

POSITION MANAGEMENT & ANU DELEGATION in the HRMS

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SECTION A: Maintain position and delegation data within position management

1. Creating a new position with delegation

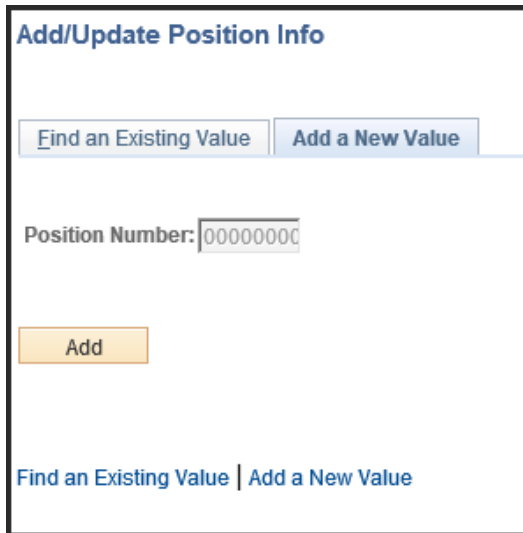
To create positions, use the Position Data component in HRMS.

A position is uniquely identified by a "Position Number". This number is automatically issued by HRMS at the time of position creation. It represents a job in the University, independent of any particular employee.

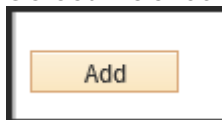
A person holding a position is known as "Incumbent", also referred to as "Occupant". When an incumbent leaves a position, the position remains "vacant" to be filled again. A new position number should not be created for the person who filled the vacancy. The same position number should be used to assign to the person who filled the vacancy. This way, specific attributes such as position title, job code, full/part-time, department ID, location code, reports-to, salary plan and grade, will automatically flow through to the incumbent's job data. As delegation becomes an intrinsic element of a position, using position number correctly will enable the position incumbent to inherit the delegation promptly and accurately.

Follow the process below to create a new position, generate a position number, and assign delegation to the new position.

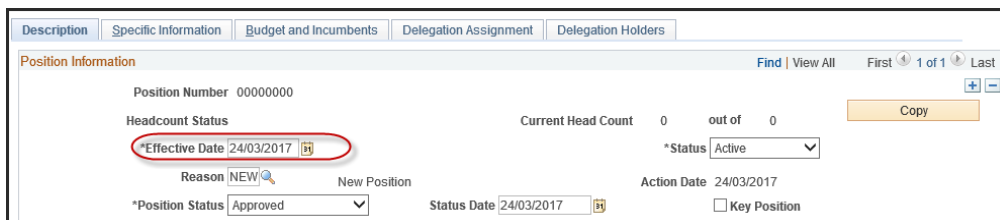
- 1 Navigate to: **Main Menu > Organisational Development > Position Management > Maintain Positions/Delegations > Add/Update Position Info**
- 2 Select the **Add a New Value** tab.



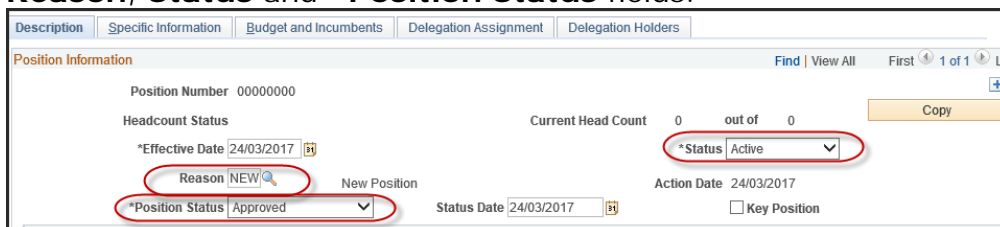
- 3 Select **Add** button.




- 4 Enter the effective date into the ***Effective Date** field e.g. "**24/03/2017**". This effective date will be the earliest date which you will be able to hire employees on this position.



- 5 Some fields will have the correct value default for this first row. Check the **Reason**, **Status** and ***Position Status** fields.





- 6 Enter the desired information into the **Job Code** field. Enter a valid value e.g. "**G8ADM**". Selecting the  icon will bring up a list of **Job Code** values you can select from.

- 7 Press **[tab]**.



Pressing the tab button will allow data from the Job Code to flow through to the position.

- 8 Enter the desired information into the **Department** field. Enter a valid value e.g. "PH600". Selecting the  icon will bring up a list of **Department** values you can select from.
- 9 Press **[tab]**.
Pressing the tab button will allow data from the department to flow through to the position.
- 10 Enter the desired information into the **Reports To** field. Enter a valid value e.g. "18002". This allows you to select the supervisor that all people on this position will report to. Selecting the  icon will bring up a list of **Reports To** values you can select from.
- 11 Press **[tab]**.
Pressing the tab button will allow data related to the Reports To position to flow through.
- 12 Check the **Full/Part Time** fields. Do not change these to the preferred option. **Please note:** Positions within HRMS can be either full-time or casual. They are made part-time through the employee's work schedule.
- 13 Check the **Salary Plan Information** section to ensure the details are correct. These details will flow through to Job Data when a person is connected to this position:

Salary Plan Information							
Salary Admin Plan	<input type="text" value="GNRL"/>	Grade	<input type="text" value="6/7"/>	Step	<input type="text"/>		
Standard Hours	<input type="text" value="35.00"/>	Work Period	<input type="text" value="W"/>	Weekly			
Mon	Tue	Wed	Thu	Fri	Sat	Sun	
<input type="text" value="7.00"/>	<input type="text" value="7.00"/>	<input type="text" value="7.00"/>	<input type="text" value="7.00"/>	<input type="text" value="7.00"/>	<input type="text"/>	<input type="text"/>	

- 14 Your screen should look something like the following:



Position Information

Position Number 00000000
 Headcount Status Current Head Count 0 out of 0
 *Effective Date 24/03/2017 *Status Active
 Reason NEW New Position Action Date 24/03/2017
 *Position Status Approved Status Date 24/03/2017 Key Position

Job Information

*Business Unit ANUID Australian National University Casual Category
 Job Code G8ADM ANU Officer 8 (Administration)
 *Reg/Temp Regular *Full/Part Time Full-Time
 Title ANU Officer 8 (Administration) Short Title ANUO 8 Detailed Position Description

Work Location

*Reg Region AUS Australia
 Department PH600 National Centre for Epidemiology Company ANU Australian National University
 Location J062 Block M - NCEPH
 Reports To 00018002 Fellow Dot-Line
 Supervisor Lvl Security Clearance

Salary Plan Information

Salary Admin Plan GNRL Grade 8 Step
 Standard Hours 35.00 Work Period W Weekly
 Mon 7.00 Tue 7.00 Wed 7.00 Thu 7.00 Fri 7.00 Sat Sun

Updated on Updated By

15 Select the **Specific Information** tab:

Specific Information

Position Number 00000000
 Headcount Status Current Head Count 0 out of 0
 Effective Date 24/03/2017 Status Active

Max Head Count 1
 Mail Drop ID
 Work Phone
 Health Certificate
 Signature Authority

Incumbents

Update Incumbents
 Include Salary Plan/Grade
 Budgeted Position
 Confidential Position
 Job Sharing Permitted
 Available for Telework

Education and Government

Position Pool ID
 *Pre-Encumbrance Indicator Encumber Immediately Calc Group (Flex Service)
 *Encumber Salary Option Salary Step Academic Rank
 *Classified Indicator Classified FTE 0.000000 Adds to FTE Actual Count

Save Notify Add Update/Display Include History Correct History

Description | Specific Information | Budget and Incumbents | Delegation Assignment | Delegation Holders

16 For all new positions, the **Update Incumbents** flag should be un-checked.



Position Number 00000000
Headcount Status Current Head Count 0 out of 0

Effective Date 24/03/2017 Status Active

Max Head Count 1

Mail Drop ID
Work Phone
Health Certificate
Signature Authority

Incumbents

- Update Incumbents
- Include Salary Plan/Grade
- Budgeted Position
- Confidential Position
- Job Sharing Permitted
- Available for Telework

Education and Government

Position Pool ID
*Pre-Encumbrance Indicator Encumber Immediately
*Encumber Salary Option Salary Step
*Classified Indicator Classified

Calc Group (Flex Service)
Academic Rank
FTE 0.000000 Adds to FTE Actual Count

Save Notify Add Update/Display Include History Correct History

- 17 Select the **Adds to FTE Actual Count** checkbox.
If this is truly a single headcount position, make sure **Max Head Count** field contains value 1.

Effective Date 28/03/2017 Status Active

Max Head Count 1

Mail Drop ID
Work Phone
Health Certificate
Signature Authority

Incumbents

- Update Incumbents
- Include Salary Plan/Grade
- Budgeted Position
- Confidential Position
- Job Sharing Permitted
- Available for Telework

Education and Government

Position Pool ID
*Pre-Encumbrance Indicator Encumber Immediately
*Encumber Salary Option Salary Step
*Classified Indicator Classified

Calc Group (Flex Service)
Academic Rank
FTE 0.000000 Adds to FTE Actual Count

- 18 Select the **Budget and Incumbents** tab:



Position Number 00000000
Headcount Status Current Head Count 0 out of 0

Current Budget

Head Count	Current Budget FTE	Amount
0	0.00	0.000

Personalise | Find | View All | First 1 of 1 Last

*Position Category
1 Not Applicable

Current Incumbents

Empl ID	Empl Record	Full/Part	Std Hrs/Wk	Name	Effective Date	Action	Action Reason	Override Position Data	Job Data
0			0.00		24/03/2017				Job Data

Personalise | Find | First 1 of 1 Last

Substantive Incumbents

Empl ID	Empl Record	Full/Part Time	Standard Hours	Name	Job Data
1	0		0.00		Job Data

Save Notify Add Update/Display Include History Correct History

- 19 Select the ***Position Category** drop-down arrow and select an entry from the list.

