

## 1. Setting up and managing delegations

Attain will allow you to manage all aspects of your organisation's delegations. This includes:

- Keeping track of all organisational positions with delegated authority.
- Printing individual *Certificates of Delegation*.
- Print an up-to-date Delegations Register at any time.
- Edit, amend and remove delegations simply and easily.

1. From the Home Page, select the *Delegations* icon
2. Before you can begin to enter your delegations, you have the option to enter the categories that your various delegations are sorted under. For example, delegations may be categorised as relating to health or planning etc. These headings will be used to compile the various delegations in category order when the delegations register is printed.
3. To enter categories, select the *Delegations Categories* icon, and then *Add New Category*.
4. Enter the category name and then select *Save*.
5. You can view a list of the categories entered under the *Categories* tab.
6. We also recommend entering the *Heads of Power* and *Delegation Types* before beginning entering the delegations themselves.
7. Select the *Heads of Power* icon
  - a. Delegation heads of power represent the legislation or authorisation of delegations of authority. Adding a head of power to a delegation is not mandatory, but it is recommended and can be useful for categorising the delegations as they appear in the register.
8. Select *Add new Head of Power*, enter a title and a description (optional) and select *Save*. We would recommend including a numerical reference with each Head of Power to assist with ordering the delegations in the register. Eg, '01 *Local Government Act 1995*, 02 *Building Act 2011*.
9. Next select the *Delegations Types* icon
  - a. A delegation type is an optional feature for grouping delegations for reports as well as how delegations will appear in the register. A type can be defined as anything that assists in classifying or grouping delegations. For example, you may wish to group delegations by legislation or by 'Council to CEO', 'CEO to Employees', etc

10. Enter *Delegation Types* by repeating the same steps you followed when entering categories.

## 1.1 Entering Delegation details

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1. To begin entering delegations, select the *Manage Delegations* icon and select the *Create new Delegation* tab.
  - a. Be sure to monitor the *Help sections* on each page as you fill out the detail of the delegation. These sections provide further information and guidance on what to include in each section.
2. Enter a *Reference* for the delegation.
  - a. The value you enter in the *Reference* field will be used to uniquely identify and sort each delegation in ascending order in the printed Delegations Register. You can use letters and numbers in this field but be aware of how this will affect sorting.
3. Next enter the subject of the delegation (for example, *Recovery of Costs Bush Fires Act*). Select *Next*.
4. Optional: Next select *the Head of Power, Category and Delegation Type*.
5. Next, select the *Delegator*
  - a. This is the position or administrative body with the original power and authority to delegate the exercise of its powers or the discharge of its duties, e.g. Council.
6. Now enter the *Express Power to Delegate*
  - a. The express power to delegate describes the authority or legislation allowing for the delegation of the exercise of the entity's powers or the discharge of its duties.
7. Now you need to enter the *Express Power or Duty Delegated*
  - a. The express power or duty delegated lists the legislation and relevant sections describing the power or duty that is being delegated.
  - b. Next enter a full description of the function of the power or duty that is being delegated.
8. Add the delegates by selecting *Add*, then tick the boxes next to the positions from the list that apply
  - a. Select the positions or administrative bodies to whom the power or duty has been delegated to. If a mistake is made, you can easily remove and add the correct delegate.
9. Next, add any conditions that may apply
  - a. Add any conditions that might affect the usage of the power or duty. If there are no conditions, leave this section blank.

