel** to cancel the action and return to the Manage Delegation page (**Figure 11**).

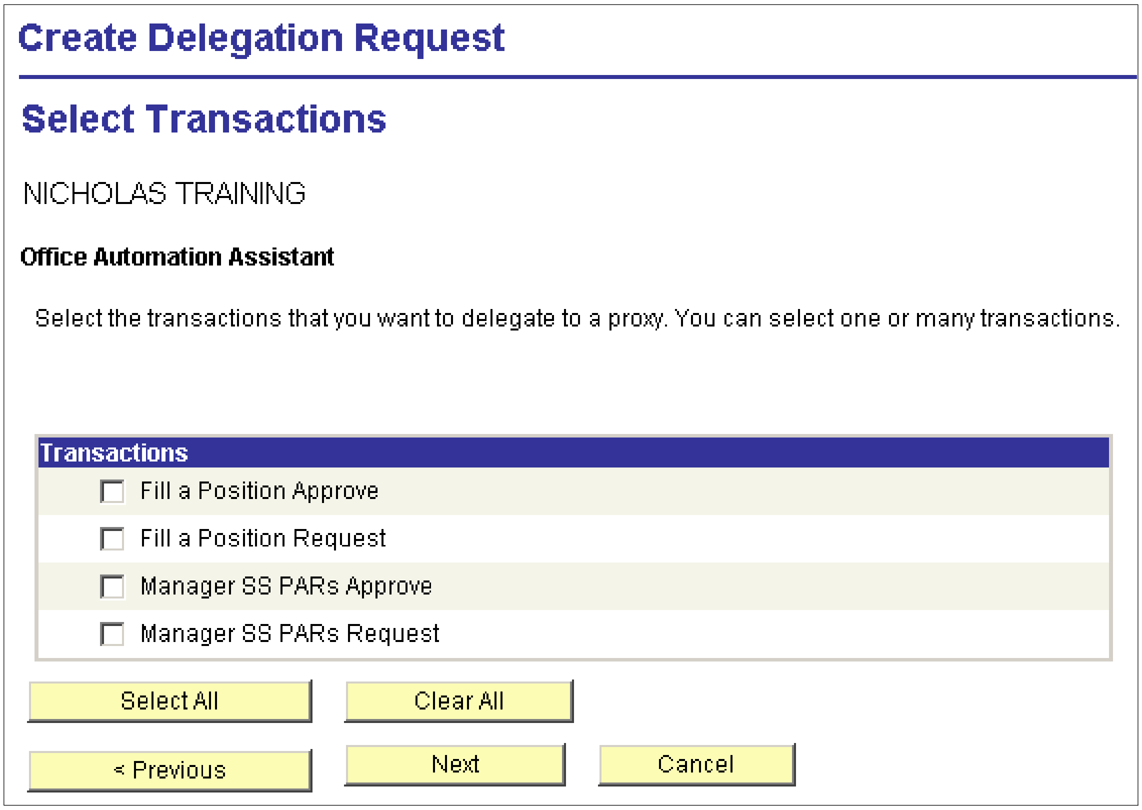


Figure 13. Create Delegation Request - Select Transactions page

6. At this point the following options are available:

Step	Description
Select transactions	Select each transaction to be included in the delegation request.
Click **Select All**	To select all transactions.
Click **Clear All**	To deselect all transaction types.

7. Click **Next**. The Create Delegation Request - Select Proxy by Hierarchy page (**Figure 14**) is displayed.

OR

Click **Previous** to return to the Create Delegation Request - Enter Dates page (**Figure 12**).

OR

Click **Cancel** to cancel the action and return to the Manage Delegation page (**Figure 11**).