- 20 Your screen should look something like the following:

Position Number 00000000
Headcount Status Current Head Count 0 out of 0

Current Budget

Head Count	Current Budget FTE	Amount
0	0.00	0.000

Personalise | Find | View All | First 1 of 1 Last

*Position Category
1 Human Resources

Current Incumbents

Empl ID	Empl Record	Full/Part	Std Hrs/Wk	Name	Effective Date	Action	Action Reason	Override Position Data	Job Data
0			0.00		24/03/2017				Job Data

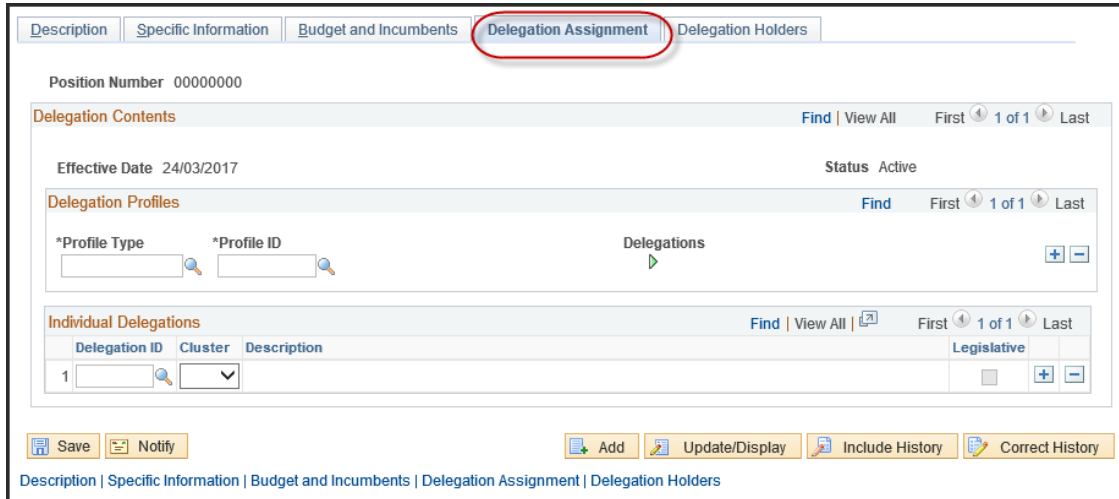
Personalise | Find | First 1 of 1 Last

Substantive Incumbents

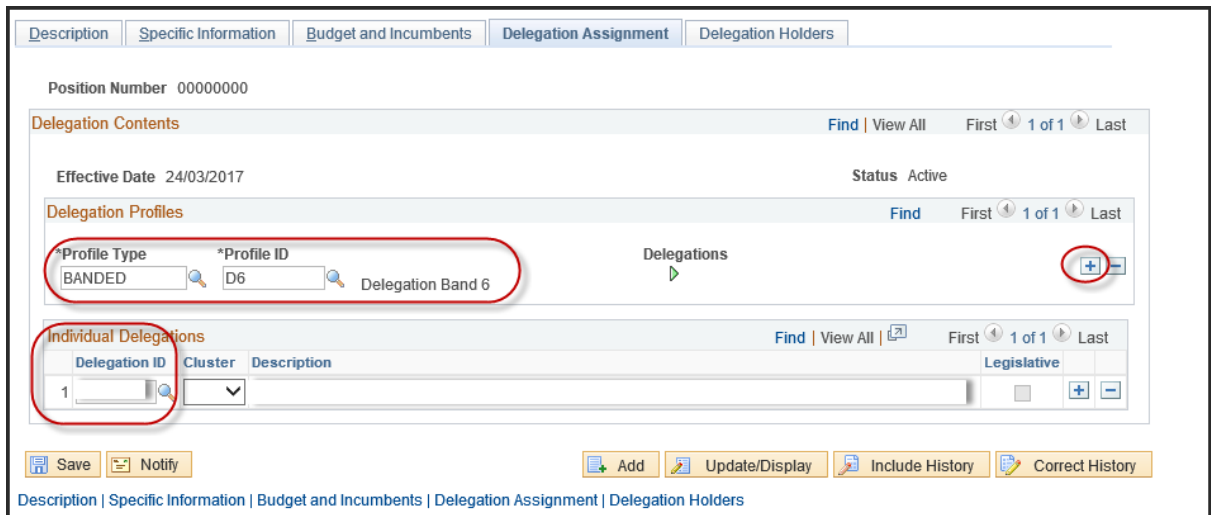
Empl ID	Empl Record	Full/Part Time	Standard Hours	Name	Job Data
1	0		0.00		Job Data

Save Notify Add Update/Display Include History Correct History

21 Select the **Delegation Assignment** tab:



22 Enter the delegation information in the Delegation Contents section:



Depending upon the delegation composition of a position, you can populate either the Delegation Profiles section, or the Individual Delegations section or both sections:

Adding Delegation profiles


Use '+' button to add a new delegation profile or individual delegation id:

- Enter a valid **Profile Type** or search for options using the magnifying glass.
- Enter a valid **Profile ID**, or search using the magnifying glass

Multiple profiles and ID's can be added by using the '+' button

To see the actual delegation ID's that make up a profile type and ID



combination, select the right-arrow button  under the Delegations header to bring up a list of actual delegation ID's.

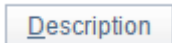
Adding Individual Delegations

Enter a valid **Delegation ID** and **Cluster** in the corresponding fields.

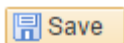
23 Your screen should look something like the following –

The screenshot shows the 'Delegation Assignment' tab in the HR system. At the top, there are tabs for 'Description', 'Specific Information', 'Budget and Incumbents', 'Delegation Assignment', and 'Delegation Holders'. The 'Delegation Assignment' tab is active. Below the tabs, the 'Position Number' is 00000000. The 'Delegation Contents' section shows 'Effective Date' as 24/03/2017 and 'Status' as Active. The 'Delegation Profiles' section shows '*Profile Type' as BANDED and '*Profile ID' as D6. The 'Individual Delegations' section shows a table with columns for 'Delegation ID', 'Cluster', and 'Description'. The 'Delegation ID' field contains '1'. The 'Cluster' dropdown is set to 'Delegation Band 6'. The 'Description' field is empty. The screen also includes navigation buttons like 'Save', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

24 Select the **Description** tab.



25 Select the **Save** button.



System will issue a position number for the new position.

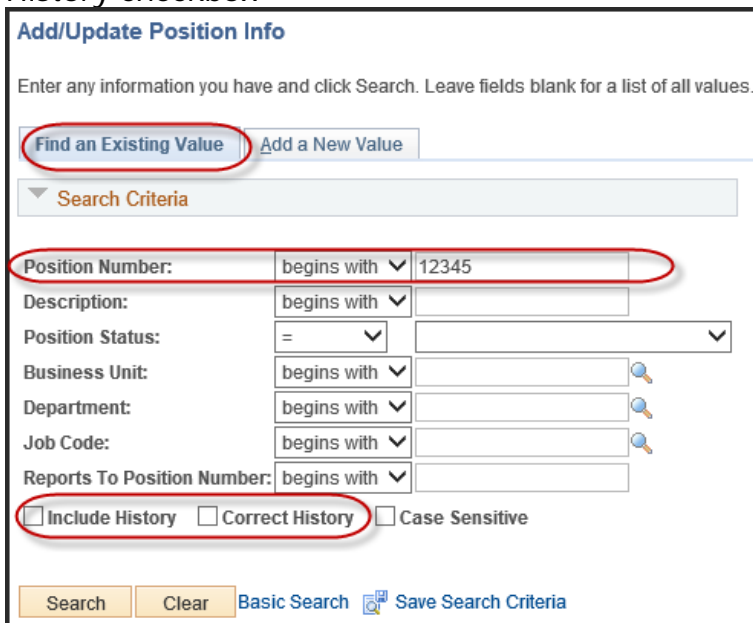
Position Number 00031736

2. Assigning delegations to a new position

Once a new position has been created, you can add a new row and on that new row, assign delegations to the position. As position data does not have effective sequence, you cannot use the position creation effective date unless you have Correct History access to make the changes, or, the position creation effective date is in the future therefore you should have sufficient update access to change data on the existing row.

Follow the process below to create a new position, generate a position number, and assign delegation to the new position.

