# Learning Summary – Project Manager Delegation Smart Form

## HR Smart Forms
- Select the **HCM and HR Smart Forms** link on the AIS website at [www.ais.ualberta.ca](http://www.ais.ualberta.ca)

## Sign On Links
- Bear Tracks
- Campus Solutions
- ePayment
- Financials and eTRAC
- **HCM and HR Smart Forms**
- HERO

## 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 \( \square \) 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 \( \square \) 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 \( \square \) 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 \( \square \) to submit to form.

You will be asked if you are sure that you want to submit the form.

Click \( \square \) to proceed. Click \( \square \) 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 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.
### 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

**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**
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.