

Frequently Asked Questions - Delegations

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What's the difference between Internal and Subscribed Instruments?

A Subscribed Instrument is one that is maintained by a law firm or organisation (eg: Maddocks in Victoria and LGASA in South Australia) and the Provisions can only be altered by RelianSys on the advice of whichever organisation is responsible for maintaining it. The only parts of Provisions in a Subscribed Instrument that can be changed at an organisational level are the delegates (who it is allocated to) and the Special Conditions and Limitations.

An Internal Instrument is one that is set up and maintained at the organisational level. The organisation can make any changes that they want to in one of these Instruments and it is solely for their use.

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How do I differentiate an Internal Instrument from a Subscribed Instrument in the Library?

In the Library section of Delegations, there are 3 possible views of this page. *Internal* displays only the Internal Instruments. *Subscribed* displays only the Subscribed Instruments. *Active* displays all the Instruments.

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How do I set up Titles?

Before you can delegate Provisions to people within your organisation you need to have Positions and Titles set up to delegate authority to.

- 1) Go into Delegations and select Settings. You will receive a screen with 2 options: Delegation Sources and Titles/Title Groups; select Titles/Title Groups.
- 2) In the resulting screen click on the +Add button to add new titles.
 - The *Position* field is the long form of the person's position within the organisation (eg: Chief Executive Officer).
 - The *Title* field is the acronym (eg: CEO). Both of these fields are required.
 - *Name of the Person* is optional and does not need to be entered if you do not wish to.
- 3) Click Save and the newly created Title will appear in your list.

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How do I set up Titles Groups?

You may wish to create a group of Titles and monitor your Delegations this way. This is often done when you have multiple individuals with the same role title.

- 1) From the **Titles** screen click on Title Groups. Click on the green +Add button.

- 2) Enter the name of the group (whatever you have decided to call it)
- 3) Enter the Title (whatever acronym you have decided to give it)
- 4) Add people to it by selecting the appropriate Titles from the Titles Available list and clicking on the > button to move them into the Titles box and add them into the group. You can also remove people from the group by selecting their Title and clicking on the < button to put them back into the Titles Available box.
- 5) Click Save.

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How do I look at the Provisions assigned to specific Title or Title Group within Delegations?

There will be times when it is easier to produce a report for a Position which details all of the Provisions specific to them, rather than producing an entire export of an Instrument and picking out the Provisions that apply to that one Position.

There are 2 areas within Delegations that can be used to produce such a report.

From Titles/Title Groups

- 1) Log into Delegations and select Settings
- 2) From the 2 options that appear select Titles/Title Groups
- 3) The default screen is the Titles screen, but if the Position you want to report on is part of a group you can click on the Title Groups option and be taken to that screen as well.
- 4) Locate the Position or Position Group you want to report on.
- 5) Click on the number under the Provisions column
- 6) Click on Complete Export, select a Template and click Export

You will get a Word document with the data contained in it that will only report on Provisions with that Position or Position Group as a delegate.

From Instruments

- 1) Once in Delegations select the Instruments screen
- 2) In the Instruments screen click on Provisions by Title, this will give you a list of all your Positions, complete with a number under the Provisions column that tells you how many Provisions have been assigned to that Position.
- 3) To produce the report, select the Position you want to report on by clicking in the checkbox next to it and then click on the Merge Export button.

- 4) Select a template and click on Export.

You will get a Word document with the data contained in it that will only report on Provisions with that Position or Position Group as a delegate.

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A new position has replaced an existing one. How do I remove the current one and assign all of its provisions to the new one?

This is a multi-step process.

Prior to deleting the old Position, it is recommended to first set up the new one\

- 1) Click on Settings and select the *Titles / Title Groups* option from the resulting screen.
- 2) You will get a view of all your existing Titles. This will show you the Position (the name of the position), the Title (the acronym that has been assigned to that position, ie: CEO = Chief Executive Officer), the Name (the name of the person occupying that position, if you have chosen to set it up this way (name is an optional field) and Provisions (how many Provisions that Position has been delegated to).
- 3) To set up a new Position, click on the green +Add button and fill in the new Position details in the resulting screen and then click Save.

You now need to **reassign all the provisions** that belonged to the old Position to the new one.