- 1 Navigate to **Main Menu>Organisational Development>Position Management>Maintain Positions/Delegations>Add/Update Position Info**
- 2 In the **Find an Existing Value** tab, enter the position number in the **Position Number** field. If you have Correct History access, Select Correct History checkbox. If you do not have Correct History access, Select Include History checkbox



Add/Update Position Info

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

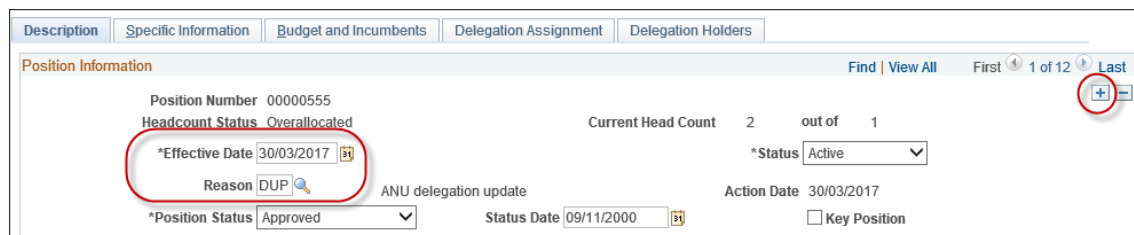
Search Criteria

Position Number:	begins with	12345
Description:	begins with	
Position Status:	=	
Business Unit:	begins with	
Department:	begins with	
Job Code:	begins with	
Reports To Position Number:	begins with	

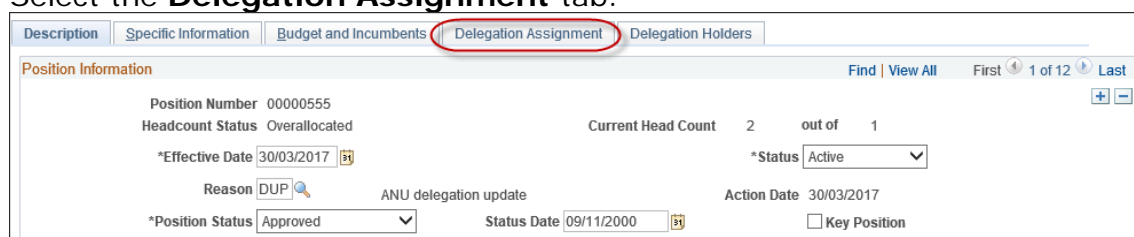
Include History | Correct History | Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

- 3 Select **Search** button
- Search**
- 4 On the **Description** tab, insert a new row by selecting the '+' symbol and enter a new date in the **Effective Date** field. Enter a **Reason** in the corresponding field, e.g. "DUP":



5 Select the **Delegation Assignment** tab:



6 Enter the delegation information:


Depending upon the delegation composition of a position, you can populate either the Delegation Profiles section, or the Individual Delegations section or both sections:

Adding Delegation profiles

Use '+' button to add a new delegation profile or individual delegation id:

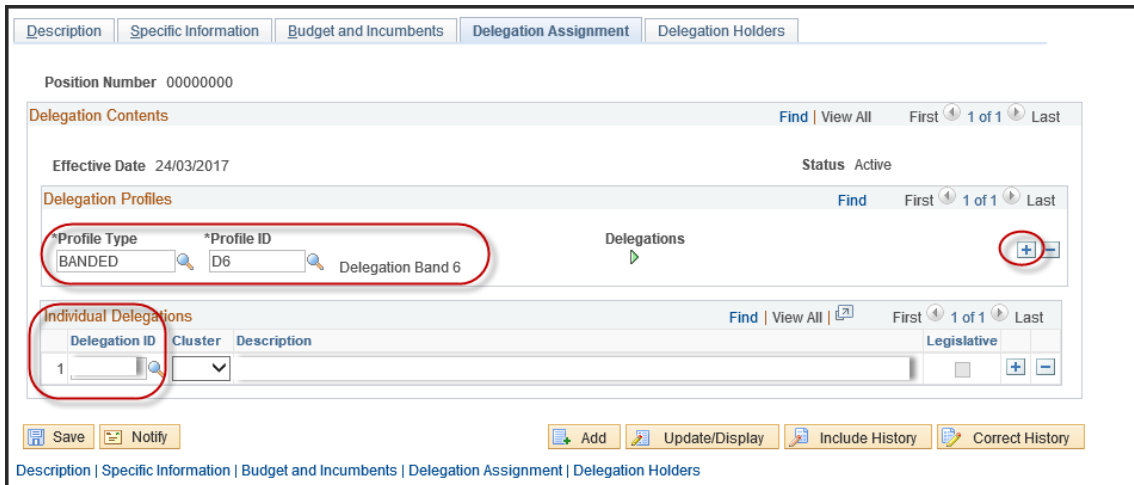
- Enter a valid **Profile Type** or search for options using the magnifying glass.
- Enter a valid **Profile ID**, or search using the magnifying glass

Multiple profiles and ID's can be added by using the '+' button

To see the actual delegation ID's that make up a profile type and ID combination, select the right-arrow button  under the Delegations header to bring up a list of actual delegation ID's.

Adding Individual Delegations

Enter a valid **Delegation ID** and **Cluster** in the corresponding fields.

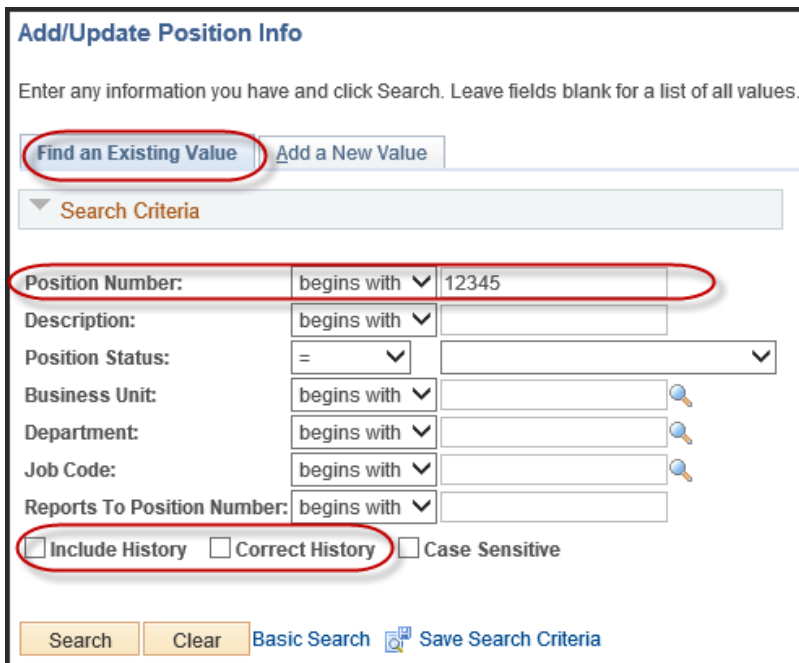


7 **Note:** For all changes related to delegation, the **Update Incumbents** flag in the **Specific Information** tab will be un-checked and grayed out. There is no need to flow the delegation data changes to the incumbent's job data.

8 Select the **Description** tab and select **save**.

3. Updating position delegations

- 1 Navigate to **Main Menu>Organisational Development>Position Management>Maintain Positions/Delegations>Add/Update Position Info**
- 2 In the **Find an Existing Value** tab, enter the **Position number** in the corresponding field. If you have Correct History access, select the **Correct History checkbox**. If you do not have Correct History access, Select **Include History** checkbox and **search**



Add/Update Position Info

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

▼ Search Criteria

Position Number: begins with ▼ 12345

Description: begins with ▼

Position Status: = ▼

Business Unit: begins with ▼

Department: begins with ▼

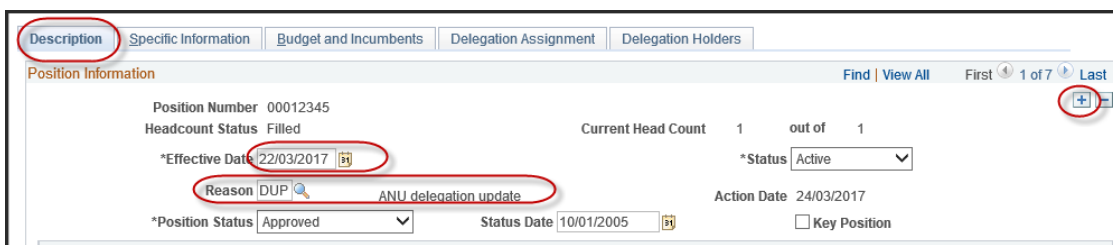
Job Code: begins with ▼

Reports To Position Number: begins with ▼

Include History Correct History Case Sensitive

Search Clear Basic Search Save Search Criteria

- 3 On the **Description** tab, insert a new row by selecting the '+' symbol and enter the **Effective Date** of the change, and **Reason** for the update in the corresponding fields:



Description | Specific Information | Budget and Incumbents | Delegation Assignment | Delegation Holders

