Delegation of Authority (DA)

Questions to Answer (before starting a request)

1. Who is the appropriate employee to grant access to the organizations and transaction types that I need? This person will be selected on the Delegation of Authority request as the **delegator** to approve signature authority.

2. Has my delegator been granted signature authority to the organization and transaction types that I need within the Delegation of Authority system?

   a. Follow the delegation of authority instructions to begin a request to the intended delegator. Clicking on the Green and White button in the organization section displays the default organizations available for selection by this delegator. The delegator must have completed this process prior to a delegate submitting a request.

   b. Transaction types are grayed out and not selectable if the delegator does not have open authority for a specific transaction type.

3. Is there one person that can grant me access to what I need for signature authority?

   a. If there is one person that can give me authority to all the organizations and transaction types across multiple divisions, then one request may be submitted.

   b. **If I need to select multiple organizations on a single request, I do this by holding down the Control key while selecting multiple organizations.**

   c. If I need access to organizations in more than one division and there is not one delegator with the same access that I need, a separate request must be submitted for signature authority from the appropriate delegator in **each** division.

4. Which organizations do I need signature authority for these transaction types?

   a. Rollup organizations are available for selection. This is the preferred choice when appropriate. However, a rollup Organization can only be selected when there are no exceptions. If there is one Organization this person should not have authority for then the next level down in the Organization Hierarchy must be selected.

   b. If rollup organizations are selected and new organizations are created in the future, the user with rollup organization authority will have authority for the new organization.

   c. If lower level organizations are individually selected and new organizations are added, the user will not have authority for the new organizations. A new request would be required.

   d. Questions or problems with the Organization Hierarchy can be directed to the University Budget Office at 737-1445.

5. From the list below, identify which document types I need to select on my request form?

a. Budget Form   c. Position Change Form

b. Direct Payment Form   d. Pre-Travel Form

c. Journal Entry Form   e. Post-Travel Form

6. Should I be the Primary Approver? Yes or No Radio button. If a button is not selected, this will default to No. Future plans are to use the primary data field to programmatically identify who to route an electronic form to for approval.

7. [Delegator Question Only] Does the delegate need open or restricted signature authority (authority scope)?

   a. The application defaults access to restricted authority. This means a user has signature authority but is not authorized to grant signature authority to other users.

   b. To obtain open authority, the **delegator** must change the default before approving the request.

   c. The entire request is either all open or all restricted. If a user needs both types of authority for different types or different Organizations then separate requests must be submitted.

Summary for Delegate: _____

1. **Delegator's Name:** _____B-ID:_____
   - o Delegator must have authority to pass a request along. Options are not available for selection if delegator does not have authority.
   - o It is possible that a delegate will have to complete two summaries if more than one delegator or request needs to be completed.

2. **Organizations and effective dates:**

   _____

   _____

   _____

3. **Types to Select:**   **Primary: Yes or No**

   ____   Direct Payment   ___Yes ___No

   ____   Budget Form   ___Yes ___No

   ____   Journal Entry   ___Yes ___No

   ____   Position Change Form   ___Yes ___No

   ____   Pre-Travel Form   ___Yes ___No

   ____   Post-Travel Forms   ___Yes ___No

4. **Authority Scope:**   Remind Delegator to toggle to Yes when needed.

   ___No (Restricted) I don't need to give authority to other staff.

   ___Yes (Open) I need to give authority to other staff.

5. **Check the "I certify" box.**