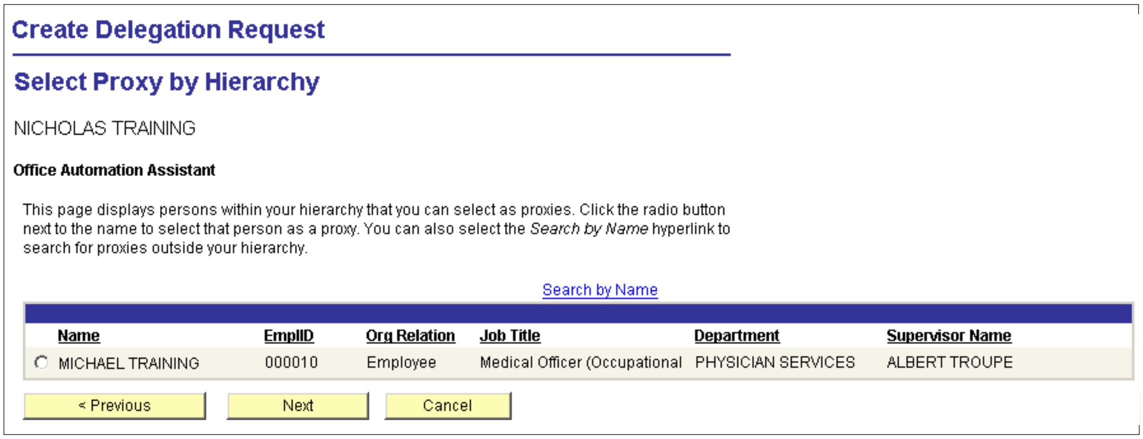


Figure 14. Create Delegation Request - Select Proxy by Hierarchy page

8. Select the applicable proxy to assign delegation authority to.

9. Click **Next**. The Create Delegation Request - Delegation Detail page (**Figure 15**) is displayed.

OR

Click **Previous** to return to the Create Delegation Request - Select Transactions page (**Figure 13**).

OR

Click **Cancel** to cancel the action and return to the Manage Delegation page (**Figure 11**).