Position Information Find | View All First 1 of 7 Last

Position Number 00012345 Current Head Count 1 out of 1

Headcount Status Filled *Effective Date 22/03/2017 *Status Active

Reason DUP ANU delegation update Action Date 24/03/2017

*Position Status Approved Status Date 10/01/2005 Key Position

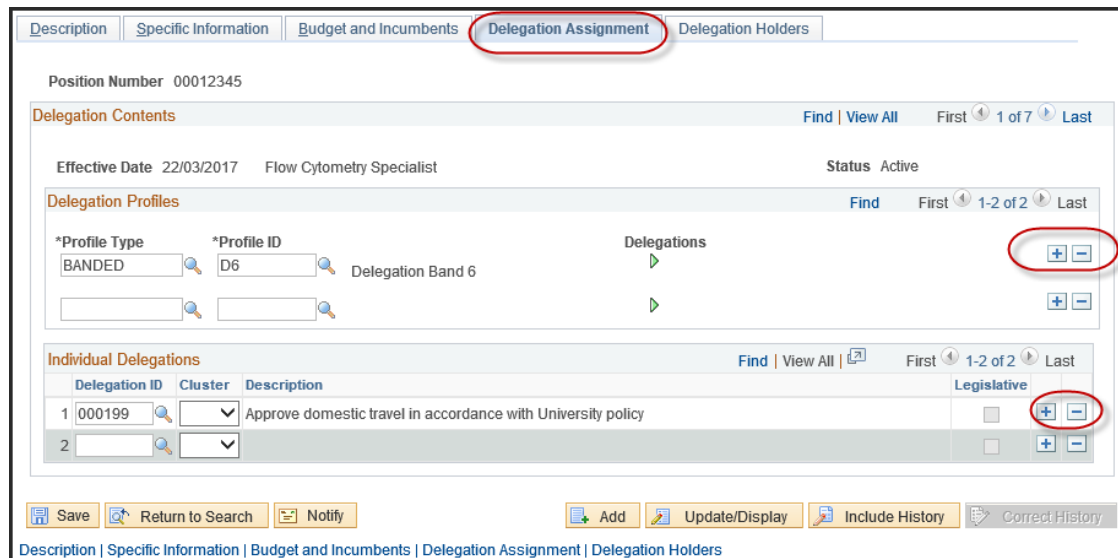
- 5 Navigate to the **Delegation Assignment** tab.

Updating Delegation profiles:

Use '+' button to add a new delegation profile or individual delegation id:

- Enter a valid **Profile Type** or search for options using the magnifying glass.
- Enter a valid **Profile ID**, or search using the magnifying glass

Use the '-' button to remove a delegation profile or individual delegation id



The screenshot shows the 'Delegation Assignment' tab selected. It includes a 'Position Number' field (00012345), 'Delegation Contents' section with 'Effective Date' (22/03/2017) and 'Flow Cytometry Specialist', and 'Delegation Profiles' section with input fields for '*Profile Type' (BANDED) and '*Profile ID' (D6). Below this is a 'Delegations' table with a right-arrow button circled in red. At the bottom, there is an 'Individual Delegations' table with columns for 'Delegation ID', 'Cluster', 'Description', and 'Legislative', and a '+' button circled in red. Navigation buttons like 'Save', 'Add', and 'Update/Display' are at the bottom.

Multiple profiles and ID's can be added by using the '+' button

To see the actual delegation ID's that make up a profile type and ID combination, select the right-arrow button under the Delegations header to bring up a list of actual delegation ID's.

Individual Delegations:

Enter a valid **Delegation ID** and **Cluster** in the corresponding fields.

- 7 For all changes related to delegation, the **Update Incumbents** flag in the **Specific Information** tab will be un-checked and grayed out. There is no need to flow the delegation data changes to the incumbent's job data.



Navigation tabs: Description, **Specific Information**, Budget and Incumbents, Delegation Assignment, Delegation Holders

Position Number 00012345
Headcount Status Filled
Current Head Count 1 out of 1

Specific Information Find | View All First 1 of 6 Last

Effective Date 09/12/2010 Status Active

Max Head Count 1
Mail Drop ID
Work Phone
Health Certificate
Signature Authority

Incumbents
 Update Incumbents
 Include Salary Plan/Grade
 Budgeted Position
 Confidential Position
 Job Sharing Permitted
 Available for Telework

Education and Government
Position Pool ID
*Pre-Encumbrance Indicator Encumber Immediately
*Encumber Salary Option Salary Step
*Classified Indicator Classified
Calc Group (Flex Service)
Academic Rank
FTE 1.000000 Adds to FTE Actual Count

Buttons: Save, Return to Search, Notify, Add, Update/Display, Include History, Correct History

Description | Specific Information | Budget and Incumbents | Delegation Assignment | Delegation Holders

8 Select the **Description** tab and select **save**.

Navigation tabs: **Description**, Specific Information, Budget and Incumbents, Delegation Assignment, Delegation Holders

Position Information Find | View All First 1 of 6 Last

Position Number 00012345
Headcount Status Filled
Current Head Count 1 out of 1

*Effective Date 09/12/2010 *Status Active
Reason MSC Mass Position Change Action Date 10/12/2010
*Position Status Approved Status Date 10/01/2005 Key Position

Job Information
*Business Unit ANUID Australian National University Casual Category
Job Code G8SPC ANU Officer Gr 8 (Specialist)
*Reg/Temp Regular *Full/Part Time Full-Time
Title Flow Cytometry Specialist Short Title ANUO 8 SPC Detailed Position Description

Work Location
*Reg Region AUS Australia
Department 42560 Em/Histo/Facs Facility Company ANU Australian National University
Location J131 John Curtin School of Medical
Reports To 00001658 ANU Officer 8 (Technical) Dot-Line
Supervisor Lvl Security Clearance

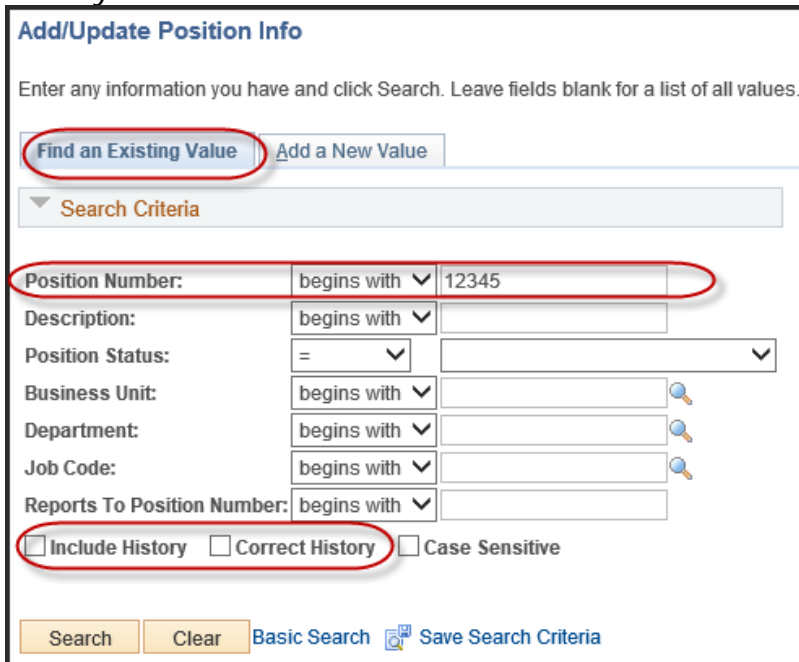
Salary Plan Information
Salary Admin Plan GNRL Grade 8 Step
Standard Hours 35.00 Work Period W Weekly
Mon 7.00 Tue 7.00 Wed 7.00 Thu 7.00 Fri 7.00 Sat Sun

Australia
Updated on 10/12/2010 11:59:14 Updated By U4456226 Skye Luton

Buttons: Save, Return to Search, Notify, Add, Update/Display, Include History, Correct History

4. Inactivating a position that holds delegations

- 1 Navigate to **Main Menu>Organisational Development>Position Management>Maintain Positions/Delegations>Add/Update Position Info**
- 2 In the **Find an Existing Value** tab, enter the position number in the **Position Number** field. If you have Correct History access, Select Correct History checkbox. If you do not have Correct History access, Select Include History checkbox and **Search**



Add/Update Position Info

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

Position Number: begins with 12345

Description: begins with

Position Status: =

Business Unit: begins with

Department: begins with

Job Code: begins with

Reports To Position Number: begins with

Include History Correct History Case Sensitive

Search Clear Basic Search Save Search Criteria

- 3 On the **Description** tab, insert a new row by selecting the '+' button and enter the inactive date for the position in the **effective date** field. Use **INA** in the **Reason** field. Ensure the **Status** field is set to **Inactive**



Position Information

Position Number 00001234

Headcount Status Open

Current Head Count 0 out of 9999

*Effective Date 28/03/2017

Reason INA

*Status Inactive

Position Inactivated

Action Date 24/03/2017

*Position Status Approved

Status Date 09/11/2000

Key Position

- 6 Go to the **Delegation Assignment** tab and remove all Delegation ID's and Individuals Delegations by using the '-' button and **Save**



Description | Specific Information | Budget and Incumbents | **Delegation Assignment** | Delegation Holders

Position Number 00001234

Delegation Contents [Find](#) | [View All](#) First 1 of 3 Last

Effective Date 24/03/2017 Postdoctoral Fellow (Level A) Status Active

Delegation Profiles [Find](#) First 1 of 1 Last

*Profile Type *Profile ID Delegations

Delegation Band 6

Individual Delegations [Find](#) | [View All](#) First 1 of 1 Last

Delegation ID	Cluster	Description	Legislative
1	<input type="text" value="000199"/>	Approve domestic travel in accordance with University policy	<input type="checkbox"/>

Description | Specific Information | Budget and Incumbents | **Delegation Assignment** | Delegation Holders

