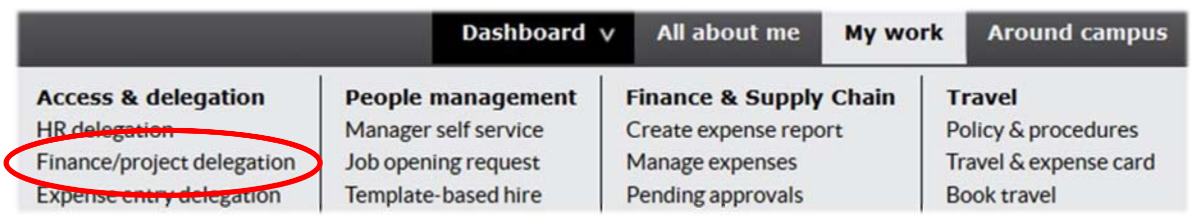
Create New Project Delegation

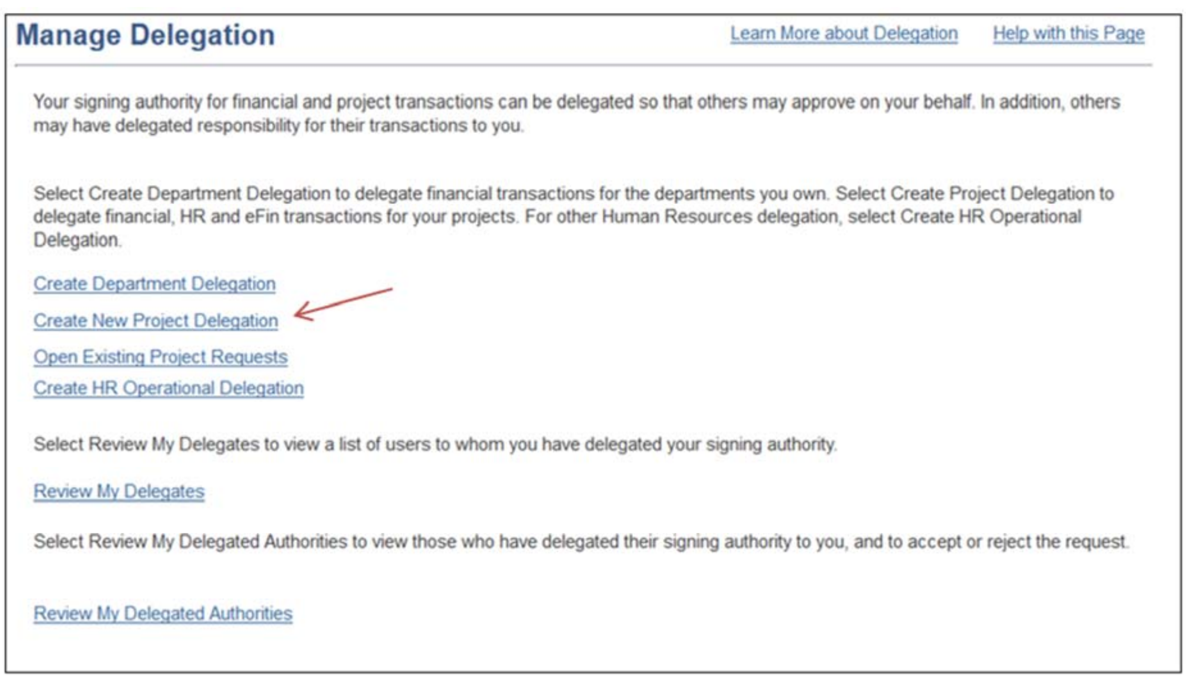
As a Project Budget Owner you have the ability to delegate your approval authority for your projects online. The Manage Delegation page will allow you to assign and manage delegations for Finance, eFIN, and Human Resources transactions from the same page in the portal.

This guide shows you how to enter Project Delegation.

