

# 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

Dashboard ▾		All about me	My work	Around campus
<b>Access &amp; delegation</b>	<b>People management</b>	<b>Finance &amp; Supply Chain</b>	<b>Travel</b>	
HR delegation	Manager self service	Create expense report	Policy & procedures	
<b>Finance/project delegation</b>	Job opening request	Manage expenses	Travel & expense card	
Expense entry delegation	Template-based hire	Pending approvals	Book travel	

## 2. Choose the Create New Project Delegation link

**Manage Delegation** [Learn More about Delegation](#) [Help with this Page](#)

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Your signing authority for financial and project transactions can be delegated so that others may approve on your behalf. In addition, others may have delegated responsibility for their transactions to you.

Select Create Department Delegation to delegate financial transactions for the departments you own. Select Create Project Delegation to delegate financial, HR and eFin transactions for your projects. For other Human Resources delegation, select Create HR Operational Delegation.

[Create Department Delegation](#)  
[Create New Project Delegation](#) ←  
[Open Existing Project Requests](#)  
[Create HR Operational Delegation](#)

Select Review My Delegates to view a list of users to whom you have delegated your signing authority.

[Review My Delegates](#)

Select Review My Delegated Authorities to view those who have delegated their signing authority to you, and to accept or reject the request.

[Review My Delegated Authorities](#)

### 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  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.

Project Selection | Finance Delegate | eFIN Delegate | HR Delegate | Review and Submit

**Instructions**  
Use this page to select the projects you wish to delegate, then navigate to the delegation pages to enter your delegate information.

**Request Info**

\*Project Owner

\*From Date   To Date

Comment

**Selected Projects**  |  |  |  |  |

Project	Description	Start Date	End Date		
<input type="checkbox"/> AR000001	Prefix AR Front Anchor Project	2005/07/18	2100/12/30	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="checkbox"/> AR999999	Prefix AR End Anchor Project	2005/07/18	2100/12/31	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="checkbox"/> FR000001	Prefix FR Front Anchor Project	2005/07/18	2100/12/31	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="checkbox"/> FR999999	Prefix FR End Anchor Project	2005/07/18	2100/12/31	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="checkbox"/> RT000001	Prefix RT Front Anchor Project	2005/07/18	2100/12/31	<input type="button" value="+"/>	<input type="button" value="-"/>

Request ID 0000000023 Request Status Draft

- e) Click  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.

Delegate EmplID	Name	From Date	To Date
	Mon	2013/11/21	2013/11/30

- 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.

Look Up Delegate EmplID

Delegate EmplID: begins with

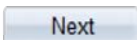
Last Name: begins with

First Name: begins with

Look Up Clear Cancel Basic Lookup

Searching this table may take a long time. Enter values above before requesting Lookup.

**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  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 except Salary and Benefit transactions for a given project
  - SALARY AND BENEFITS – 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.


The screenshot displays the 'eFIN Delegate' configuration interface. It features a navigation bar with tabs: 'Project Selection', 'Finance Delegate', 'eFIN Delegate' (active), 'HR Delegate', and 'Review and Submit'. The main content area includes an 'Instructions' section, a 'Request Info' section with fields for 'Project Owner' (Johnson), 'From Date' (2013/10/22), and 'To Date' (2013/10/26), and a 'Comment' field. Below this is the 'eFIN Viewers' section with fields for 'Delegate EmplID', 'From Date' (2013/10/22), 'To Date' (2013/10/31), and a checked 'FSCM Delegate' checkbox. The 'Delegated Projects' section shows a table with one project: 'RESRC AR000001' with the name 'Prefix AR Front Anchor Project'. A red circle highlights the 'View All' link in the project list. Below the table, the 'eFIN Access' section has dropdown menus for 'Level of Access' (set to 'ANY') and 'Activity' (set to 'ANY'). At the bottom, there are buttons for 'Return', 'Save', 'Return to Search', 'Previous tab', and 'Next tab'. The 'Request ID' is 000000024 and the 'Request Status' is Draft.

- c. Click View All 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.

