DELEGATIONS OF AUTHORITY
DelegationPoint User Guide

A **delegation** is the formal authority or power to do something - a specific task, function or duty. Delegations are designed to ensure these responsibilities are passed to the appropriate level so that staff can carry out their duties efficiently and effectively.

University delegations are detailed in the Delegations of Authority Document. A range of standing delegations are provided to senior staff members in relation to the position they hold. Where indicated in the Document, specific functions may be sub-delegated to nominated staff members who undertake the task or duty as an Agent of the senior staff member (the Delegate).

DelegationPoint is the online system used to manage University Delegations. The system provides automated workflow around the request and approval process and provides individuals with the ability to view their own delegations and any sub-delegations they may have provided (if they are a level 3 or 4 Manager).

The information below provides step-by-step instruction on how to request the various types of sub- delegations. If you require further assistance or have a query, please refer to the FAQs or contact Jodie Banner (Risk Management Office) on x81854.

Requestor: Staff member who completes and submits a delegation request (may be the Agent or Delegate themselves)

Delegate: The Level 4 or above Massey Manager who can sub-delegate specific tasks and functions to an Agent

Agent: Staff member with formal authorisation to perform specific tasks or duties on behalf of the delegate

PRIMARY DELEGATION

A Primary delegation provides the Agent with all of the GL accounts associated with the named Delegate's Budget Centre(s). The Delegate sets the operating expenditure (OPEX) limit and can select an end date.

Requestor:

(1)   Select **Request a Primary Delegation** from the options to the right hand side of the Home Page.
(2)   Select the **Delegate** (Level 4 Manager or above):

Type in the Delegate's *Last name, First name* and then use the people check to confirm 🔍✓ , or browse by last name 📖, as you would with your outlook contacts list. Please ensure you select the correct staff member by checking the associated email address.

A list of the Delegate's General Ledger (GL) codes will be populated into the **General Ledger** drop down box. The Agent will receive authority for all of these codes (and all associated PR, RM and NP accounts), if the delegation is approved by the Delegate.

(3)   Select the **Agent** (same process as above)
(4)   Select an **OPEX** ($) amount from the drop down box. (This is a per transaction limit, and is only for operating expenditure. Delegations for capital related (CAPEX) purchases are restricted.)
(5)   Enter an **End date** for the delegation, or leave as the default 31/12/2020
(6)   **Submit** for approval

Delegate:

The Delegate will receive an email notifying them of the request for a delegation. They can approve, decline or approve with conditions. (If they add conditional comments the Agent will receive an email and they will then have to confirm they understand and accept the sub-delegation in accordance with these conditions).

Agent:

If the Requestor is not the Agent, and the Delegate approves or approves with conditions, the Agent will receive an email asking them to accept or decline the delegation.

SECONDARY DELEGATION

A Secondary delegation is used where an Agent must only have access to a specific PR, RM or NP account within the Delegate's Budget Centre. The Delegate sets the operating expenditure (OPEX) limit and can select an end date.

Requestor:

(1) Select **Request a Secondary Delegation** from the list of options to the right side of the Home Page.
(2) Select the **Delegate** (Level 4 Manager or above):

Type in the Delegate's *Last name, First name* and then use the people check to confirm 👤✓ , or browse by last name 📖 , as you would with your outlook contacts list. Please ensure you select the correct staff member by checking the associated email address.

(3) Select the **Agent** (same process as above)
(4) Select the appropriate **OPEX** dollar amount. (Please note this will be per transaction, and is only for operating expenditure. Delegations for capital related (CAPEX) purchases are restricted through the RFA process and only entered by specific individuals.)
(5) Type in the nominated PR, RM or NP account for which the delegation will apply (please note one account code per delegation request)
(6) Enter an **End date** for the delegation, or leave as the default 31/03/2020
(7) **Submit** for approval

Delegate:

The Delegate will receive an email notifying them of the request for a delegation. They can approve, decline or approve with conditions. (If they add conditional comments the Agent will receive an email and they will then have to confirm they understand and accept the sub-delegation in accordance with these conditions).

Agent:

If the Requestor is not the Agent, and the Delegate approves or approves with conditions, the Agent will receive an email asking them to accept or decline the delegation.

CREDIT CARD DELEGATION

A Delegation must be given for a staff member to be issued with a University Credit Card, enabling them to procure goods and/or services for University business purposes only.

Requestor:

(1) Select **Request a Credit Card Delegation** from the list of options to the right side of the Home Page.
(2) Select the **Delegate** (Level 4 Manager or above)

Type in the Delegate's *Last name, First name* and then use the people check to confirm 👤✓ , or browse by last name 📖 , as you would with your outlook contacts list. Please ensure you select the correct staff member by checking the associated email address.

(3) Select the **Agent** name (same process as above)
(4) Enter an **End date** for the delegation, after which time the card will be cancelled, or leave as the default
(5) **Submit** for approval

Delegate:

The Delegate will receive an email notifying them of the request for a delegation. They can approve, decline or approve with conditions. (If they add conditional comments the Agent will receive an email and they will then have to confirm they understand and accept the sub-delegation in accordance with these conditions).

Please note that additional information pertaining to the actual card, such as monthly limit, name on card, default account etc. needs to be completed on the Credit Card Application form. This information is not as part of the delegation request.

Agent:

If the Requestor is not the Agent, and the Delegate approves or approves with conditions, the Agent will receive an email asking them to accept or decline the delegation.

HUMAN RESOURCES DELEGATION

The specific HR delegations able to be sub-delegated may only be sub-delegated to an Agent who has staff management responsibilities. The accountability for any delegation sub-delegated to an Agent remains with the Delegate.

Requestor:

(1) Select **Request an HR Delegation** from the list of options to the right side of the Home Page.
(2) Select the **Delegate** (Level 4 Manager or above)

Type in the Delegate's *Last name, First name* and then use the people check to confirm , or browse by last name , as you would with your outlook contacts list. Please ensure you select the correct staff member by checking the associated email address.

(3) Select the **Agent** name
(4) Select the appropriate HR delegation to be delegated, or complete the Other field (If completing the Other field, please ensure the sub-delegation is listed in section 3 of the Delegations Document, and is able to be sub-delegated. Any requests not contained in section 3, will be declined.)

(Please note: these functions shall not be sub-delegated to a staff member who does not have staff management responsibilities. The accountability for any delegation which is sub-delegated remains with the specified Delegate. Please refer to the Delegations of Authority Document section 3).

Delegate:

The Delegate will receive an email notifying them of the request for a delegation. They can approve, decline or approve with conditions (if they add conditions the Agent will receive an email and they will then have to confirm they understand and agree to exercise the sub-delegation in accordance with these conditions).

Agent:

If the Requestor is not the Agent, and the Delegate approves or approves with conditions, the Agent will receive an email asking them to accept or decline the delegation.

OTHER DELEGATION

Please refer to Delegations of Authority Document to confirm that the Delegation requested can be sub-delegated. Any request not specifically contained in this Document will be declined.

The Delegations of Authority Document explicitly states where a delegation may be sub-delegated. If the sub-delegation required does not fall within the Primary, Secondary, Credit Card or HR delegation categories, please select **Other Delegation** from the list of options to the right side of the Home Page.

You will need to refer to the Delegations of Authority Document when completing this request, and ensure you reference back to the appropriate section of the document. For example: *2.3.4: Research and Consultancy Contract Approvals.*

Any request for a sub-delegation which is not outlined in the Document will be declined.