Position Number 00001234

Delegation Contents [Find](#) | [View All](#) First 1 of 3 Last

Effective Date 24/03/2017 Postdoctoral Fellow (Level A) Status Active

Delegation Profiles [Find](#) First 1 of 1 Last

*Profile Type *Profile ID Delegations

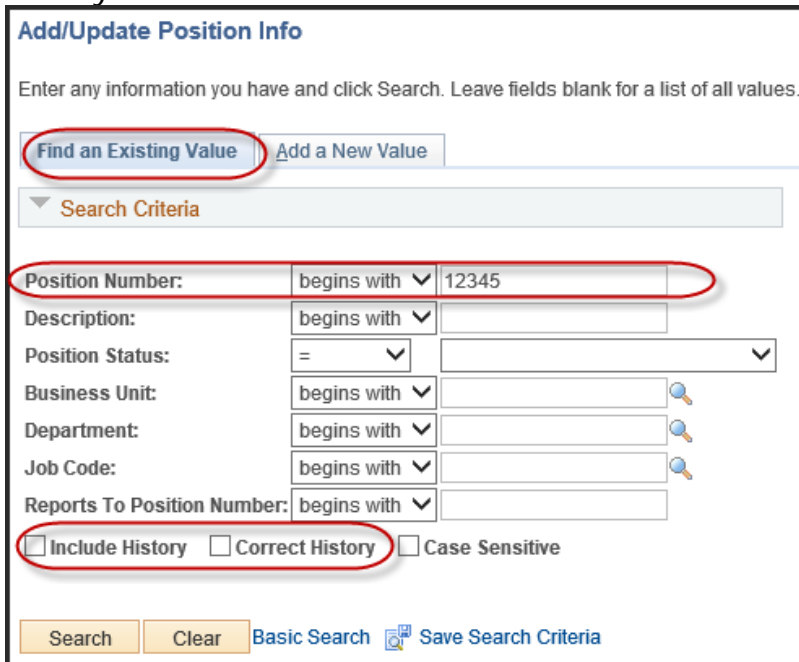
Individual Delegations [Find](#) | [View All](#) First 1 of 1 Last

Delegation ID	Cluster	Description	Legislative
1	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Description | Specific Information | Budget and Incumbents | Delegation Assignment | Delegation Holders

5. Inactivating delegations held by a position

- 1 Navigate to **Main Menu>Organisational Development>Position Management>Maintain Positions/Delegations>Add/Update Position Info**
- 2 In the **Find an Existing Value** tab, enter the position number in the **Position Number** field. If you have Correct History access, Select Correct History checkbox. If you do not have Correct History access, Select Include History checkbox and **Search**



Add/Update Position Info

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Position Number: begins with 12345

Description: begins with

Position Status: =

Business Unit: begins with

Department: begins with

Job Code: begins with

Reports To Position Number: begins with

Include History Correct History Case Sensitive

Search Clear Basic Search Save Search Criteria

- 3 On the **Description** tab, insert a new row by selecting the '+' button and enter the inactive date for the delegation in the **effective date** field. Use **DIN** in the **Reason** field. Ensure the **Status** remains set to **Active**



Description | Specific Information | Budget and Incumbents | Delegation Assignment | Delegation Holders

Position Information Find | View All First 1 of 2 Last

Position Number 00001234
Headcount Status Open
Current Head Count 0 out of 9999

*Effective Date 29/03/2017
Reason DIN ANU delegation inactivated
Action Date 29/03/2017

*Position Status Approved Status Date 09/11/2000
 Key Position

Job Information

- 6 Go to the **Delegation Assignment** tab and remove all Delegation ID's and Individuals Delegations by using the '-' button and **Save**



Description | Specific Information | Budget and Incumbents | **Delegation Assignment** | Delegation Holders

Position Number 00001234

Delegation Contents Find | View All First 1 of 3 Last

Effective Date 24/03/2017 Postdoctoral Fellow (Level A) Status Active

Delegation Profiles Find First 1 of 1 Last

*Profile Type BANDED *Profile ID D6 Delegation Band 6 Delegations + -

Individual Delegations Find | View All | [?] First 1 of 1 Last

Delegation ID	Cluster	Description	Legislative
1 000199		Approve domestic travel in accordance with University policy	<input type="checkbox"/>

Description | Specific Information | Budget and Incumbents | **Delegation Assignment** | Delegation Holders

Position Number 00001234

Delegation Contents Find | View All First 1 of 3 Last

Effective Date 24/03/2017 Postdoctoral Fellow (Level A) Status Active

Delegation Profiles Find First 1 of 1 Last

*Profile Type *Profile ID Delegations + -

Individual Delegations Find | View All | [?] First 1 of 1 Last

Delegation ID	Cluster	Description	Legislative
1			<input type="checkbox"/>

Save | Return to Search | Notify | Add | Update/Display | Include History | Correct History

Description | Specific Information | Budget and Incumbents | **Delegation Assignment** | Delegation Holders



6. Employee delegation inquiry: looking up delegations held by an employee

1. Navigate to **Main Menu > Organisational Development > ANU Delegations > Employee Delegation Inquiry**
2. You can Inquire on delegations by searching on all of one of the following values; **Empl ID, Last name, First Name** or **Position Number**.

Employee Delegation Inquiry

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ Search Criteria

Empl ID: begins with 4443723

Empl Record: =

Last Name: begins with SMITH

First Name: begins with John

Payroll Status: =

Position Number: begins with 00000999

3. The employee Delegation Inquiry page will show the most current delegations owned by the individual:

Employee Delegation Inquiry

Empl ID: 4443723

Empl Record: 0 ANU Officer 8 (Administration)

Find | View All | First 1 of 1 Last

Delegation From: 20/02/2017 To: Delegation Type: Job/Position

Position Number: 00015654 Snr Consultant

Department: 22264 HR Systems

As Of Date: 27/03/2017

Delegation Profiles Find | First 1 of 1 Last

Profile Type	Profile ID	Delegations
BANDED	D6	Delegation Band 6

Individual Delegations Find | View All | First 1 of 1 Last

Delegation ID	Cluster	Description	Legislative
1 000166		Approve casual timesheets for general staff	<input type="checkbox"/>

[Return to Search](#) [Notify](#)



- To view delegations at a particular point in time, change the **As Of Date** in the corresponding field:

Employee Delegation Inquiry

Empl ID: 4443723
Empl Record: 0 ANU Officer 8 (Administration)

Delegation From: 20/02/2017 To: Delegation Type: Job/Position
Position Number: 00015654 Snr Consultant
Department: 22264 HR Systems
As Of Date: 26/03/2017

Delegation Profiles

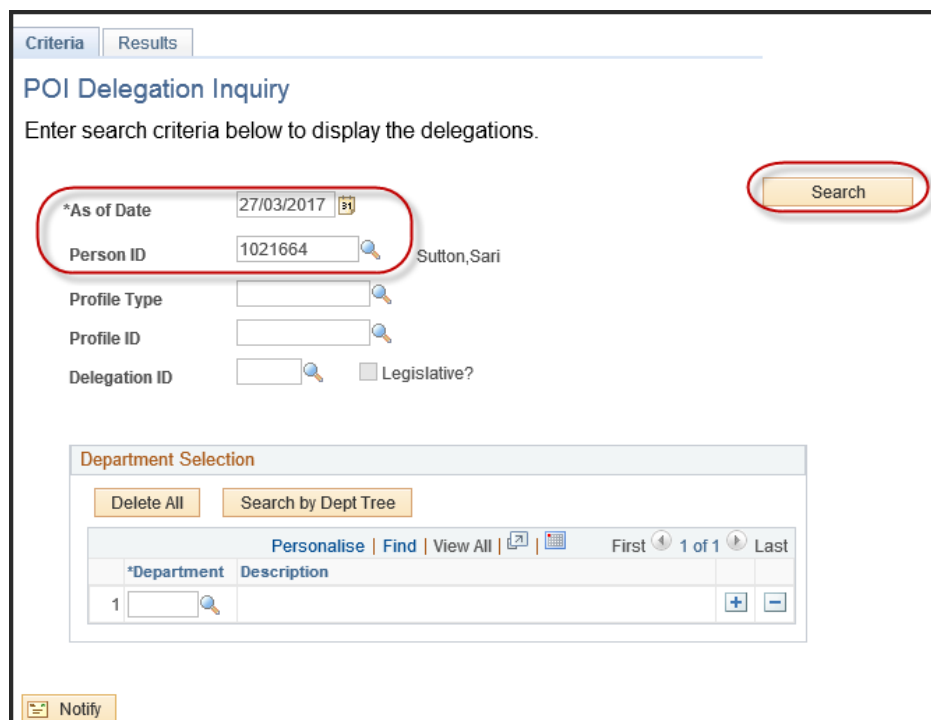
Profile Type	Profile ID	Delegations
BANDED	D6	Delegation Band 6

Individual Delegations

Delegation ID	Cluster	Description	Legislative
1			<input type="checkbox"/>

7. POI delegation inquiry: looking up delegations held by a POI (nee VaHA)

- 1 Navigate to **Main Menu > Organisational Development > ANU Delegations > POI Delegation Inquiry**
 - 2 You can Inquire on a POI's delegations at a particular point in time using As At Date and at least one of the following parameters: **Person ID, Profile Type AND Profile ID, Delegation ID** or **Department**.
- 2a. Delegation enquiry by Person ID:
Enter the date and the Person ID you wish to enquire on in the corresponding fields



Criteria Results

POI Delegation Inquiry

Enter search criteria below to display the delegations.

