

## Oracle E-Business Suite (EBIZ) Delegation Methods

In this Quick Reference Guide approvers will learn how to set up delegates to approve Absence Management and Individual Compensation Distribution (ICD) transactions from their worklist, and delegates will learn how to access the approver's worklist to approve transactions as a delegate.

EBIZ offers three options for delegation of worklist approvals:

1. **Worklist proxies** – Allows access to all worklist notifications for a specific period or indefinitely. Both the user and the delegate receive email notifications for transactions that require approval. Either person may act on the transaction.
2. **Vacation rules** – Reassigns all your worklist notifications to your delegate for the specified period only. Only your delegate receives email notifications for transactions that require approval during the specified period and only the delegate may act on the transaction. Vacation rules is a temporary reassignment to your delegate. If there are specific transactions that you do not want your delegate approving during your absence, they should delegate those transactions back to you after you return (see delegation of individual transactions below).
3. **Delegation of individual transactions** – The approver may delegate individual transactions that they would like the delegate to review and respond to. Each transaction is manually delegated by the primary approver through this method.

Delegates set up through worklist proxies or vacation rules will have access to all the worklist notifications for that user. This includes transactions for both Absence Management and ICD. Users are responsible for ensuring their delegates know which transactions they are permitted to approve on their behalf. Employees are not permitted to approve their own requests.

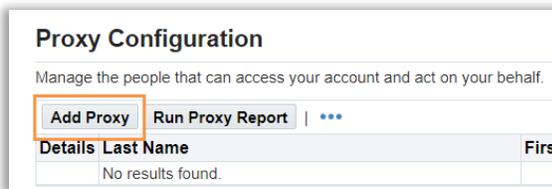
## Worklist Proxies

### Granting Worklist Access

1. To grant worklist proxy access, select the Manage Proxies link from the Preferences drop-down.



2. Click the Add Proxy button.



3. Type and select the name of your proxy into the User Name field. You must select a start date, leaving the end date blank leaves the end date open and is not required. Select the **All** radio-button to delegate all responsibilities to your proxy. Click Submit to add your proxy.

**Add People** Submit Cancel

**Add Proxy**

\* User Name   Notes to Proxy

\* Active From 28-May-2021

Active To

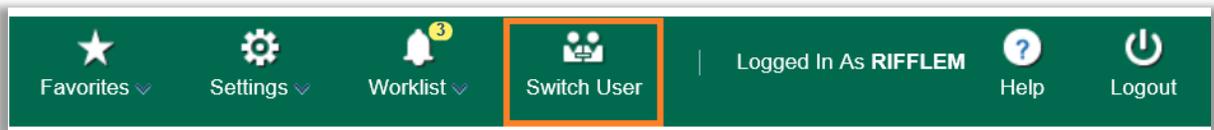
**Grant Worklist Access**

Workflow Item Types  None  
 Selected  
 All

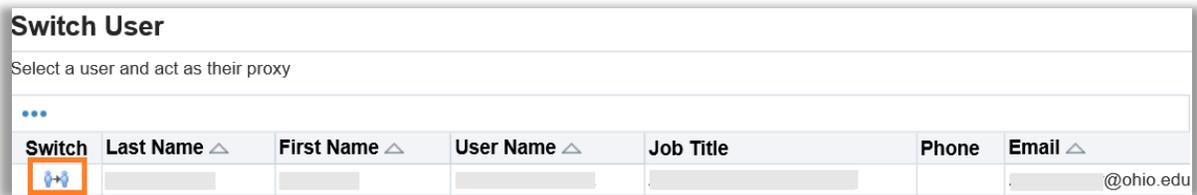
## Approving Transactions as a Proxy

If you have been added as a proxy to someone’s account, you may switch to their account and approve transactions from their worklist.

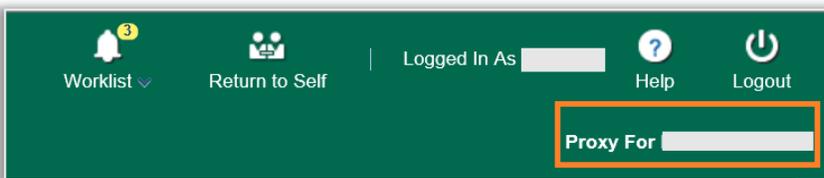
1. Click on the Switch User icon/link on the homepage header (you will only see this icon/link if you have been set up as someone’s proxy)



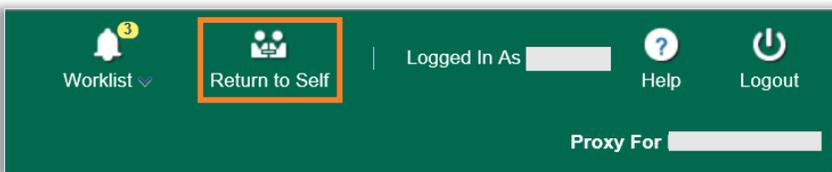
2. Click on the Switch icon next to the name of the person’s worklist that you need to access.



