

Assigning a Delegate

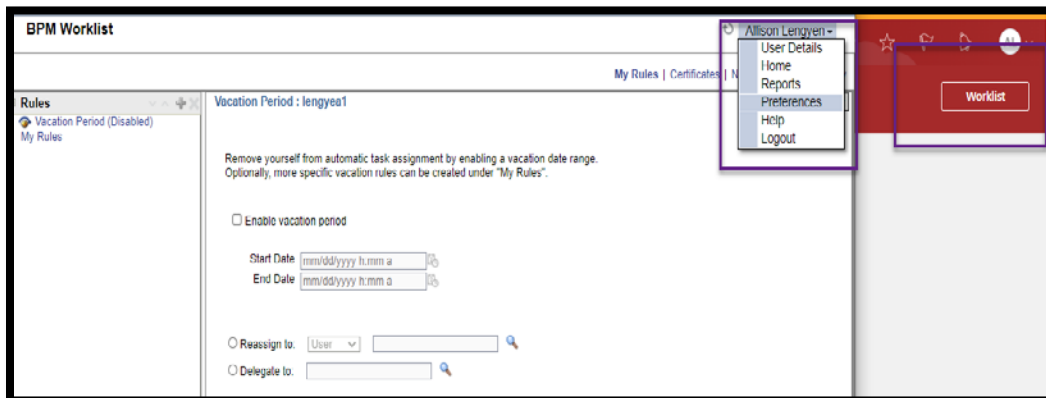
Assigning a delegate in Oracle Cloud requires that you first set up a rule. A rule tells the system what task(s) you want to delegate, for how long you want to delegate, and to whom you want to delegate to.

The following steps will guide you through the process of setting up a delegation rule.

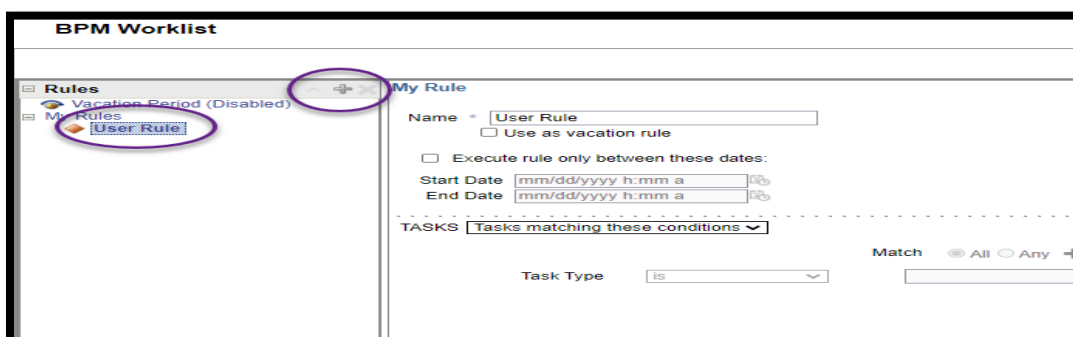
1. To assign a delegate approver, click on the Bell Icon located in the upper right side of your screen



2. Click on **Worklist** button then click on your **name** in the upper right corner of the BPM Worklist screen. From the dropdown menu, select **preferences**.



3. From left side panel, click on **My Rules** then click on "+" located on the top of side panel



- Now create the delegation rule. Enter Rule **Name** such as *Absence Request Approver*, Enter **Dates** the Rule should remain active, then **Search** for the task you want to Delegate.

My Rule

Name * 1

Use as vacation rule

Execute rule only between these dates:

Start Date 2

End Date 2

TASKS

Match All Any +|-

Task Type 3

- From the Search bar, enter **%Absence** to locate all of the Absence related tasks. Select the task **Absence Approver** and click **Ok**. A “%” is known as a wildcard in Oracle and is used to search for any tasks containing the word you are searching for.

My Rule

Name *

Use as vacation rule

Execute rule only between these dates:

Start Date

End Date

TASKS

Match All Any +|-

Task Type

Task Type Browser

Search

Task Type	Process Name	Description	Outcomes
AbsenceApprovalSer...	HcmEmploymentAbsenc...		Ok
AbsenceCaseHuman...	HcmEmploymentAbsenc...		Approve, Reject
AbsenceCatchAllExc...	HcmEmploymentAbsenc...		Ok
AbsenceMultiAssign...	HcmGblAbsencesRecor...		Approve, Reject
AbsencePlanBalance...	HcmGblAbsencesRecor...		Approve, Reject
AbsencePlanBalance...	HcmGblAbsencesRecor...		Ok
AbsencePlanBalance...	HcmGblAbsencesRecor...		Approve, Reject
AbsencePlanBalance...	HcmGblAbsencesRecor...		Ok
AbsencesApproval	HcmEmploymentAbsenc...		Approve, Reject
AbsencesApprovalsT...	HcmGblAbsencesRecor...		Approve, Reject
AcknowledgmentRej...	PrcPoApprovalComposite		Approve, Reject
ActivateQuotaPlanFyi	SalesTerrMgmtQuotasPI...		Ok
ActivityManagement	FinCollActivityManaqem...		Complete

OK Cancel

6. Next, select the delegate name from the Action section. Click the button next to **Delegate to:** then click **search button** to search for the appropriate user then select **OK** from bottom of screen.

The screenshot shows the 'My Rule' configuration page with an 'Identity Browser' dialog box open. The dialog has a search bar with 'Users' selected. Below the search bar, the 'Advanced' search criteria are set to First Name: Erik and Last Name: Lopez. A search button is visible. Below the search bar is a table of search results:

ID	First Name	Last Name	Email	Title	Manager	Orgar
Select	Erik	Lopez				
lopez	Erik	Lopez	lopeze@tcnj.e...		ricketts	

At the bottom of the dialog are 'OK' and 'Cancel' buttons. In the background, the 'My Rule' page shows the 'Name' field set to 'Time Card Approver', the 'Execute rule only between these dates' checkbox checked, and the 'ACTION' section with 'Delegate to:' selected.

7. Finally, once you have delegated the appropriate task for the correct number of days to the appropriate person, select **Save** from the top of the screen.

The screenshot shows the 'My Rule' configuration page with the 'Save' button circled in purple. The rule name is 'Absence Request Approver', and the dates are 11/05/2020 11:56 AM to 11/06/2020 11:56 AM. The 'Save' button is located at the top right of the page.