*As of Date

Person ID Sutton, Sari

Profile Type

Profile ID

Delegation ID Legislative?

Department Selection

Personalise | Find | View All | |

First 1 of 1 Last

*Department	Description
1 <input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>

- 2b. Delegation enquiry by Profile Type and ID, or Delegation ID:
Enter the **Profile Type AND Profile ID and/or Delegation ID** in the corresponding field/s, or use the magnifying glass to find the relevant Profile ID. Select **Search**.

POI Delegation Inquiry

Enter search criteria below to display the delegations.

*As of Date: 27/03/2017 [BT] Search

Person ID:

Profile Type: ACAD Academic

Profile ID: COLLDEAN College Dean

Delegation ID: 000065 Legislative?
 Approve results for courses

Department Selection

Delete All Search by Dept Tree

Personalise | Find | View All | First 1 of 1 Last

*Department	Description
1 <input type="text"/>	

2c. Delegation enquiry by Department

To obtain a list of delegates by department, enter the **Department** in the corresponding field under Department Selection, or search using the magnifying glass. You can also use the **Search By Department Tree** function.

POI Delegation Inquiry

Enter search criteria below to display the delegations.

*As of Date: 27/03/2017 [BT] Search

Person ID:

Profile Type:

Profile ID:

Delegation ID: Legislative?

Department Selection

Delete All Search by Dept Tree

Personalise | Find | View All | First 1 of 1 Last

*Department	Description
1 60100	ANU National Security College

- Once you search based on your criteria, the **POI Delegation Inquiry-Results** page will display the department and POI type information based on your search criteria:



Criteria Results

POI Delegation Inquiry - Results

Click 'Criteria' tab to perform another inquiry

As of Date: 27/03/2017
Person ID: 1021664

Personalise | Find | View All | First 1 of 1 Last

Department & POI Type Delegate Details

Department	Dept Description	POI Type	POI Type Description
1 60100	ANU National Security College	00030	Secondee

4. To view the details of the delegations, select the **Delegate Details** tab

POI Delegation Inquiry - Results

Click 'Criteria' tab to perform another inquiry

As of Date: 27/03/2017
Person ID: 1021664

Personalise | Find | View All | First 1 of 1 Last

Department & POI Type **Delegate Details**

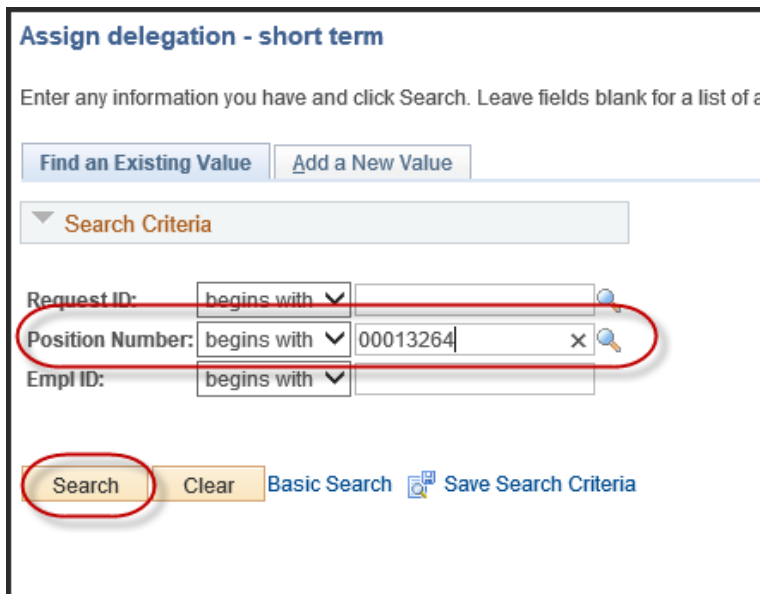
Person ID	Name	From	To	Profile Type	Profile ID	Profile Description	Delegation ID	Cluster	Cluster Description
1 1021664		20/02/2017	31/12/2017	BANDED	D6	Delegation Band 6			

SECTION B: HRMS ANU Delegations menu

Section B - HRMS ANU Delegations menu: use this to initiate, submit and action (authorise or decline) delegation requests to assign delegations to existing positions, assign short-term acting delegations, assign delegations to a POI, generate delegation extract and report, inquire on delegation assignment.

1. Assign delegations to short-term acting

- 1 Navigate to: **Main Menu > Organisational Development > ANU Delegations > Requests > Assign delgn to short-term acting**
- 2 Enter the **Position Number** against which you wish to assign a temporary delegate to and **Search**.



Assign delegation - short term

Enter any information you have and click Search. Leave fields blank for a list of a

Find an Existing Value **Add a New Value**

▼ **Search Criteria**

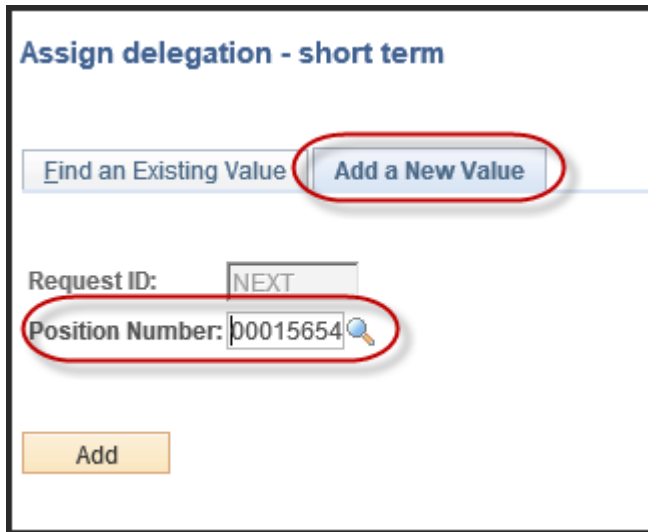
Request ID: begins with ▼ []

Position Number: begins with ▼ 00013264 [x] []

Empl ID: begins with ▼ []

Search **Clear** **Basic Search** **Save Search Criteria**

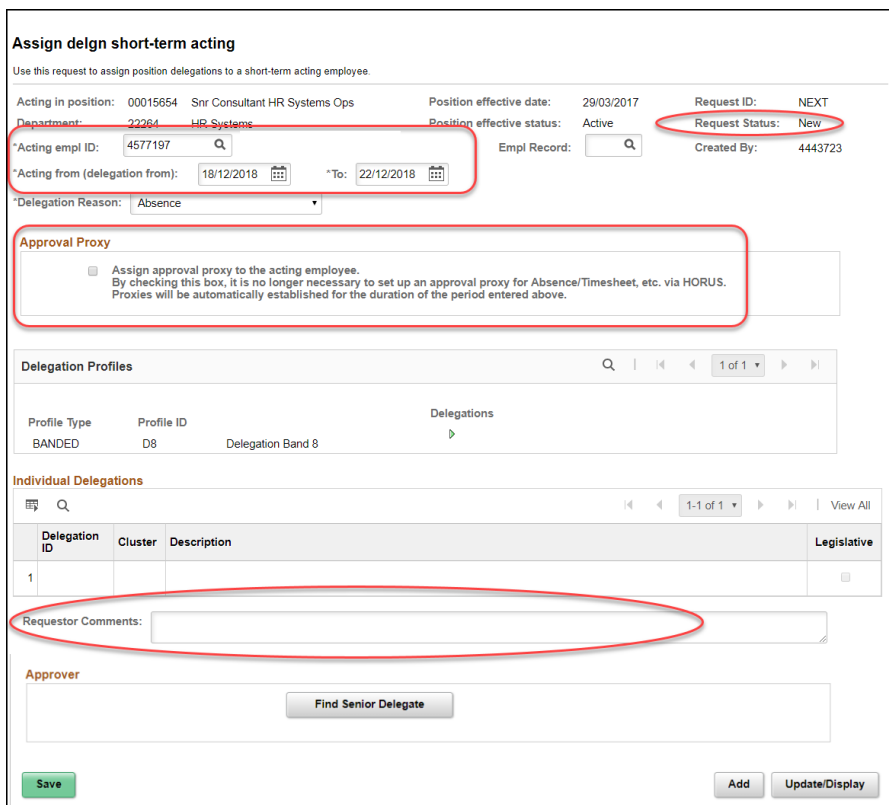
- 2a. If no results appear, select the **Add a New Value** tab and enter the **position number** you wish to assign short term delegations against in the corresponding field, or use the magnifying glass to find the required position number and select **Add**.



The screenshot shows the 'Assign delegation - short term' form. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these, there are input fields for 'Request ID:' with a dropdown menu showing 'NEXT' and 'Position Number:' with the value '00015654'. A magnifying glass icon is next to the Position Number field. At the bottom left, there is an 'Add' button.

