

Delegation of Authority (DA)

Delegator Approval Instructions

1. After the delegate submits a request, it is ready for approval by the delegator.
 - a. An automatic email notification is sent to the selected delegator to let them know when a request is waiting for their approval.
 - b. Instructions to the delegator are included in the automatic email notice.
2. Go to <https://pirateport.ecu.edu/portal/>. Log in using your pirateid and password.
3. Under the Employee Menu, click "**Delegation of Authority**".
4. The section at the top of the **Delegation of Authority** menu allows the delegator to filter the requests displayed. In the first image below the Status filter is set to "SUBMITTED". This limits the displayed requests to the actions the delegator needs to approve. This option may save time.

Delegation of Authority

To filter the request results, enter field values or select a value in the fields below and exit the fields. The filtered results will display below.

Request ID:	<input type="text"/>	Status:	<input type="text" value="SUBMITTED"/>	<input type="checkbox"/> Requests Awaiting My Approval
Delegate:	<input type="text"/>	Delegator:	<input type="text"/>	
Effective From:	<input type="text"/>	Effective To:	<input type="text"/>	<input type="button" value="Clear filters"/>

[+ Create NEW Request](#)

[👤 Approver Maintenance](#)

[📄 Create VC Request](#)

To create a new Delegation of Authority request, click the 'Create NEW Request' button. Click on any column header to sort the request listing based on the column values. For a quick view of the authority items and orgs delegated by a request, click the image in the details column. To view/process a request, click the request ID link.

request ID	delegator	delegate	status	effective start	effective end	scope	once active	details
158	Angela Wilson	Angela Wilson	SUBMITTED	11/29/11		RESTRICTED	N	
160	Angela Wilson	Angela Wilson	SUBMITTED	01/11/12		RESTRICTED	N	

- If the Status filter is set to ANY, then all requests where this person was the delegate or delegator including active, terminated, pending, signed, or submitted requests are displayed.

Delegation of Authority



To filter the request results, enter field values or select a value in the fields below and exit the fields. The filtered results will display below.

Request ID: Status: Requests Awaiting My Approval

Delegate: Delegator:

Effective From: Effective To:

[Create NEW Request](#)

[Approver Maintenance](#)

[Create VC Request](#)

To create a new Delegation of Authority request, click the 'Create NEW Request' button. Click on any column header to sort the request listing based on the column values. For a quick view of the authority items and orgs delegated by a request, click the image in the details column. To view/process a request, click the request ID link.

request ID	delegator	delegate	status	effective start	effective end	scope	once active	details
122	Nancy Phelps	Amanda Pantelidis	TERMINATED	10/11/11	11/09/11	RESTRICTED	N	
126	Nancy Phelps	Timothy Morris	TERMINATED	11/08/11	11/09/11	RESTRICTED	Y	
328	Nancy Phelps	Timothy Morris	ACTIVE	04/23/13		RESTRICTED	Y	

- Authority Scope – *****VERY IMPORTANT***** If the person receiving authority on this request needs to further delegate signature authority within the organizational structure, then the delegator must change this selection from “No (RESTRICTED)” to “Yes (OPEN)”. If nothing is changed the delegate on this request is allowed to approve transactions but not give others authority to sign. The default is NO (RESTRICTED). Only the Delegator (approver) can make this selection change. Located at the bottom of the request.

Authority Scope: I certify my approval for this delegate to further authorize signature authority to other employees. Yes(OPEN) No(RESTRICTED)

Click the 'Cancel' button to return to the request listing. To approve the request, make any desired changes to the modifiable fields and click the 'Approve' button. To deny the request, click the 'Terminate' button.

I certify that I have read and agree to follow the [Guidelines for the Delegation of Authority Form](#).

- Review organizations requested to determine if appropriate for delegate.

Financial Services Delegation Of Authority Request

Request ID: 574 Effective Dates: 06/08/17 - Request Date: 06/08/17 Status: SUBMITTED

Delegator: Angela Wilson, Dir of Systems Coordination Delegator's Home Org: 240901 - AFH Systems Coordination

Delegate: Stephanie Stroud, 12249 Tech Support Analyst Delegate's Home Org: 240901 - AFH Systems Coordination

Comments: Delegated Orgs
502:AA Graduate School (ROLLUP)

- Review transaction type(s) requested to determine if appropriate for delegate. Yes should be selected for the primary approver. Future electronic forms or processes will use the primary field to determine the person to route to for approval.

