How to Delegate Transactions

Navigation: Self Service>Manage Delegation

Select “Create Delegation Request”

Select Create Delegation Request to choose transactions to delegate and proxies to act on your behalf.

Enter in “From and To Date” of delegation. Future dates are acceptable but will not allow past dates. Delegation ends midnight of the To Date. Then select “Next”

Select the “Transaction” that you want to delegate by checking the box next to the item. If delegating all, you may use “Select All”. Then select “Next”

Delegation is by type of transactional activity.

Select an Employee by clicking on the circle by the “Name”. If you do not see the person you want listed, use the “Search by Name” feature to locate. Then select “Next”.

You will be presented with a review page, validate this is correct and select “Submit” or if not, may cancel or go back to previous page Once submitted a confirmation page will appear.

To end a proxy early go to the Manage Delegation page, select “Review my Proxies”, select item and “Revoke”.

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