3. On the **Assign delgn short-term acting** page, enter the acting employees ID in the **Acting empl ID** field and the dates in the **Acting from (delegation from)** and **To** fields. Add any relevant comments in the **Requestor Comments** field:

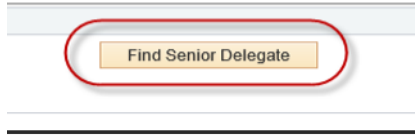
Note: The **Request Status** field will display as “new”



The screenshot shows the 'Assign delgn short-term acting' form. At the top, it says 'Use this request to assign position delegations to a short-term acting employee.' Below this, there are several fields: 'Acting in position: 00015654 Snr Consultant HR Systems Ops', 'Position effective date: 29/03/2017', 'Request ID: NEXT', 'Department: 22264 HR Systems', 'Position effective status: Active', and 'Request Status: New'. There are also fields for 'Acting empl ID: 4577197', 'Empl Record: [search]', and 'Created By: 4443723'. Below these, there are fields for '*Acting from (delegation from): 18/12/2018' and '*To: 22/12/2018'. There is a dropdown for '*Delegation Reason: Absence'. Below this, there is a section for 'Approval Proxy' with a checkbox 'Assign approval proxy to the acting employee. By checking this box, it is no longer necessary to set up an approval proxy for Absence/Timesheet, etc. via HORUS. Proxies will be automatically established for the duration of the period entered above.' Below this, there is a section for 'Delegation Profiles' with a table showing 'Profile Type: BANDED', 'Profile ID: D8', and 'Delegations: Delegation Band 8'. Below this, there is a section for 'Individual Delegations' with a table showing 'Delegation ID: 1', 'Cluster: [empty]', 'Description: [empty]', and 'Legislative: [checkbox]'. Below this, there is a field for 'Requestor Comments: [text area]'. Below this, there is a section for 'Approver' with a button 'Find Senior Delegate'. At the bottom, there are buttons for 'Save', 'Add', and 'Update/Display'.

The proxy functionality allows individuals to assign approval proxy's to acting employees at the point of assigning short term acting delegations in HORUS by checking a tick box within the form. Proxies will automatically be established for the acting period, removing the need to manually setup an approval proxy for absence and/or timesheet approvals.

- Select the **Find Senior Delegate** button to find the appropriate approver:



- The approver will appear at the bottom of the page. Select the relevant approver (where there are multiple approvers) and select the **submit for approval** button

Assign delgn short-term acting

Use this request to assign position delegations to a short-term acting employee.

Acting in position: 00015654 Snr Consultant HR Systems Ops Position effective date: 27/03/2017 Request ID: NEXT
 Department: 22264 HR Systems Position effective status: Active Request Status: New
 *Acting empl ID: 4577197 Empl Record: 0 Created By: 4443723
 *Acting from (delegation from): 28/03/2017 *To: 29/03/2017

Delegation Profiles Find First 1 of 1 Last

*Profile Type	*Profile ID	Delegations
BANDED	D6	Delegation Band 6

Individual Delegations Find | View All | 1 of 1 Last

Delegation ID	Cluster	Description	Legislative
1 000133	✓	Employ casual general staff	

Requestor Comments: Acting for incumbent whilst on leave

Approver

Find Senior Delegate Submit for Approval

Please select a Senior Delegate from the list and click Submit for Approval button

Approver ID	Approver Name	Department	Department Description
<input type="radio"/> 4263		22100	Office

Save Add Update/Display

- The page will display the completed form and the **Request Status** field will change to **submitted** and a **Request ID** will be generated. Note the request ID for future reference:



Assign delgn short-term acting

Use this request to assign position delegations to a short-term acting employee.

Acting in position: 00015654 Snr Consultant HR Systems Ops Position effective date: 27/03/2017 Request ID: 00000042
Department: 22264 HR Systems Position effective status: Active Request Status: Submitted
*Acting empl ID: 4577197 Empl Record: 0 Created By: 4443723
*Acting from (delegation from): 28/03/2017 *To: 29/03/2017

Delegation Profiles

Find First 1 of 1 Last

*Profile Type	*Profile ID	Delegations
BANDED	D6	Delegation Band 6

Individual Delegations

Find | View All | First 1 of 1 Last

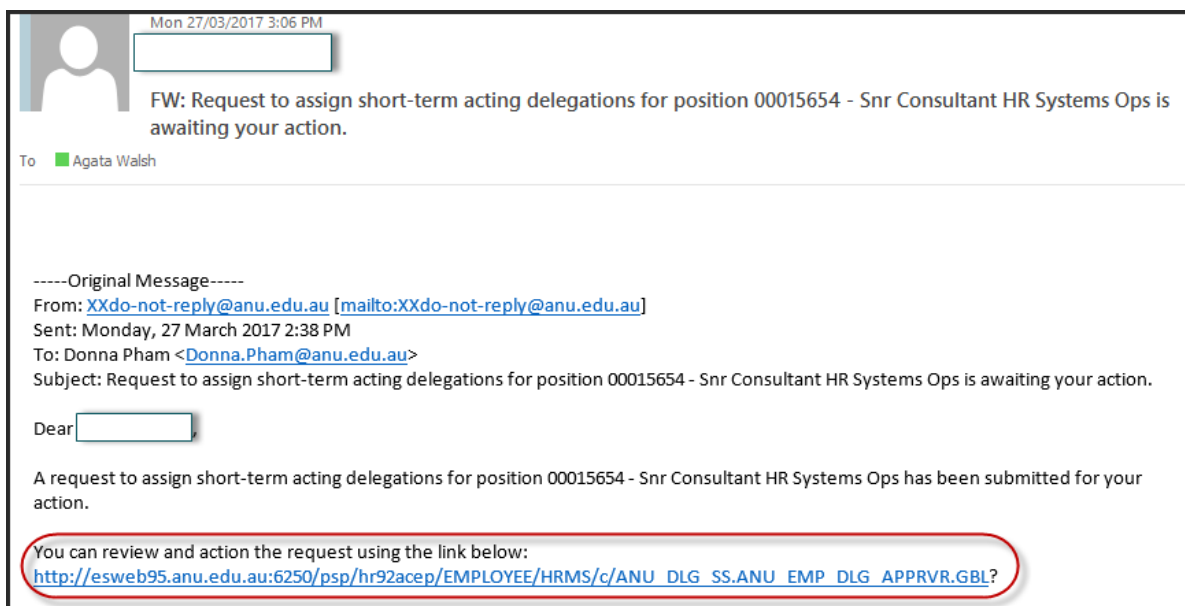
Delegation ID	Cluster	Description	Legislative
1 000133	▼	Employ casual general staff	<input type="checkbox"/>

Requestor Comments: Acting for incumbent whilst on leave

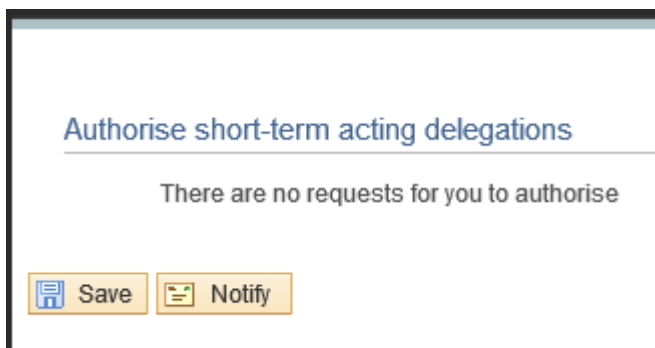
Approver
426

2. Authorise short-trm acting dlgn

1. A senior delegate can authorise a short-trm acting delegation by accessing the request via a link in an email, or navigating to **Authorise short-trm actng dlgn** in the HRMS:
 - a. Navigating to the approval request using the link in automatic email notification: Once a short-term acting delegation request has been submitted, the senior delegate will receive an email containing a link allowing them to review and action the request:



- b. Navigating to the approval form using HORUS: Navigate to: **Main Menu > Manager Self Service > ANU Delegations > Authorise short-trm actng dlgn.**



2. The senior delegate will be able to review the delegation request and either **Authorise** or **Decline** the request by selecting the corresponding options. A reason will need to be provided if the request is declined.



Authorise delgn short-term acting

Acting employee: Louise Acting empl ID: 4577197 Empl Record: 0 Request ID: 00000042
Department: 22264 HR Systems Created By: Walsh

The above short-term acting employee undertakes delegation associated with position 00015654 - Snr Consultant HR Systems Ops for the period between 28 March 2017 and 29 March 2017. The delegations are:

Delegation Profiles Find First 1 of 1 Last

*Profile Type	*Profile ID	Delegations
<input type="text" value="BANDED"/>	<input type="text" value="D6"/>	Delegation Band 6

Individual Delegations Find | View All | [?] First 1 of 1 Last

Delegation ID	Cluster	Description	Legislative
1 000133	<input type="text"/>	Employ casual general staff	<input type="checkbox"/>