3. The name of the person who you are proxying for will now appear at the top of the homepage.



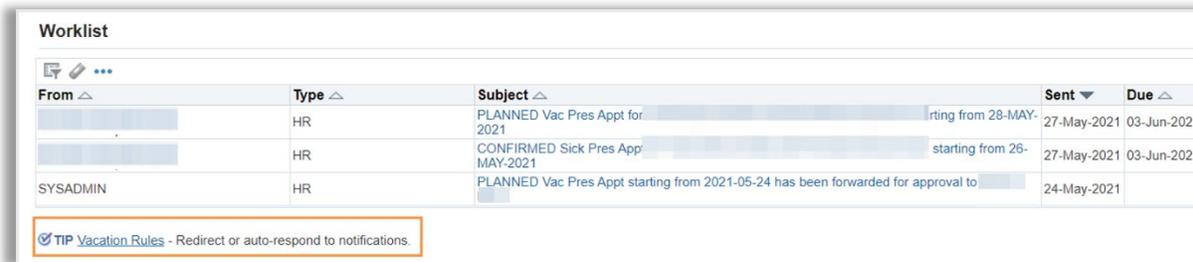
4. Navigate to their worklist and respond to their open worklist items as appropriate. For instructions on approving absence management and ICD transactions, please review the [Absence Management Manager Manual](#) and the [ICD Approver Quick Reference Guide](#).
5. Once you are finished accessing their worklist, you may return to your own login by selecting the Return to Self icon/link at the top of the page.



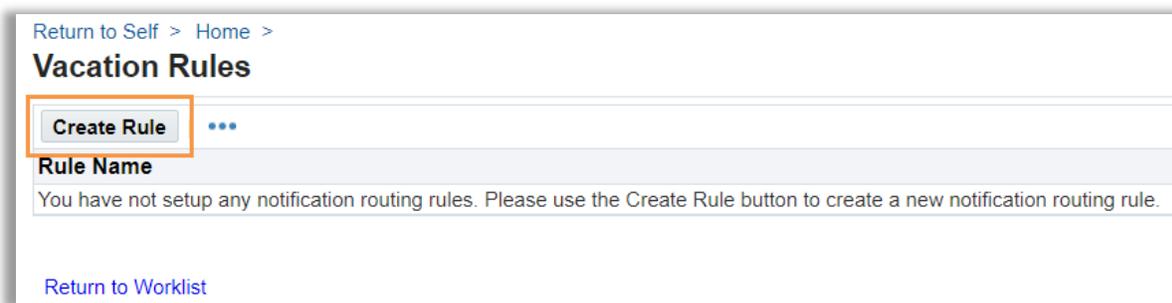
## Vacation Rules

### Setting Up Vacation Rules

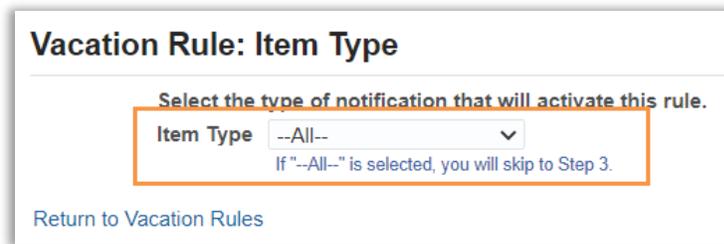
1. To set up vacation rules, select the Vacation Rules link from your worklist.



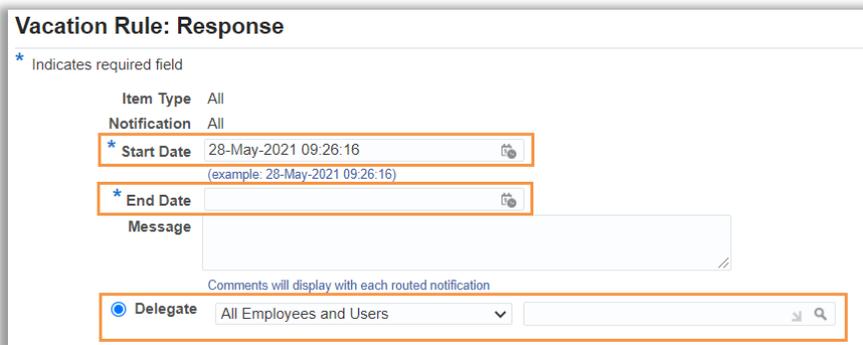
2. Click the Create Rule button.