1. Navigate to My work > Finance/project delegation



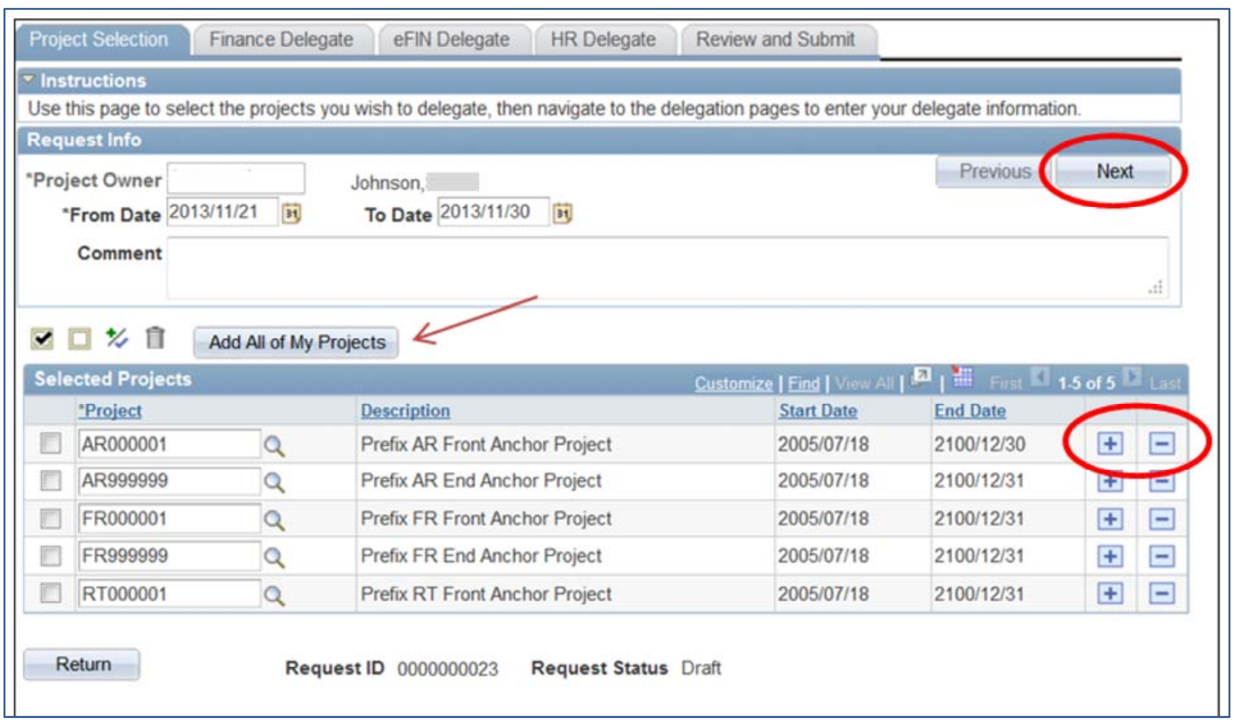
2. Choose the Create New Project Delegation link



3. Project Selection tab

This tab is used to identify the projects you wish to delegate and/or provide eFIN access. The From Date is defaulted to today's date and can be changed to a future date. If the delegation is on-going, you can leave the To Date field blank and it will auto-populate with the date "2100-12-31" once it has been submitted. To Dates can be entered for short-term access (e.g. vacation).

a) Select the **From Date** and a **To Date** that will initially define the delegation time span. Dates can be edited in each delegate tab.
b) Add comments if desired. Comments are for your own information only.
c) Click [Add All of My Projects] to auto fill the projects fields, or enter a specific project number in the Project field. You can also add or delete projects by using the plus and minus icons to the right.
   NOTE: Delegates selected on all subsequent pages (Finance, eFIN and HR) will be given corresponding access to each of the projects selected.
d) Click on the box beside the Project ID to select a project for delegation.



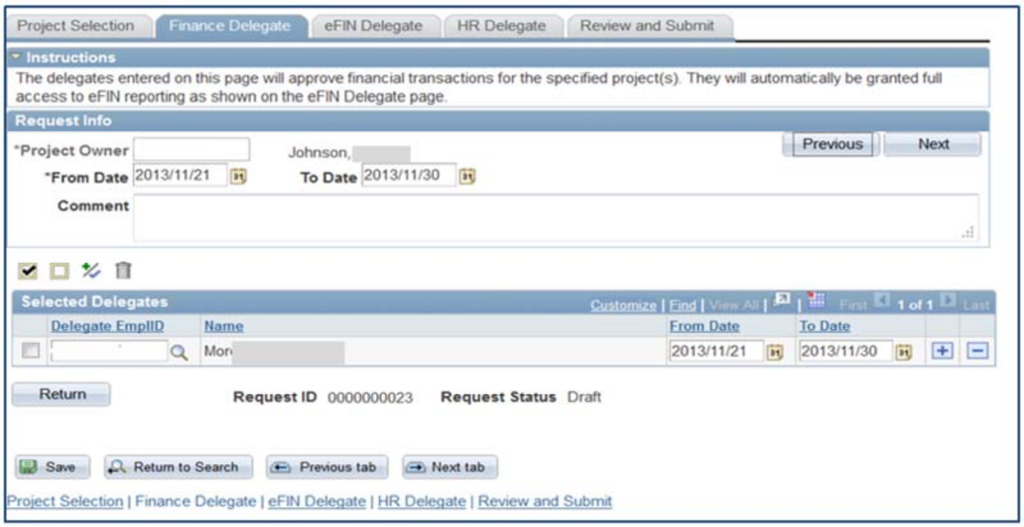
e) Click [Next] to continue on to the Finance Delegate page.