10. If relevant, enter the *Express Power to Subdelegate*
  - a. The express power to subdelegate describes the authority or legislation allowing for the subdelegation of the exercise of its powers or the discharge of its duties. If the power or duty is not being subdelegated, leave this section blank.
11. If relevant, you will now add any subdelegates.
  - a. Select the positions or administrative bodies to whom the power or duty has been subdelegated to. If there are no subdelegates, ignore this section. If a mistake is made, you can easily remove and add the correct subdelegate.
12. Fill in any subdelegate conditions that apply
  - a. Add any conditions that might imposed by the delegate in respect of the usage of the power or duty. If there are no subdelegate conditions, leave this section blank.
13. If relevant, enter the statutory framework that underlines the function and the delegation of the power or duty. This can include relevant legislation that indirectly supports the function and the delegation of the power or duty. If no statutory framework exists, leave this section blank.
14. Enter any policies that might relate to the function and the delegation of the power or duty. If there are no policies, leave this section blank.
15. Enter any record keeping references that might relate to the function and the delegation of the power or duty. If there are no record keeping references, leave this section blank.
16. Now enter any amendments to this delegated power or duty. View the onscreen *Help* for more information regarding amendments
  - a. Enter the *Adoption Date*, followed by the Type of amendment that can be selected from the drop-down menu. See the onscreen *Help* for descriptions of the types of amendments.
  - b. Next enter an *Amendment Description*
  - c. Finally, enter any relevant *References* (optional) and *Save*.
17. This will bring you to the final *Preview* page before publishing. If the delegation is correct, select *Prepare for Publishing*.
  - a. Once the draft delegation meets the minimum requirements in terms of the completion of all the required sections the *Prepare for Publishing* button will be available.
  - b. Alternatively, you can leave the new delegation unpublished (will only appear in the Draft Register) until you return to it later by selecting *Save and Exit*.
  - c. Note: You can use this feature to create a draft *Delegation Register* which you can check for errors or to confirm details prior to finalising by publishing the Register.

18. Once you select *Prepare for Publishing* you are taken to a page that allows you to print the *Delegation*, *Edit the Draft*, *Discard the Draft*, *Review* and *modify review dates*, *view the versions and history*, *view which users have the delegated authority*, and finally, *publish to the register*.
19. Once you select *Publish to the register*, you have the option to update the *Adoption Date* and *References* and add an *Amendment*. You also have the option to send an email notification of this delegation to all delegates and subdelegates. This is particularly useful if there has been a change made to the delegation in order to make them aware.
20. Once you're satisfied select *Publish to the Register* to finalise.

## 1.2 Removing a delegation from the Register

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1. From the Home Screen, select the *Delegations* Icon
2. Next select *Manage Delegations*.
3. From the list of delegations, select the delegation(s) you wish to remove from the register
4. Removing a repealed delegation from the register is a two-step process that requires you to first mark the delegation for removal when you are aware it will be removed, and then confirm removal after the appropriate approvals have been obtained.
5. To do this first select *Mark for Removal*, then, confirm your decision by selecting *Mark for Removal* again at the top of the page.
  - a. This simply tags the delegation and highlights it as *MARKED FOR REMOVAL* in the draft version of the register
  - b. If you have marked a delegation for removal by mistake, this can easily be reversed by unmarking it for removal.
6. Once approval is granted to remove the repealed delegation from the register, you can select *Remove from the register* and if necessary, add an amendment to record details of the change to the register.
7. Finally, to finalise the changes, select *Remove from the Register*. This is the final step to ensure all changes are reflected on the register itself.
8. You can restore the delegation to the register at any time simply by searching for the delegation under *Manage Delegation*, selecting it, and then choosing *Restore to the Register*, then *Publish to the Register*.

## 1.3 Editing a delegation or adding an amendment

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1. From Home, select *Delegations*.
2. Select the *Manage Delegations* Module
3. Select the delegation you wish to *Edit* or add an *Amendment* to.
4. Select *Create New Draft* on the right-hand side of the screen

5. If you wish to *Edit* the delegation, keep selecting *Next* until you get to the section you wish to edit.
6. Alternatively, if you wish to record an amendment, keep selecting *Next* until you get to the amendments section.
7. Select *Add* to add the new amendment. Enter the required information, followed by *Add*.
8. Continue through the delegation until you get to the *Preview Screen*.
9. Select *Prepare for Publishing*
10. Check the details are correct and select *Publish to the Register*.
11. If necessary, enter the date the delegation was adopted, etc and press *Publish to the Register*.
12. This will replace the previous version of the delegation. You can view all versions at any time under the tab *Versions*.

#### 1.4 Sending Advice Notifications

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You have the option to send out a group email notification for each delegation at any time.

1. Select the relevant delegation
2. Select the tab *Assignments and advice notifications*
3. Here you can view who has the delegation
4. Now select the tab *Send a Group Notification*
5. Select *Create Group Notification Email*
6. Scroll down and select any and all delegates/subdelegates that you wish to send an email notification to.
7. Select *Send*
8. You can view a comprehensive history of all notifications sent by selecting the *Notification History* tab.

#### 1.5 Setting Up/Editing Your Delegations Register

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Attain will allow you to easily generate your Delegations Register at any time ready for printing. If you use the export feature, you can convert the Attain generated report into an PDF file ready for uploading to your website or export to Microsoft Word, ready for any design features you may wish to add.