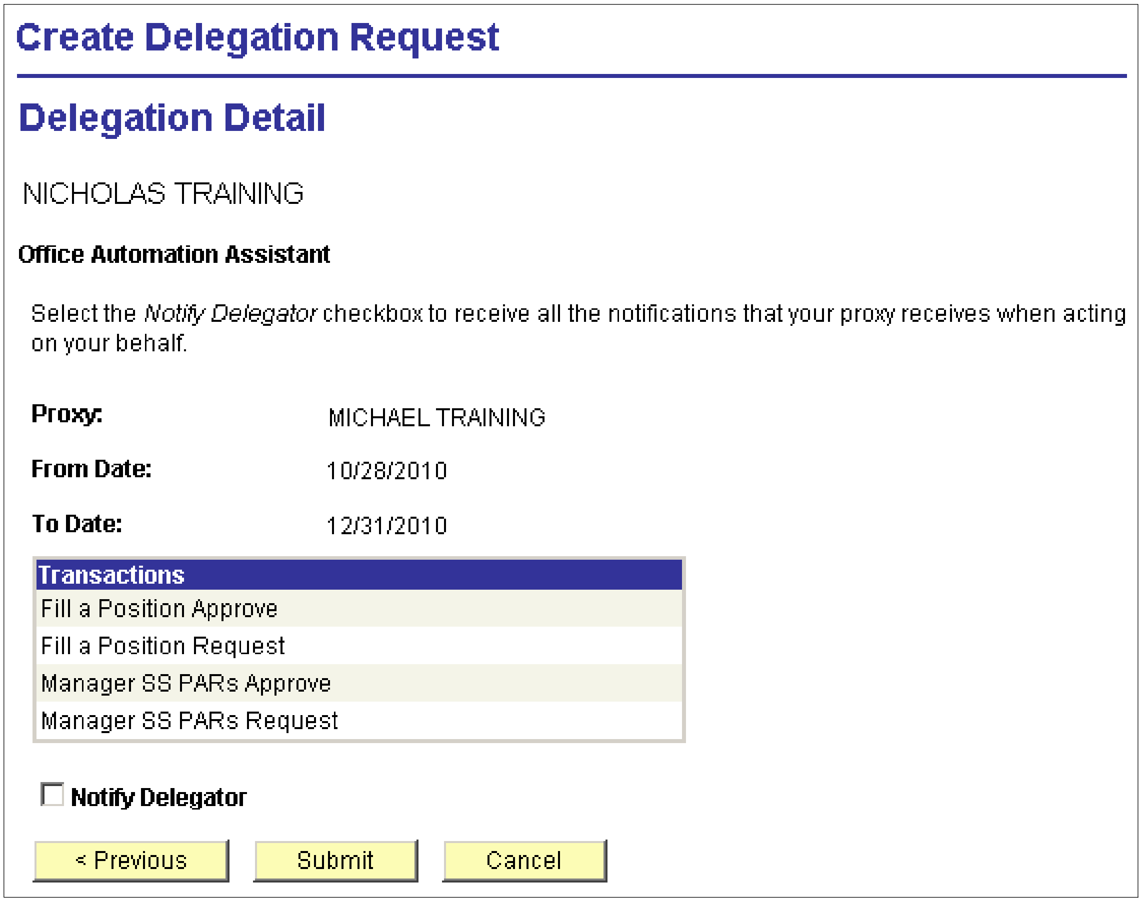


Figure 15. Create Delegation Request - Delegation Detail page

10. Verify the delegation request.

11. Complete the field as follows:

Notify Delegator	Check this box to send a copy of the delegated requests to the delegator/manager.

12. Click **Submit**. The Create Delegation Request - Confirmation page (**Figure 16**) is displayed.

OR

Click **Previous** to return to the Create Delegation Request - Select Proxy by Hierarchy page (**Figure 14**).

OR

Click **Cancel** to cancel the action and return to the Manage Delegation page (**Figure 11**).

Create Delegation Request

NICHOLAS TRAINING

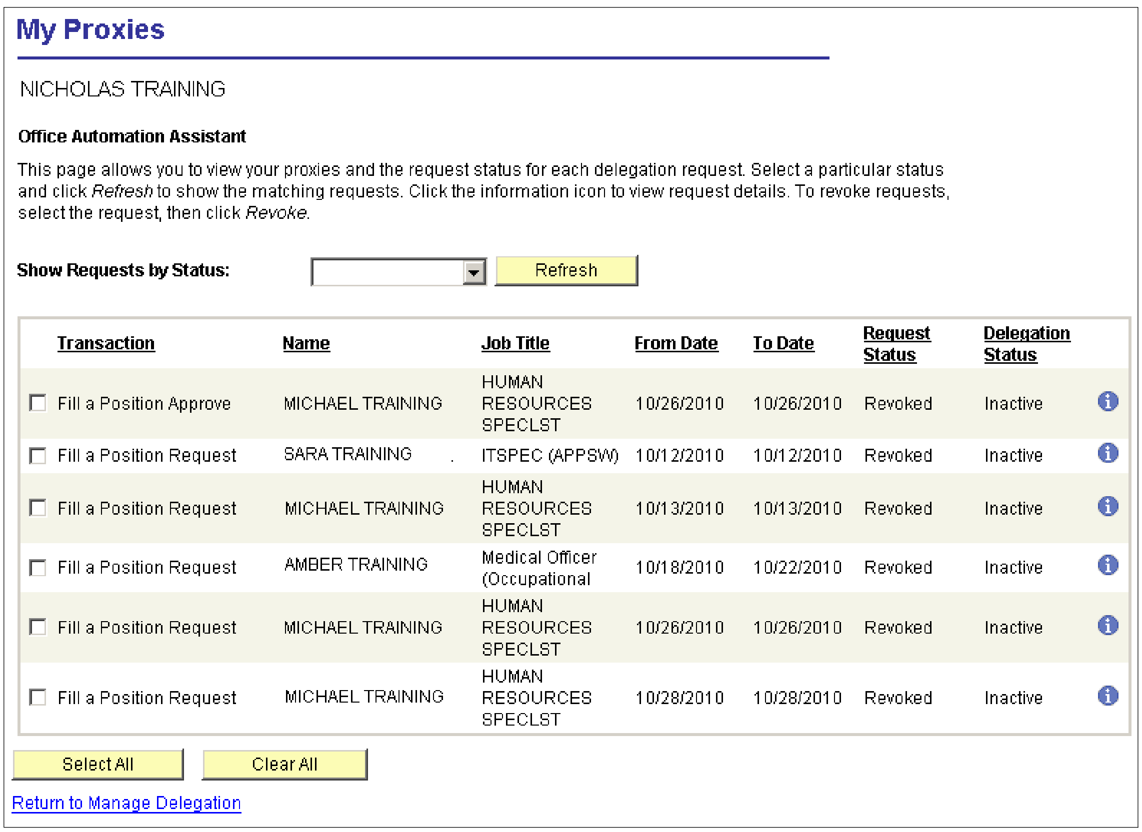
Office Automation Assistant

You have successfully submitted a delegation request. Refer to the My Proxies page to view the status of the request.

