



Delegating Approval Authority

This process guide describes how approvers can delegate their approval authority to another user. A delegation of approval authority is a temporary change, typically set up to handle approvals/denials when the original approver is out of the office (e.g., vacation). The delegation of approval authority can be set at any time from any computer with Internet access.

1. From the NC E-Procurement Dashboard, click **'Preferences'** on the blue Menu Bar.

The screenshot shows the NCE-Procurement dashboard. The top navigation bar includes 'Home', 'Saved Searches', and 'Preferences' (highlighted with a dashed circle). The dashboard contains several widgets: 'Common Actions' (Create, Manage), 'Recently Viewed' (list of requisitions), 'Purchasing Links', 'E-Procurement Resources', 'To Do' (table of pending actions), 'Search' (catalog search), 'News' (welcome message), and 'My Documents' (table of documents).

ID	Date ↓	From	Status	Title	Required Action
RQ20001086	4/2/2012	NCAS Requester	Submitted	Test eRequisition to Edit	Approve
RQ20000642	3/8/2012	NCAS Requestor	Submitted	Approving a Requisition	Approve
RQ20000639	3/8/2012	NCAS Requestor	Submitted	Denying a Requisition	Approve
RQ20000322	2/25/2012	NCAS Requestor	Submitted	Denying a Requisition	Approve
RQ20000192	2/21/2012	NCAS Requestor	Submitted	Test Buying Entity	Approve

ID	Title	Date ↓	Status
RQ20000704	Untitled Requisition	3/13/2012	Composing

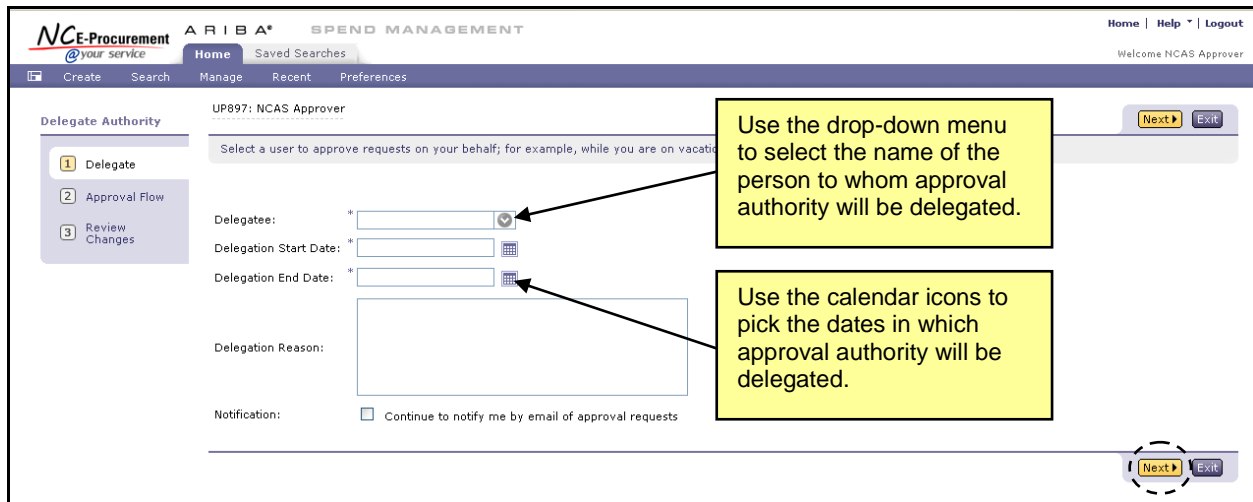
2. Select **'Delegate authority'** from the **'Preferences'** drop-down menu.

The screenshot shows the NCE-Procurement dashboard with the 'Preferences' menu open. The 'Delegate authority' option is highlighted with a dashed circle. The rest of the dashboard content is identical to the previous screenshot.

3. **Delegatee** – Select the user’s name from the drop-down menu that will be responsible for approving the eRequisitions while the normal approver is out of the office. If the user’s name is not in the drop-down menu, select ‘**Search for more...**’ to search for the user.
4. **Delegation Start Date** – Use the calendar icon to enter the date in which the delegation should begin.
5. **Delegation End Date** – Use the calendar icon to enter the date in which the delegation should end.

Note: When delegating approval authority, the delegation end date should be the day the user plans to return to the office. The automated process to end delegations occurs daily after midnight. For example, if an approver is going to be out of the office from January 1st to January 4th, returning to the office on January 5th, the delegation dates should be entered as January 1st to January 4th. The delegate will stop receiving eRequisitions to approve beginning at 12:00am on January 5th; however, the original approver continues to receive the approval requests even during the delegation period.

6. **Delegation Reason** – Enter comments as to why this delegation request is being entered.
7. **Notification** – Users have the option to continue to be notified of approval requests throughout the delegation period. To do so, check the box next to ‘**Continue to notify me by email of approval requests.**’
8. Click ‘**Next**’ to continue.





9. The user to whom approval authority is being delegated must approve all delegation requests. In some cases, the user's supervisor must approve the request as well.

10. Click 'Next' to continue.

11. Review changes and click 'Submit.'

Note: If the original approver logs into the NC E-Procurement Service during the period in which they have set a delegation of approval authority, an Active Delegation of Authority page displays. This page reminds the approver of the individual's name who is now designated to approve his/her work and the timeframe for the delegation of authority. It also gives the approver the option to continue or stop using the delegation. In either case, the approver has the ability to approve/deny eRequisitions. When the approver selects to stop the delegation of approval, the delegated approval authority is deactivated.