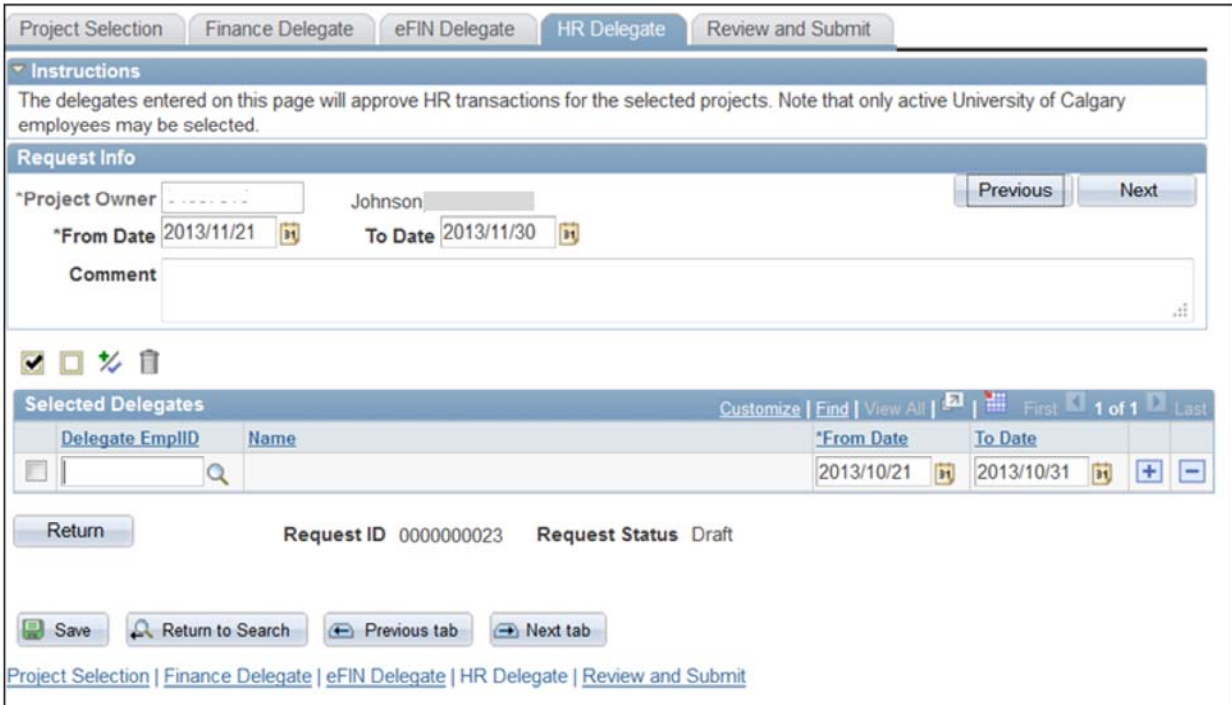
## 6. HR Delegate

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.



Project Selection | Finance Delegate | eFIN Delegate | **HR Delegate** | Review and Submit

**Instructions**  
The delegates entered on this page will approve HR transactions for the selected projects. Note that only active University of Calgary employees may be selected.

**Request Info**

\*Project Owner: [.....] Johnson [.....] Previous Next

\*From Date: 2013/11/21 [..] To Date: 2013/11/30 [..]

Comment: [.....]

**Selected Delegates** Customize | Find | View All | First | 1 of 1 | Last

Delegate EmplID	Name	From Date	To Date		
[.....]	[.....]	2013/10/21 [..]	2013/10/31 [..]	[+]	[-]

Return Request ID 000000023 Request Status Draft

Save Return to Search Previous tab Next tab

[Project Selection](#) | [Finance Delegate](#) | [eFIN Delegate](#) | [HR Delegate](#) | [Review and Submit](#)

- 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.

The screenshot displays the 'Review and Submit' interface. At the top, there are navigation tabs: 'Project Selection', 'Finance Delegate', 'eFIN Delegate', 'HR Delegate', and 'Review and Submit'. Below the tabs is an 'Instructions' section with the text: 'Please review your delegation request. You may go back and make changes if necessary. Once you have finalized your request, click submit to notify your delegates.'

The 'Request Info' section contains the following fields and buttons:

- 'Project Owner' dropdown menu showing 'Johnson,'
- 'From Date' field: 2013/11/21
- 'To Date' field: 2013/11/30
- 'Comment' text area
- Buttons: 'Previous', 'Next', 'Cancel', and 'Submit' (highlighted with a red arrow)

The 'Selected Projects' table lists the following data:

Project	Description	Start Date	End Date
AR000001	Prefix AR Front Anchor Project	2005/07/18	2100/12/30
AR999999	Prefix AR End Anchor Project	2005/07/18	2100/12/31
FR000001	Prefix FR Front Anchor Project	2005/07/18	2100/12/31
FR999999	Prefix FR End Anchor Project	2005/07/18	2100/12/31
RT000001	Prefix RT Front Anchor Project	2005/07/18	2100/12/31

The 'Finance Delegate(s)' table shows:

Delegate EmplID	Name	From Date	To Date
	More: [redacted]	2013/11/21	2013/11/30

The 'eFIN Viewer(s)' table shows:

Delegate EmplID	Name	From Date	To Date	ESCM Delegate
	More: [redacted]	2013/11/21	2100/12/31	<input checked="" type="checkbox"/>

The 'HR Delegate(s)' table shows:

Delegate EmplID	Name	From Date	To Date
		2013/10/21	2013/10/31

At the bottom of the page, there is a 'Return' button and the text: 'Request ID 000000023 Request Status Draft'.

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

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Still have questions? Contact Us!

Integrated Service Centre

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