Selected Authority Item(s):

Direct Payment Forms

Designate delegate as the primary authority for this item: YES NO

Existing Delegations:

Request ID	Current Status	Effective Dates	Delegate	Home Org	Primary?
98	ACTIVE	10/04/11 -	Anne Jenkins	240101:AFH Financial Services Admin Other	Y <input checked="" type="checkbox"/>
155	ACTIVE	11/18/11 -	Stephanie Coleman	240101:AFH Financial Services Admin Other	N <input checked="" type="checkbox"/>
152	ACTIVE	11/18/11 -	Stephanie Coleman	240101:AFH Financial Services Admin Other	N <input checked="" type="checkbox"/>
154	ACTIVE	11/18/11 -	Stephanie Coleman	240101:AFH Financial Services Admin Other	N <input checked="" type="checkbox"/>
378	ACTIVE	12/13/12 -	Petula Rose	240901:AFH Systems Coordination	N <input checked="" type="checkbox"/>
143	PENDING	01/01/12 - 06-30-12	Petula Rose	240901:AFH Systems Coordination	N <input checked="" type="checkbox"/>

Budget Forms

Designate delegate as the primary authority for this item: YES NO

Existing Delegations:

Request ID	Current Status	Effective Dates	Delegate	Home Org	Primary?
98	ACTIVE	10/04/11 -	Anne Jenkins	240101:AFH Financial Services Admin Other	Y <input checked="" type="checkbox"/>
155	ACTIVE	11/18/11 -	Stephanie Coleman	240101:AFH Financial Services Admin Other	Y <input checked="" type="checkbox"/>
152	ACTIVE	11/18/11 -	Stephanie Coleman	240101:AFH Financial Services Admin Other	Y <input checked="" type="checkbox"/>
154	ACTIVE	11/18/11 -	Stephanie Coleman	240101:AFH Financial Services Admin Other	N <input checked="" type="checkbox"/>
378	ACTIVE	12/13/12 -	Petula Rose	240901:AFH Systems Coordination	N <input checked="" type="checkbox"/>
143	PENDING	01/01/12 - 06-30-12	Petula Rose	240901:AFH Systems Coordination	N <input checked="" type="checkbox"/>

Journal Entry Forms

Designate delegate as the primary authority for this item: YES NO

Existing Delegations:

Request ID	Current Status	Effective Dates	Delegate	Home Org	Primary?
98	ACTIVE	10/04/11 -	Anne Jenkins	240101:AFH Financial Services Admin Other	Y <input checked="" type="checkbox"/>
155	ACTIVE	11/18/11 -	Stephanie Coleman	240101:AFH Financial Services Admin Other	Y <input checked="" type="checkbox"/>
152	ACTIVE	11/18/11 -	Stephanie Coleman	240101:AFH Financial Services Admin Other	Y <input checked="" type="checkbox"/>
154	ACTIVE	11/18/11 -	Stephanie Coleman	240101:AFH Financial Services Admin Other	N <input checked="" type="checkbox"/>
378	ACTIVE	12/13/12 -	Petula Rose	240901:AFH Systems Coordination	N <input checked="" type="checkbox"/>
143	PENDING	01/01/12 - 06-30-12	Petula Rose	240901:AFH Systems Coordination	N <input checked="" type="checkbox"/>

- Review the link to the Guidelines for the Delegation of Authority Form and click the **"I certify button"**. Please note the approval of a delegate does not relieve the disbursing authority of the ultimate fiscal responsibility and accountability of funds under his or her control. By appointing others to sign on his or her behalf, the disbursing authority is not delegating responsibility but merely providing the authorization to approve transactions.

9. Selecting the **“Approve Delegation”** button is the last step for the delegator.

Authority Scope: I certify my approval for this delegate to further authorize signature authority to other employees. Yes(OPEN) No(RESTRICTED)

Click the 'Cancel' button to return to the request listing. To approve the request, make any desired changes to the modifiable fields and click the 'Approve' button. To deny the request, click the 'Terminate' button.

I certify that I have read and agree to follow the [Guidelines for the Delegation of Authority Form](#).

Unless there is a problem, the delegator should select Approve Delegation. All the options that can be selected are listed below.

- a. Cancel – To get out of the request and do nothing.
- b. Update – Changes to the request will be saved.
- c. Approve Delegation – Request is complete and automatically forwarded to Division approver.
- d. Terminate Request – approval is not appropriate.

Helpful Tips

Adding a new Vice Chancellor record to the System

When turnover occurs at the Vice Chancellor level, only the System Administrator may add the VC authority. The Division should notify the System Administrator when this is needed. As of November 2022 the administrator can be contacted at syscoord@ecu.edu or 328-2475.