You should have a saved Delegations Register already.

1. From the Home Page, select the *Delegation* icon.
2. Select Register of Delegated Authority
3. This will bring you to a list of all your Saved Registers. Here you can customise and organise your register by selecting various filters to suit the needs of your organisation.
  - a. The two basic types of Registers you would have would be a Draft Register and a Published Register.

4. To create a new Register from scratch, select the tab *Create a New Register*.
5. Give the Register a Title and hit Save.
6. Now you will need to customise the register to suit your Needs. First select the *Cover Page* tab, select *Edit* and ensure the *Show Cover Page Logo* box is ticked. Then enter the desired Register Title of your document – eg '*Register of Delegations 2025*'.
7. Now go to the *Introduction* tab. Either copy and paste your existing Introduction or click the button to Add our standard Introduction. This will appear at the beginning of the document.
8. *Amendments Period* tab. At the end of the Register there will be a table that lists all Amendments to all delegations. This tab allows you to filter that table to restrict it to Amendments of a certain time period. If you wish all Amendments to be included, leave this tab blank.
9. *Document Review* tab. This table allows you to enter details of all previous reviews of your Delegations Register. It will appear at the front of the document. Select Add New Review to add details of a review.
10. *Document Properties*. This is an optional tab that allows you to add customised Headers and Footers to the Register.
11. *Filter By* tab. Use this tab if you wish to generate a register filtered by certain criteria – such as a document that only displays Delegations from Council to CEO (not CEO to Employees). You can also Filter by certain Delegates, Subdelegates, Types and Heads of Power. If you have made a selection here, ensure you hit the Save button.
12. *Group By* tab. This allows you to sort the Register by certain criteria. In most cases you would order it by Head of Power, then either Type or Category.
13. *Structure* tab. This allows you to leave certain sections **out of the register**. For example, if you don't wish the Introduction to appear in the register, you would untick the box. As always, if you make a customisation here, ensure you press Save.
14. *Options* tab. Under options, it is possible to switch on the following settings:
  - Subdelegations - This switch will hide all details of subdelegations from appearing in the register so that only the delegations and all other details will appear. This is a good option when presenting the register to the delegator (i.e. the Council) to keep the focus on the delegations only.
  - Amendments - This switch will hide the amendments from appearing at the end of each individual delegation. The idea here is to reduce the overall length of the register and display all amendments for all delegations at the end of the register as a separate section.
  - Draft markings - Switch this on to hide all draft markings and delegations marked for removal. This is a good option for printing a copy of how the draft register will look after it has been published.
15. If you wish to create another Saved Register with similar settings (eg if you have just created a Draft Register and now wish to create a Published version), we recommend simply changing the 'Register Version' to Published (under the Version and Format tab) and the selecting *Save Register As*. You will then be able to save a new Version of the Register that has the same settings. However, ensure you select the Cover Page tab to give it a title.

## 1.6 Printing the Delegations Register

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Select the saved register that you wish to generate from the list. If this is a Draft register, you may wish to tick the box to show Tracked Changes in the document. This will have any new additions to your delegations in green, and anything that has been deleted in red with a line crossed through it.

Select the format you wish to generate the register in (such as Microsoft Word) and hit the button *Generate Printable Register*.

Note – if you need to create a new register, we suggest selecting one of the registers you have already saved, make any adjustments, then hit Save As to save a new version. This saves you having to start a register from scratch and configure the settings.

## 1.7 Adding review dates

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It is possible to add review dates for your delegations register that will apply to all delegations. Once entered, these review dates will automatically flow through to all delegations making it easy to manage the review dates. However, it is possible to override these dates for a specific delegation by setting the review dates within the delegation itself.

To set the review dates for all delegations

1. From Home, select *Delegations*
2. Now select *Review Dates*
3. Select *Edit* and enter the *Last Reviewed Date (optional)* followed by the *Next Reviewed Date*. Once the next review date has been set, Attain will use this date to remind you when the next review is due.
4. Select *Save*.

### Important tip

If you wish to override the general review date for a given delegation(s), go to Manage Delegations, select the delegation(s) in question, select the Review tab and select Modify. Here you can enter a customised review date that will only apply to the selected delegation. This will override the general review date entered for all other delegations. Again a reminder will prompt you when the review is due.



## Thank You

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