The best way to do this is:

- 1) Select the Library view screen
- 2) Locate the Instrument that you want to make the changes in and select it
- 3) You now need to find ALL the Provisions that the old Position has been delegated. The best way to do this is to **type the current Position into the Search box** and that will give you a list of ALL the Provisions with that Position as a Delegate.
- 4) Select ALL of the Provisions, tick the check box in the column header above the check boxes next to the Provision Status and ID. By default the screen is set to show 100 entries per screen. **If there are in excess of 100 entries** that you need to change, click on the dropdown arrow in the Show box and select All.
- 5) Click on the Bulk Edit button

- 6) You will get a screen showing all of the Selected Provisions and the Assigned Delegates.
Deselect the position you want to remove by clicking on the check box next to it in the Assigned Delegates area.
- 7) Select the Position that is replacing it.
- 8) Click on Send for Approval.

The Provisions will appear in the For Approval screen and you can follow the normal process to approve them and the Provisions will have been reassigned.

To remove the Position that is no longer required from the system so that it doesn't keep appearing in reports, etc. follow the process below:

- 1) Select Settings and Titles / Title Groups from the resulting screen.
- 2) Locate the Position that is to be removed, click on the check box next to it and then click on the red Delete button. You will receive a warning telling you that the Position has Provisions assigned to it and do you want to proceed? Answer yes and this will remove the Title from all the Provisions that it was assigned to.

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How do I assign or reassign multiple Provisions?

- 1) If you want to reassign or assign multiple Provisions either in an Internal or a Subscribed Instrument go to the Library view and locate the Instrument you want to work with.
- 2) Once in the Instrument use the Search function to locate all of the Provisions that you want to work with and click on the check box in the column header next to the Provision Status and Id. This will select everything on the screen. Note: the screen default view is 100, so if the amount of Provisions you want to change is more than 100 then it is a good idea to select the All option from the Show box.
- 3) Click on the green Bulk Edit box.
- 4) Select the Position you want to add or remove from the Assigned Delegates box in the resulting screen and click Send for Approval, then follow your usual approval process to complete the action.

You can also alter the Special Conditions & Limitations text box in this screen.

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How do I assign Provisions that do not have a delegate connected to them?

The situation may arise that there will be Provisions that don't have a delegate connected to a Provision and you still need a way to send these for Approval.

The best way to get around this is as follows:

- 1) Log into Delegations
- 2) Select Settings and Titles/Title Groups
- 3) Click on +Add
- 4) Set up a Position and Title of 'Not Delegated'
- 5) Go into Library, locate the Instrument/s with the undelegated Provisions and assign them to the newly created Not Delegated Position.

This will allow you to send the Provisions for Approval.

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How do I delete Provisions?

Customers cannot delete Subscribed Instruments. This can only be done by RelianSys and under instructions from the legal organisation that is responsible for updating the legislation)

Customers can delete their own Internal Instruments.

- 1) Go to the Library view screen in Delegations and select Internal, this will bring up a list of only Internal Instruments.
- 2) Locate the Instrument you want to delete Provisions from and click on it.
- 3) Select however many Provisions you want to delete and then click on the red Delete button. This will remove the Provision from the Instrument.

Note: the deleted Provision/s will not be reported on, but they can still be seen by going into the Instrument and selecting the Deleted button.

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Why are Deleted Provisions still appearing in my exports?

When you receive a notification that changes have been made to Delegations, these changes will appear in the Updates tab for processing.

The Updates screen also has a *New & Changed* column which will display any new Provisions that have been added to an Instrument and the amount of Provisions that were changed.

The *Deleted* column displays whether or not an Instrument has deleted Provisions in it. To check, click on the Instrument and it will display all the changed Provisions.

Changed Provisions are denoted by the letter C next to the ID number.

New Provisions are denoted by the letter N next to the ID number.

Deleted Provisions are denoted by the letter D next to the ID number.

If there are recently deleted Provisions, a red *Clear* button will appear above the list. If you are satisfied that these Provisions can be removed from your export, you can select the checkbox and then click *Clear*. They will no longer appear in your export. You can select multiple provisions at once. To Select All, select the check box at the top of the list of Provisions before hitting Clear.

Note: 100 entries are shown per screen. Other options that can be selected from the dropdown are Show 200, or Show All. It is a good idea to select Show All before doing a bulk Clear, so you don't have to repeat this action for several pages.

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