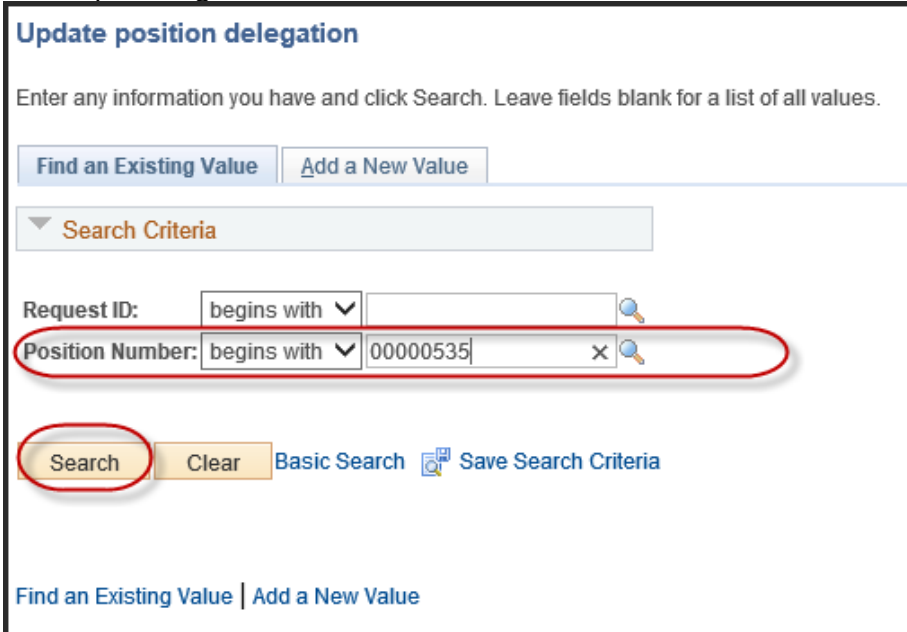
Reviewer Comments:

*I authorise the assignment and exercise of the delegations specified above to this staff member

Please provide a reason if declining

3. Update position delegations

- 1 Navigate to: **Main Menu > Organisational Development > ANU Delegations > Requests > Update Position Delegation**
- 2 Enter the **Position Number** that you want to assign delegations to in the corresponding field. Select **Search**



Update position delegation

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ **Search Criteria**

Request ID: begins with [] []

Position Number: begins with [] 00000535 []

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

- 2a. If no results appear, select the **Add a New Value** tab and enter the **position number** you wish to assign delegations against in the corresponding field. Select **Add**.

Update position delegation

Find an Existing Value | **Add a New Value**

Request ID: NEXT

Position Number: 00000535

Add

Find an Existing Value | Add a New Value

- On the **Assign delegation to position** page, enter the **Effective Date** and **Profile Type, Profile ID, Delegation ID** and **Cluster** (where relevant), in the corresponding fields. Add any relevant comments in the **Requestor Comments** field:

Note: The **Request Status** field will display as “new”

Assign delegation to position

Use this request to assign delegations to a position or to update delegations held by a position.

Position Number: 00000535 ANU Officer 8 (Administration) Position effective date: 28/03/2017 Request ID: NEXT

Department: 22264 HR Systems Position effective status: Active **Request Status: New**

*Effective date of assignment: 29/03/2017 Created By: 9609746

Delegation Profiles Find First 1 of 1 Last

*Profile Type: BANDED *Profile ID: D6 Delegation Band 6

Individual Delegations Find | View All | First 1 of 1 Last

Delegation ID	Cluster	Description	Legislative
1			

Requestor Comments: New role requirement

Approver

Find Senior Delegate

Save Add Update/Display

- Select the **Find Senior Delegate** button to find the appropriate approver:



The screenshot shows the 'Delegation Profiles' form. At the top, there are search fields for '*Profile Type' (set to 'BANDED') and '*Profile ID' (set to 'D6'). Below this is a table for 'Individual Delegations' with one row containing '1'. A text box for 'Requestor Comments' contains 'New role requirement'. At the bottom, under the 'Approver' section, a button labeled 'Find Senior Delegate' is circled in red.

5. The approver will appear at the bottom of the page. Select the relevant approver (where there are multiple approvers) and select the **submit for approval** button

The screenshot shows the 'Assign delegation to position' form. It includes fields for 'Position Number' (00000535), 'Department' (22264 HR Systems), and '*Effective date of assignment' (29/03/2017). Below these are search fields for '*Profile Type' and '*Profile ID'. The 'Approver' section contains a 'Find Senior Delegate' button and a 'Submit for Approval' button, both circled in red. Below the buttons is a table with the following data:

Please select a Senior Delegate from the list and click Submit for Approval button			
Approver ID	Approver Name	Department	Department Description
<input type="radio"/> 4263		22100	Office

At the bottom of the form are 'Save', 'Add', and 'Update/Display' buttons.

6. The page will display the completed form and the **Request Status** field will change to **submitted** and a **Request ID** will be generated. Note the request ID for future reference:



Assign delegation to position

Use this request to assign delegations to a position or to update delegations held by a position.

Position Number: 00000535 ANU Officer 8 (Administration) Position effective date: 28/03/2017 Request ID: 00000063
Department: 22264 HR Systems Position effective status: Active Request Status: Submitted
*Effective date of assignment: 29/03/2017 Created By: 9609746

Delegation Profiles				Find	First	1 of 1	Last
*Profile Type	*Profile ID	Delegation Band 6	Delegations				
BANDED	D6						

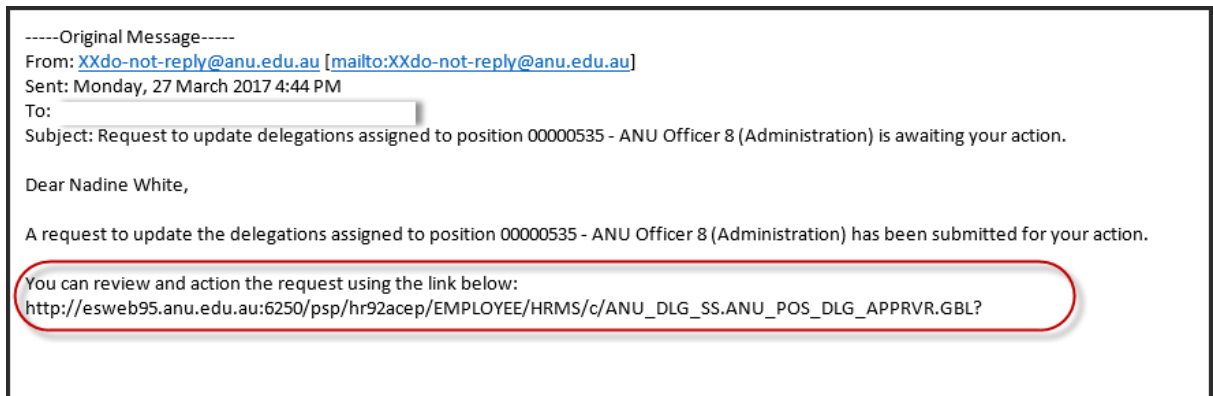
Individual Delegations				Find	View All	First	1 of 1	Last
Delegation ID	Cluster	Description	Legislative					
1								

Requestor Comments: New role requirement

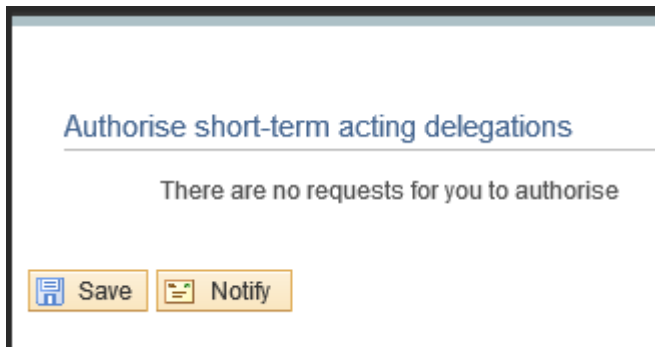
Approver
42

4. Authorise Position Delegations

1. A senior delegate can authorise a delegation by accessing the request via a link in an email, or navigating to **Authorise Position Delegation** in the HRMS:
 - a. Navigating to the approval request using the link in automatic email notification:
Once a delegation request has been submitted, the senior delegate will receive an email containing a link allowing them to review and action the request:



- b. Navigating to the approval form using HORUS:
Navigate to: **Main Menu > Manager Self Service > ANU Delegations > Authorise Position Delegation.**



2. The senior delegate will be able to review the delegation request and either **Authorise** or **Decline** the request by selecting the corresponding options. A reason will need to be provided if the request is declined.



Authorise delegations assigned to a position
Use this form to authorise delegations assigned to a position.

Request ID: 00000038 Created By: [redacted]

Position 00000535 - ANU Officer 8 (Administration) in Department 22264 - HR Systems has the following delegations added to, or amended, effective from 22 February 2017:

Delegation Profiles Find First 1 of 1 Last

*Profile Type	*Profile ID	Delegations
[redacted]	[redacted]	[redacted]

Individual Delegations Find | View All | [redacted] First 1 of 1 Last

Delegation ID	Cluster	Description	Legislative
1 000221		Purchase goods and services (excluding the signing of related contracts) within available project funds for pre-approved Capital project contracts	<input type="checkbox"/>

Requestor Comments: [redacted]

*I authorise the assignment and exercise of the delegations specified above to this Position

Please provide a reason if declining
[redacted]

- Once the Senior delegate approves the delegation for a position, the incumbent of the position will be notified via email.

-----Original Message-----
From: XXdo-not-reply@anu.edu.au [mailto:XXdo-not-reply@anu.edu.au]
Sent: Monday, 27 March 2017 4:55 PM
To: [redacted]
Subject: For your information – changes to delegations assigned to position 00000535 - ANU Officer 8 (Administration).

Dear [redacted]

This is to inform you that the delegations assigned to position 00000535 - ANU Officer 8 (Administration) have been amended, effective from 28-Mar-2017.

End of guide