4. Finance Delegate tab

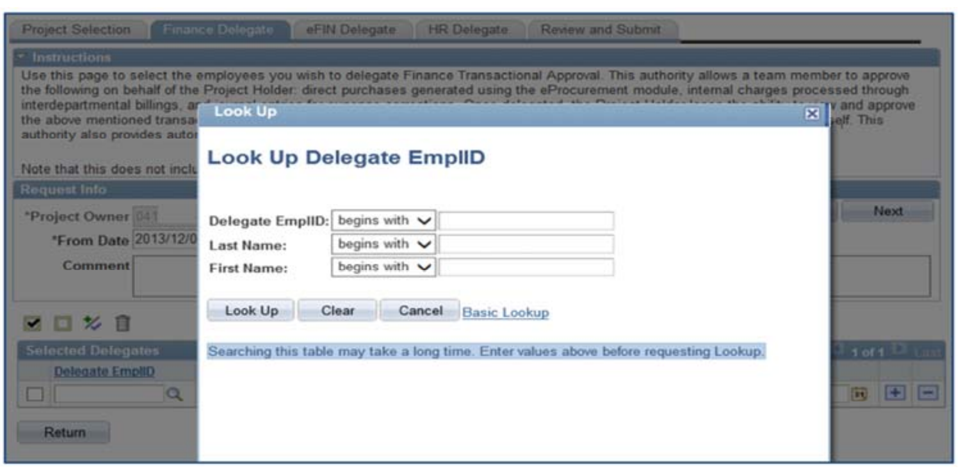
This tab is used to select the employee you wish to delegate Finance Transaction Approval.

The From and To Dates will pre-populate based on the information entered on the Project Selection page. These dates can be edited if different dates are desired. If the delegation is on-going, you can leave the To Date field blank and once submitted it will auto-populate with the date “2100-12-31”.

a. Edit the **From Date** and a **To Date** if necessary.



b. Enter the Employees ID for your delegate or click on the Look Up tool
NOTE: Only U of C employees can be named as Finance delegates.



NOTE: Once delegated, the Project Holder loses the ability to view and approve Finance Transactions. To retain these functions, please add a row using the ‘plus’ icon to enter your own Employee ID.

c. Click Next to proceed to the eFIN Delegate page.