3. From the drop down, select All. Click Next to go to the next step.



4. Enter the Start and End dates and select your delegate. Click Apply to complete the vacation rule.



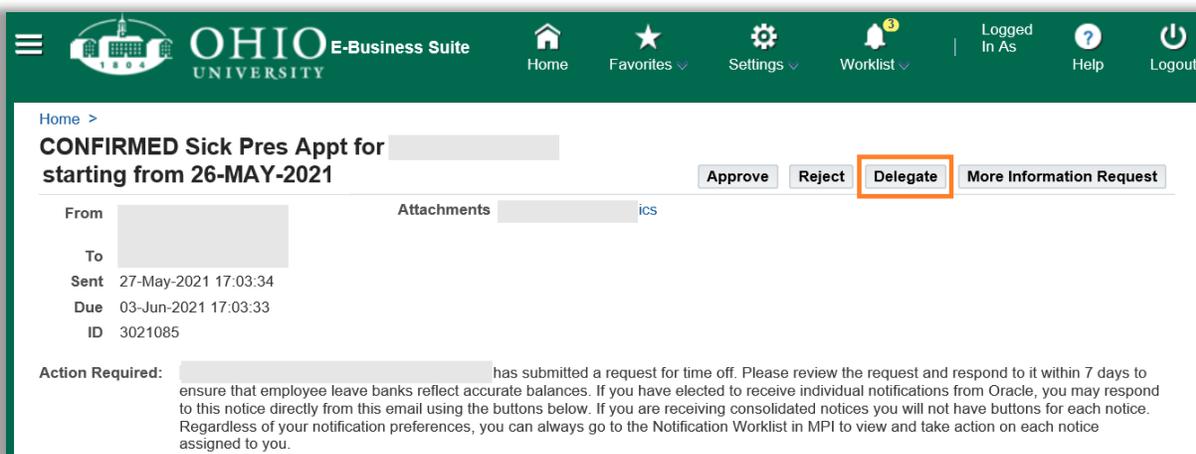
## Approving Transactions Through Vacation Rules

If you have been added as a delegate through vacation rules, the worklist notices will be delivered directly to your worklist and email. You will not need to switch to the primary approver's worklist to approve these transactions. For instructions on approving absence management and ICD transactions from your worklist or email, please review the [Absence Management Manager Manual](#) and the [ICD Approver Quick Reference Guide](#).

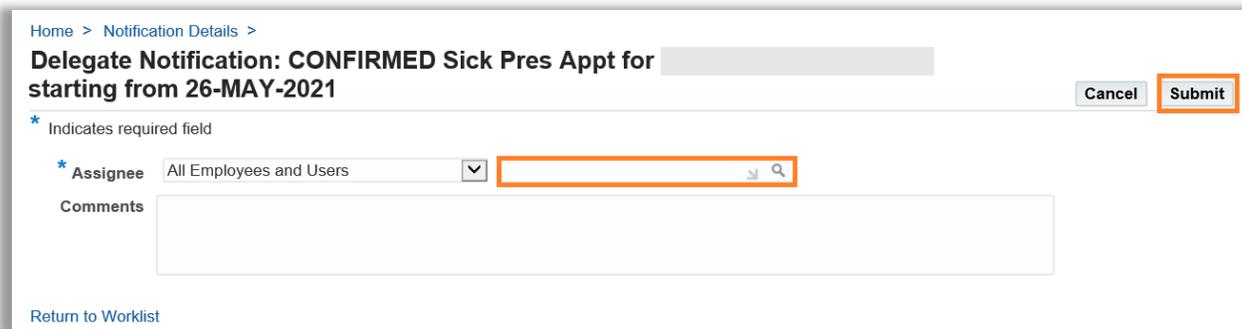
## Delegation of Individual Transactions

If there are specific transactions that you want someone else to review and respond to, you may delegate those individual transactions.

1. Open the worklist notice from your homepage or the worklist icon.
2. Click on the Delegate button



3. Enter the assignee's name, add comments if appropriate, and press Submit.



## Approving Transactions Through Individual Delegation

Worklist transactions that are manually delegated to you will be delivered directly to your worklist and email. You will not need to switch to the primary approver's worklist to approve these transactions. For instructions on approving absence management and ICD transactions from your worklist or email, please review the [Absence Management Manager Manual](#) and the [ICD Approver Quick Reference Guide](#).

Questions? Contact [uhr@ohio.edu](mailto:uhr@ohio.edu) for assistance.