OK

Figure 16. Create Delegation Request - Confirmation page

13. Click **OK**. The My Proxies page (**Figure 17**) is displayed. The My Proxies page allows delegators/managers to view their proxies and the request status of each delegation request.



My Proxies

NICHOLAS TRAINING

Office Automation Assistant

This page allows you to view your proxies and the request status for each delegation request. Select a particular status and click *Refresh* to show the matching requests. Click the information icon to view request details. To revoke requests, select the request, then click *Revoke*.

Show Requests by Status: Refresh

Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status
Fill a Position Approve	MICHAEL TRAINING	HUMAN RESOURCES SPECLST	10/26/2010	10/26/2010	Revoked	Inactive
Fill a Position Request	SARA TRAINING	ITSPEC (APPSW)	10/12/2010	10/12/2010	Revoked	Inactive
Fill a Position Request	MICHAEL TRAINING	HUMAN RESOURCES SPECLST	10/13/2010	10/13/2010	Revoked	Inactive
Fill a Position Request	AMBER TRAINING	Medical Officer (Occupational	10/18/2010	10/22/2010	Revoked	Inactive
Fill a Position Request	MICHAEL TRAINING	HUMAN RESOURCES SPECLST	10/26/2010	10/26/2010	Revoked	Inactive
Fill a Position Request	MICHAEL TRAINING	HUMAN RESOURCES SPECLST	10/28/2010	10/28/2010	Revoked	Inactive

Select All Clear All

Return to Manage Delegation

Figure 17. My Proxies page

Accept A Delegation Request

A delegation request must be approved by the proxy before it becomes active. The proxy will receive an email to notify him/her that they have a delegation request. The proxy has the option to either navigate to the Manage Delegation page or click the link to access the page to accept the delegation request.

To accept a delegation request:

1. Select the ***Employee Self Service*** menu group.

2. Select the ***Manage Delegation*** component. The Manage Delegation page (**Figure 11**) is displayed.

3. Click the ***Review My Delegated Authorities*** link. The My Delegated Authorities page (**Figure 18**) is displayed. All delegation transactions for the user will be displayed on the page.

   Note: The user can select the criteria filter to view request with a specific status by selecting an option from the drop-down list and clicking **Refresh**.