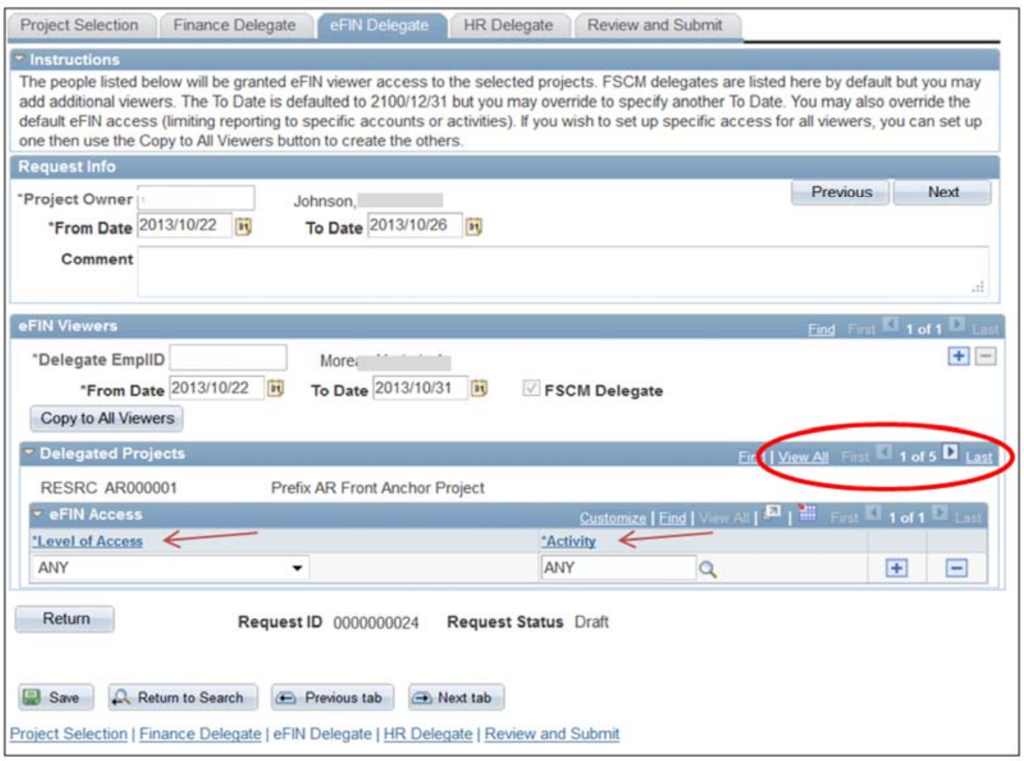
5. eFIN Delegate

Content on this tab will pre-populate based on all delegates you have selected as Finance delegates for each project. These delegates will automatically be created as eFIN delegates and will be granted full access which allows your delegate to view all account transactions including salary and benefits.

The eFIN view access can be edited to restrict access if required. You can override the eFIN view authority by adjusting either or both the Level of Access or Activity ID.

a. Choose the eFIN **Level of Access** from the drop down list:
   - ANY – allows eFIN view access to *all* account transactions for a given project
   - NON SALARY – allows eFIN view access to all account transactions <u>*except*</u> Salary and Benefit transactions for a given project
   - SALARY AND BENFITS – allows eFIN view access to all Salary and Benefit account transactions *only* for a given project

b. The **Activity** ID defaults to ANY but can be restricted by selecting from a lookup.



c. Click <u>View All</u> to see all projects if you selected more than one on the project selection tab.
   NOTE: eFIN delegates do not have to be U of C employees, as long as they have an employee ID.

d. Click Next to proceed to the HR Delegate page. If you are only delegating your approval authority for financial transactions then the delegation process is now COMPLETE and you can click on the Review and Submit tab and go to step 7.

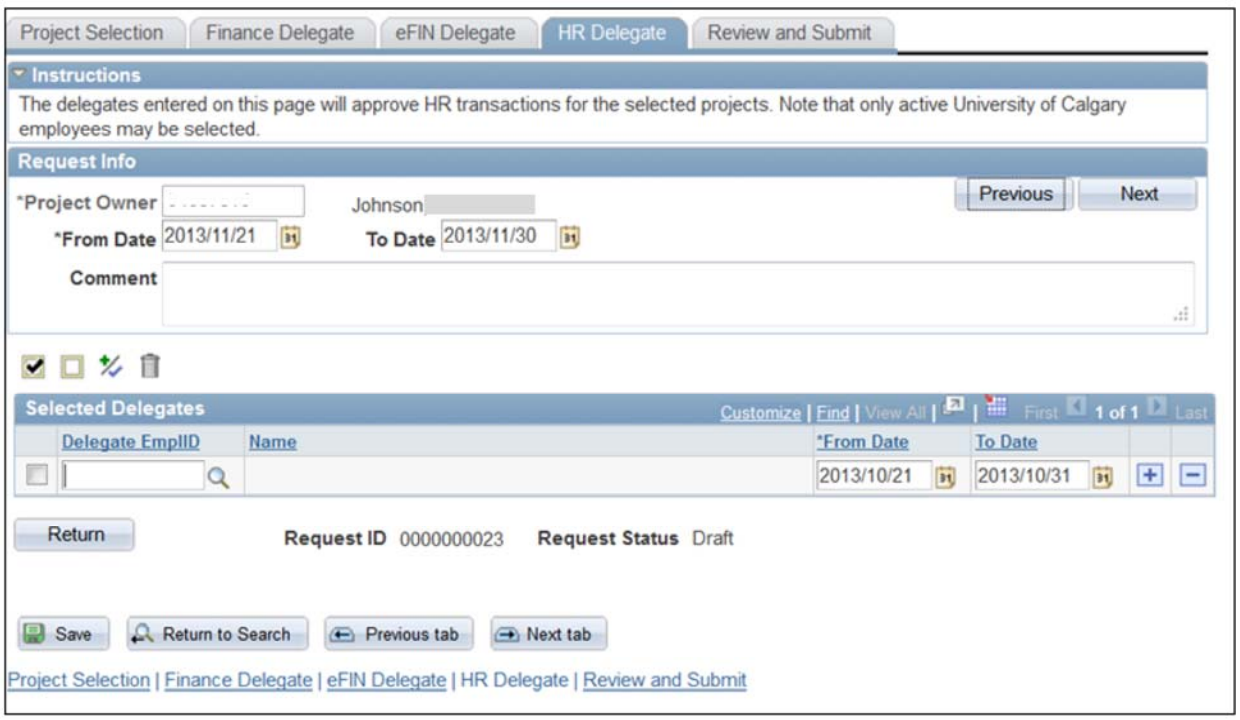
6. HR Delegate

The From and To Dates will pre-populate based on the information entered on the Project Selection page. These dates can be edited if different dates are desired. If the delegation is on-going, you can leave the To Date field blank and once submitted it will auto-populate with the date “2100-12-31”.

