Deputy rules

The deputy rules allow role deputies to be defined who are able to process requests. The deputy rules can be used while role holders are absent (temporary deputisation), or they can be set up permanently. In the latter case the deputies receive all the requests that the role holder also receives for processing, and can thereby relieve them.

The automatic determination of a possible deputy upwards along the competence path can be limited by an organisational level (for example in the case where a chairman of the board should not receive time correction requests from an employee).

Determining a deputy

Deputies can be defined in the following ways:

- decentrally > via the user
- the system parameter PoOptions "allow user deputy" must be set to TRUE
- centrally > via a role with ranking 2
  The deputy is defined via the role, by means of the **ranking** (1. = superior, 2 = deputy, 3, 4 = if several people are defined as deputies, the system determines who receives a request for processing).

In addition, every role holder can determine in their **personal settings** whether they want a deputy or not. It is activated in the personal settings with the parameter "My deputy may approve on my behalf".
This parameter affects all requests submitted from the moment of activation. In addition to the role holder, all downstream role holders (in so far as they are deputies according to the deputy rules) are written into the requests as deputies.
In this context the **search direction within the role** must currently also be observed:

- **upwards**
  The search for a deputy is carried out upwards in the organisational chart (this continues until a deputy has not activated deputisation)
- **downwards**
  The search for a deputy is carried out downwards in the organisational chart (likewise continued until someone has not activated deputisation)
- **none**
  The search for a deputy is limited to the user's own department or group.

Deputies can be determined **independently of department membership**, i.e. employees of other groups or departments can equally be designated as deputies. If several deputies are defined, the system determines which of them receives the request for processing first.

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Caution: if everyone has set the deputy rules to **Yes**, the request is displayed to everyone !

If one of the role holders starts processing a workflow request, the activity is assigned to him/her; from that moment on the other role holders no longer have access to the request.