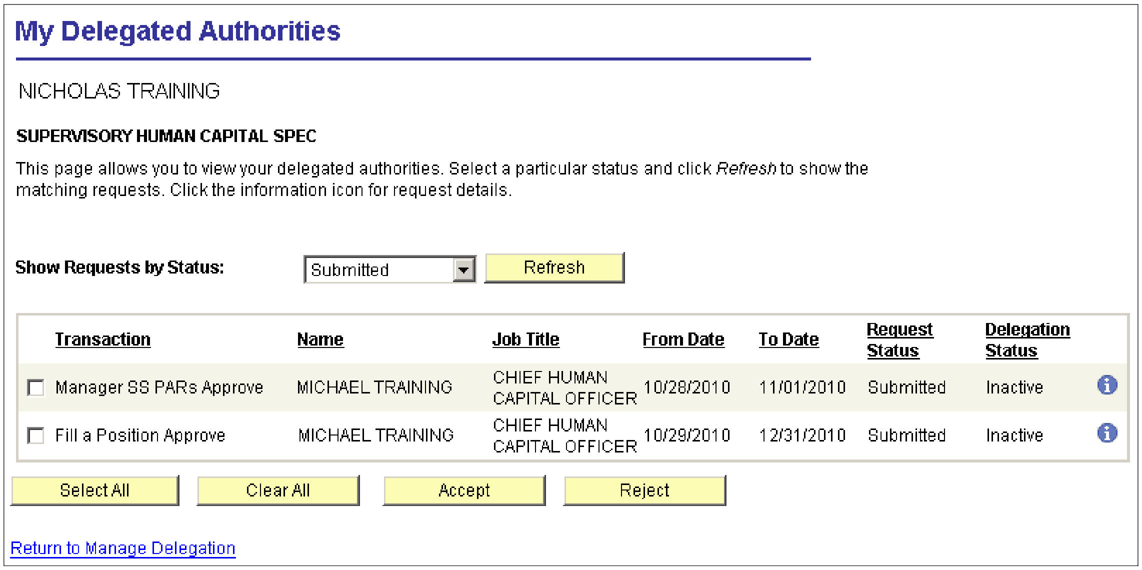


Figure 18. My Delegated Authorities page

4. Select the applicable transaction from the list.

   OR

   Click **Select All** to select all transactions.

   OR

   Click **Clear All** to deselect all transactions.

5. Click **Accept** to accept the delegation of authority. The Accept Delegation Request page (**Figure 19**) is displayed.

   OR

   Click **Reject** to deny the delegation of authority. The Reject Delegation Request page (**Figure 20**) is displayed.

