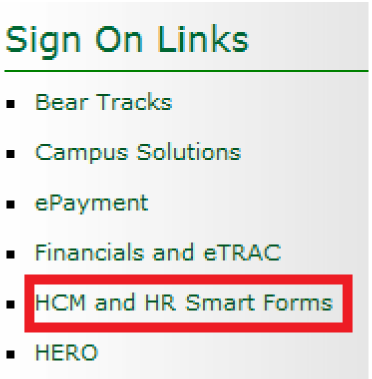
Learning Summary – Project Manager Delegation Smart Form

HR Smart Forms are located in the PeopleSoft Human Capital Management Production environment. Select the **HCM and HR Smart Forms** link on the AIS website at www.ais.ualberta.ca



Help Resources:

- For assistance with your **CCID/password**, contact **AICT** at 780.492.9400
- For PeopleSoft Support, contact
  AICT Helpdesk
  helpdesk@ualberta.ca
  780.492.9400
- PeopleSoft is available Monday through Saturday from 7:30 am–7:00 pm MST

Access to the PeopleSoft Databases:

- You must use your CCID and Password to log on to the PeopleSoft databases.

Create new Project Manager Delegation Smart Form

Use to maintain delegates from your Project Team to approve HR Smart Forms on your behalf

Navigation: Department Self Service > eForms Delegation Home Page > Project Manager Delegation Home Page > Submit a new Project Delegation Form

Step 1 – Project Selection	Click [▼] to view the Projects you are the Project Manager for. Select the Project/Grant you wish to delegate the authority to approve HR Smart Forms. If a Project/Grant is not appearing on the list please contact the RSO for assistance.
Step 2 – Project Delegates	This section of the form shows who you have previously delegated authority to approve HR Smart Forms and allows you to change delegates. If there are no delegates appearing in this section, you have not delegated authority to anyone on your Project Team.
Step 3 – Add Delegates	In the Project Delegates section click [▼] to view the available Team Members on the selected Project Select who on your Project Team you wish to delegate approval of Smart Forms to.
Step 4 – Delete Delegates	If you wish to Revoke the delegation to a Team Member click the check box under the Revoke heading. Revoke? ☑ Click [Next >>] to proceed to the next page.
Step 5 – Finalize Form	This is the final page prior to submitting the form for approval. Enter any comments you want on this page in the comments section. Click [Submit] to submit to form. You will be asked if you are sure that you want to submit the form. Click [Yes] to proceed. Click [No] if you wish to return to the form to make any changes or to review your entries.
Step 6 – Form Submission	This final page advises you the form has been submitted and where it has been forwarded to. • Originators of the form will receive email notification for each step in the process. • Approvers will receive email notification when a form requires approval. Approvers can recycle the form back to the originator if changes are required.

View a Project Delegation Form

Use to view any forms that that have been entered to delegate HR Smart Forms authority

Navigation: Department Self Service > eForms Delegation Home Page > Project Manager Delegation Home Page > View a Project Delegation Form

Employee Search	On the **View Project Delegate** page, enter any of the following information that you have.

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	• eForm Form ID# If you know the Delegation form id # enter it here • Project Grant Id # • Project Manager's CCID Click << Search to retrieve the Delegation Form(s) from the database.
Step 1 – Select a form	If there is only one form returned, it will open automatically. If there is more than one form, a list will be produced. From the list select the form you wish to view by double clicking on any of the fields. If no records are returned it means the system did not find any forms matching the criteria you entered.
Step 2 – View Delegates	You can view the form and the associated transactions that were performed. For example you can see who you delegated or revoked authority to on this form. The last column labeled **"Action Requested".** will show if you **Granted** authority to the Project Team Member or **Revoked** authority. If you wish to see the form History Page Click Next >> to proceed to the next page If you wish to exit the form Click Close to exit out of the form
Step 3 – Review Form History	The history of the form is useful for tracking or troubleshooting: • Original Operator – Who started the form along with the date and time • Last Operator – Who last approved the form along with date and time • Next Approver (if any) – Who is the next person that needs to approve the form. It also has a transaction log that shows date, role name, user id, user name, form action and form status which again are useful if you need to track or troubleshoot a form. Click Next >> If you want to check for any form errors **Or** Click << Previous to return to the View Delegates Page
Step 4 – Review Error History	This final page shows any form errors that may have occurred during the processing of the form. Click << Previous to return to the Form History Page **Or** Click Close to exit out of the form
Approve a Project Delegation Form Navigation: Worklist .> Worklist >	Used to approve Project Manager Delegation forms started on your behalf
Accessing your Worklist	When a Delegation form is processed on your behalf it will be routed to your worklist for approval. There are two ways to access your worklist. 1. Click the link embedded in the email you received notifying you a form has been routed to you for approval. Once you enter your CCID and password you will be taken directly to the form requiring approval. 2. Sign on to the HCM PeopleSoft application using your CCID and password. a) Click on the Worklist menu item on the left hand side

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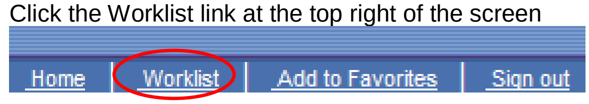
	 b) Click on Worklist again  OR c) Click the Worklist link at the top right of the screen  The list of forms that require your approval will be displayed. Select a form by clicking on the blue link.
Step 1 – Review the Form	Review the form to ensure that the project members that you want to delegate the approval of HR Smart forms to are listed and have the Grant access listed. If you are removing authority from project members the Requested Action will be Revoke Project members that already have authority delegated to them will have the Requested Action of Delegated.
Step 2 – Approve, Recycle or Reject	Click Approve if you authorize the changes identified on the form. Click Recycle if you have questions on the changes identified on the form. You must enter the reason you are recycling the form in the comments section. Recycled forms go back to the originator. Click Reject if you do not want to approve delegations made in the form. This will stop all processing of this form. If you click on this button by mistake a new form will need to be completed. **Use Recycle if you have any questions about the form or if changes are required**.
Step 3 – Finalize form	You will be asked if you are sure that you want to submit the form. Click Yes to proceed. Click No if you wish to return to the form to make any changes or to review. Once a form has been approved no changes can be made to it.
Step 4 – Form Submission	This final page advises you the form has been submitted and where it has been forwarded to. Originators of the form will receive email notification for each step in the process.