

## Manager Self Service: Delegate Manager Self Service Entry

This guide will help you use Manager Self Service to give Manager Self Service Delegated access to a designated user

### Setting up a new delegated user:

1. Click on 'Delegate Manager Self Service Entry' from the Manager Self Service menu.
2. The 'Delegate Manager Self Service: Special Information' screen will be shown. To set up a new delegated user, select the 'Add' button.
3. This will take you to the 'KCC MSS Delegated Access' screen. Complete the required fields:
  - 'My OAN' - if you have more than one assignment (role with KCC) select the relevant OAN from the drop down list. This should be the management assignment that you are allowing delegated access for.
  - 'Delegated User' - enter the name of the person that you want to grant delegated access to. Insert the person's surname followed by % and their forename i.e. Surname%Forename. Select the 'magnifying glass' icon. A 'Search and Select list of values' screen will appear, select the relevant person and click on 'Quick Select.' The person's name will be displayed in the 'Delegated User' box.
  - 'Start Date' - this will be the date that you want the person's delegated access to start from. It will default to today's date, so amend this if required by using the calendar icon.
  - 'End Date' - you can leave this field blank. If you wish to enter a date that the person's delegated access should end after select the date by using the calendar icon.
4. Once you have entered the required details click on 'Apply'.

### Special Information screen:

You will be returned to the special information screen. The details you have entered will be displayed and the status of the row will say 'New'.

If you need to amend any details select the row and click on 'Update'. You will be returned to the 'Delegated access' screen and can make and apply the required changes.

Note. You must only add and submit a request for one person at a time. If you need to grant access to more than one person, you must not include them within this transaction. You must submit a separate request for each person.

Once you are happy with the details on the Special Information screen click on 'Next'.

## Review and Submit:

A review and submit page will display the delegated user information you have proposed. If you need to amend this, select 'Back' to return to the 'Special Information' screen and amend the details as required.

In the Approvers section, the delegated user you are proposing will be listed as an approver. They will need to approve your proposal in order for it to be progressed.

At this point, if required, you can add an 'Adhoc Approver'. See the guidance below on how to do this.

Once you are happy with the details, select 'Submit'.

## Adding an Adhoc Approver:

If you require someone in addition to the delegated user to approve this proposal, you need to add them as an additional approver. Do this by selecting the '+' icon next to 'Add Adhoc Approver' on the 'Review and Submit' page. Search for their name by typing Surname%Forename. Select 'Add'. This approver will now be added.

Note. Adding an adhoc approver will not replace the need for the delegated user to approve the access you have proposed.

## Confirmation:

Upon selecting 'Submit' a confirmation screen will appear. Your proposal will be sent to the delegated user (and any adhoc approvers if you have added these).

You will be notified once the proposal has been approved.

An FYI (for your information) notification will then be automatically sent to the OBS Team (OBS Approver). This team will give the Manager Self Service Delegated Access responsibility to the delegated user and advise them when this has been done.

## Updating details for an existing delegated user:

You can amend details for an existing delegated user, for example, change or input an end date to their access:

1. Select the delegated user in the 'Delegate Manager Self Service Entry: Special Information' screen and click on 'Update'.
2. You will be taken to the 'KCC MSS Delegated Access' screen. Make the required changes and click on 'Apply'.
3. You will be returned to the Special Information screen. The status of the row will say 'Updated' and the new details will be displayed.
4. Once you are happy with the details click on 'Next'.
5. You will be taken to the review screen. A blue dot will indicate any proposed changes. The Approvers section shows that an FYI notification will be sent to the OBS Approver, so that they can make any changes to the delegated user's access.
6. Once you are happy with the details, select 'Submit'.

Note. No notification to the delegated user will be automatically sent, so use the add adhoc approver tool if required.

Note. You must only update details for one delegated user at a time. If you need to update another user's details, you cannot do this within this transaction. You must update and submit these details in a separate request.

## Guidance:

By giving Manager Self Service Delegated Access to a user, you and they are agreeing that they will have access to potentially confidential information about members of staff.

Please ensure that you and the delegated user have read the Manager Self Service Delegated Access general guidance document and that the delegated user is aware of their responsibilities when using this tool.

Quick guides for the tools available to a delegated user are held on the Manager Self Service Delegated Access KNet page and on the Self Service remote access guidance page.

## Help and Support:

Further information on this tool is available on the Manager Self Service Delegated Access KNet page.