The delegate entered on this page will approve all HR transactions for the selected projects. Only active University of Calgary employees may be selected and the Project Holder still has the ability to approve any or all of the transactions.

a. Enter the Employees ID for your delegate or use the Look Up tool.

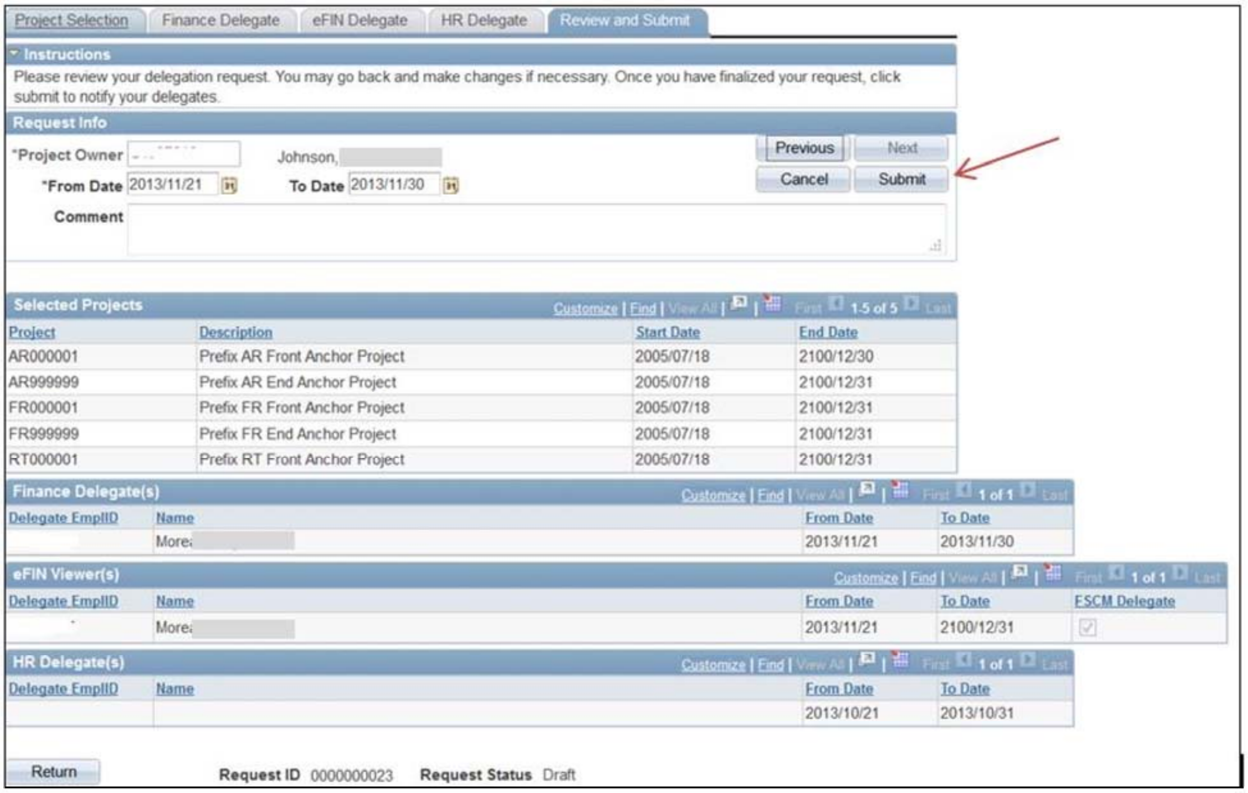
NOTE: Once delegated, the Project Holder DOES NOT lose the ability to view and approve HR Transactions. You are not required to enter your own Employee ID on this tab.



b. Click Next to proceed to the Review and Submit page.

7. Review and Submit

This page will provide a summary of all the delegations that you will be requesting. You can review the delegations and go back and make changes if necessary.



Once you have finalized the request, click Submit. The delegate will then receive a notification to accept the delegation request.

Still have questions? Contact Us!

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