

# Records of exercise of delegated authority

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## 1. Managing records of exercise

In Attain, users with or without delegated powers or duties have the option to manage all records that relate to the exercise of any delegation that is assigned to them for action. Users will see a table showing all *Active* and *Submitted* records that relate to themselves. That is, they will only see those records that they created or submitted. In this way a user, without delegated authority, can monitor records they have submitted to the user with delegated authority for checking, and see those that have been returned for further attention.

Administrators will have the added feature to see and print all submitted records from any user.

1. From the Home Page, Select the *Delegations* icon
2. Then Select *Manage Records of Exercise*.
3. This will take you to a table that will show you all *Active records* (those awaiting submission), and those that have been *Submitted*.
4. Under the *Active records* tab, you can select a record from the list. This will take you to a screen with a summary of the record of exercise. From here you can *Delete* the record or *Send a Reminder for Review and Submission*. You can also view a full history of the record and see the user that the record is currently with.
5. Under the *Submitted* records tab you can select a record from the list and you will be taken to a screen with the option to select a summary of the record or *Delete* the record, or *Download a Printable Record*.

### **Printable register**

6. By selecting the Printable register tab:
  - a. You can create a summarised printable register of all submitted records of exercise of delegated powers or duties.
  - b. You can fully customise this report by selecting parameters such as *date of decision* or *date submitted*, or a specific date range, or sort by *category of delegation*, and a number of other filters.
7. After selecting your preference, you can customise the printable report to suit your requirements after viewing *Preview results*.
8. This will show you all the records that will appear on your report before you generate it. You can change the parameters by selecting *Go Back* or *Register configuration*.
9. Once you are happy with it, select *Generate printable register* and a report will be generated.

## 2. Submit a record of 'Exercise of Delegated Authority' in Attain

Attain provides the ability to record the use of a delegation. This is useful to keep track of the times a delegation is exercised on behalf of the officer with the delegate authority. In other words, when the 'acting through' principle is being used. Attain employs a workflow process to ensure the record being created records the delegation being used and can only be submitted for approval to the officer assigned the authority to exercise this delegation.

Officers with delegated powers or duties have the option to manage all records that relate to the exercise of any delegation that is assigned to them. These Users will see a table showing all *Active* and *Submitted* records that relate to themselves. That is, they can see those records that they have created or submitted. In this way a User, can monitor records they have submitted for approval, and see those that have been returned for further attention.

To enter a record of the use of a delegation follow these steps:

1. Log into Attain (not Attain Administration) - <https://app.attain.au/>
2. From the Home Screen, select *Submit a New Record of Exercise*
3. You will be presented with a list of delegations applicable to your organisation. From the list, choose the relevant delegation you are exercising. You may use the search function to assist in locating the relevant delegation.
4. Next select the officer or committee (the entity) that has been delegated the authority to exercise the delegated powers or duties.

**IMPORTANT:** If you (or the position you occupy) has been delegated the authority to exercise powers under this delegation, select your name from this list as the person exercising the delegated powers or duties. If your name does not appear and you have been formally delegated authority to exercise this delegation, contact your organisation's Administration Support Person to have the list amended. You can do this using the *Get Help* option located on the *Home* screen.

If you have not been delegated the authority to exercise this delegation (you are using the 'acting through principle'), you will need to select the name of the officer from this list, who will be receiving this form and formally exercising the authority under this delegation.

5. Next enter the details of the Record of Exercise, after which you will be brought to the *Review and Submit* page.
6. The record can now be sent to the intended recipient for their review and final submission as a record of the exercise of this delegation. Please ensure you have verified that the information is correct before sending the form.
7. You have the option here to *Add a Note* to the Record, and to send an email notification to the recipient before selecting *Send for Review and Submission*.



**IMPORTANT:** If you choose to tick the box to send a notification to the recipient, an email will be sent to the form recipient you have selected (the person that has the authority to exercise this delegation), alerting them that a new record has been submitted for their review and final submission.