Figure 19. Accept Delegation Request page

Figure 20. Reject Delegation Request page

6. Click **OK**. The My Delegated Authorities page (**Figure 18**) is displayed.

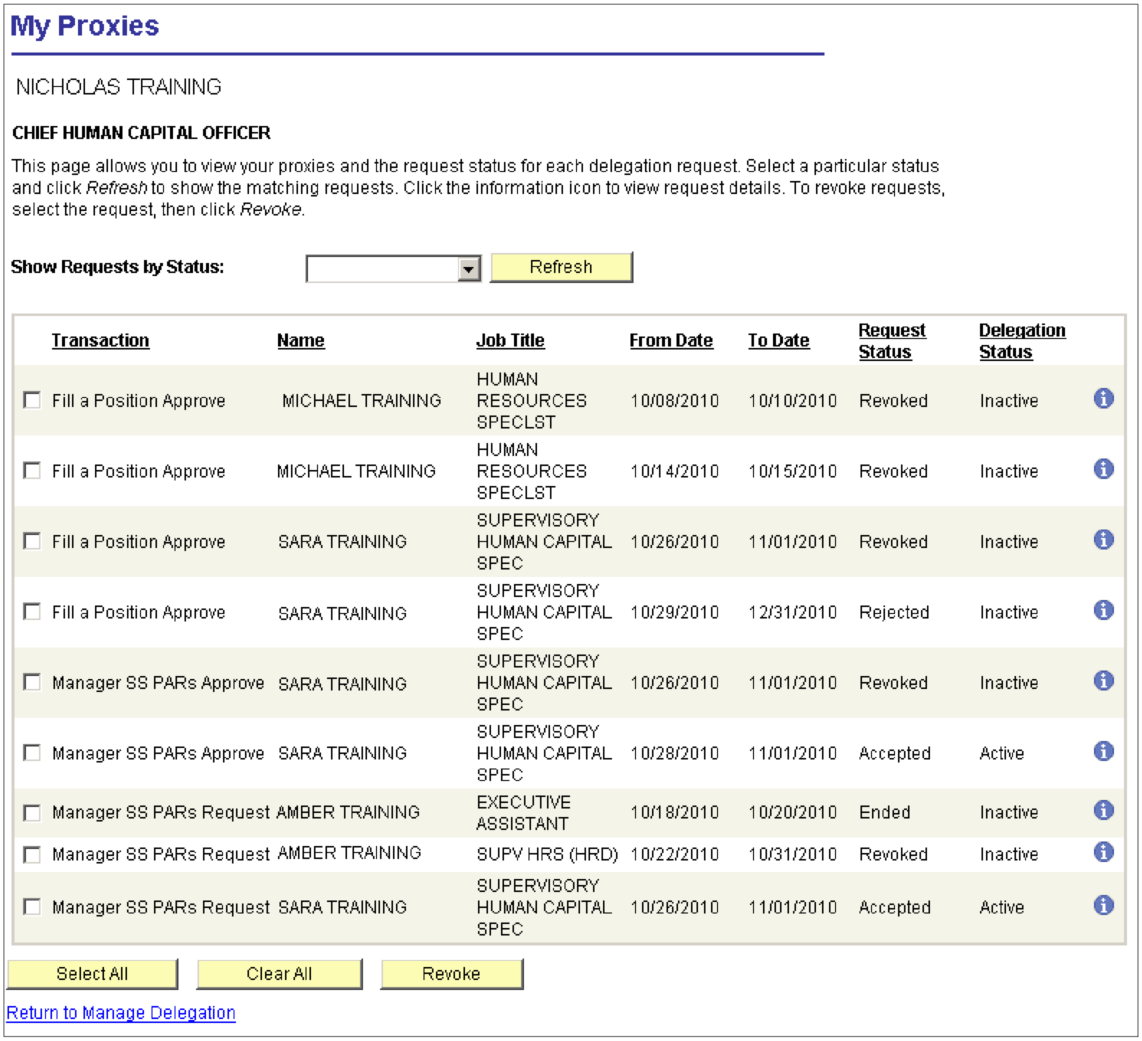
Revoke A Delegation

Once a delegation request is accepted by the proxy, the delegator/manager will still be able to review the transaction, but he/she will not be able to perform any approvals. The delegator/manager will have to either wait for the period of delegation to expire or he/she can revoke delegation authority.

To revoke a delegation:

1. Select the ***Employee Self Service*** menu group.
2. Select the ***Manage Delegation*** component. The Manage Delegation page (**Figure 11**) is displayed.
3. Click the ***Review My Proxies*** link. The My Proxies page (**Figure 21**) is displayed. All delegation requests for the delegator/manager will be displayed on the page.

   Note: The user can select the criteria filter to view request with a specific status by selecting an option from the drop-down list and clicking **Refresh**.



My Proxies

NICHOLAS TRAINING

CHIEF HUMAN CAPITAL OFFICER

This page allows you to view your proxies and the request status for each delegation request. Select a particular status and click *Refresh* to show the matching requests. Click the information icon to view request details. To revoke requests, select the request, then click *Revoke*.

Show Requests by Status: [ ] Refresh

Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status
Fill a Position Approve	MICHAEL TRAINING	HUMAN RESOURCES SPECLST	10/08/2010	10/10/2010	Revoked	Inactive
Fill a Position Approve	MICHAEL TRAINING	HUMAN RESOURCES SPECLST	10/14/2010	10/15/2010	Revoked	Inactive
Fill a Position Approve	SARA TRAINING	SUPERVISORY HUMAN CAPITAL SPEC	10/26/2010	11/01/2010	Revoked	Inactive
Fill a Position Approve	SARA TRAINING	SUPERVISORY HUMAN CAPITAL SPEC	10/29/2010	12/31/2010	Rejected	Inactive
Manager SS PARs Approve	SARA TRAINING	SUPERVISORY HUMAN CAPITAL SPEC	10/26/2010	11/01/2010	Revoked	Inactive
Manager SS PARs Approve	SARA TRAINING	SUPERVISORY HUMAN CAPITAL SPEC	10/28/2010	11/01/2010	Accepted	Active
Manager SS PARs Request	AMBER TRAINING	EXECUTIVE ASSISTANT	10/18/2010	10/20/2010	Ended	Inactive
Manager SS PARs Request	AMBER TRAINING	SUPV HRS (HRD)	10/22/2010	10/31/2010	Revoked	Inactive
Manager SS PARs Request	SARA TRAINING	SUPERVISORY HUMAN CAPITAL SPEC	10/26/2010	11/01/2010	Accepted	Active

Select All   Clear All   Revoke

Return to Manage Delegation

Figure 21. My Proxies page

4. Select the applicable transaction from the list.

   OR

   Click **Select All** to select all transactions.

   OR

   Click **Clear All** to deselect all transactions.

5. Click **Revoke** to revoke the selected delegation authority. The Revoke Delegation Request page (**Figure 22**) is displayed.

Figure 22. Revoke Delegation Request page

6. Click **Yes - Continue** to revoke the selected delegation authority. The Revoke Delegation Request Confirmation page (**Figure 23**) is displayed.

   OR

7. Click **No - Cancel** to cancel the action and return to the My Proxies page (**Figure 21**).

Figure 23. Revoke Delegation Request Confirmation page

8. Click **OK**. The My Proxies page (**Figure 21**) is displayed.

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