Delegate Approval Authority

This document covers 3 items regarding delegating your approval authority:

1. Delegating your approval authority page 1
2. Delegatee functionality page 4
3. Delegator functionality page 6

Delegating your Approval Authority

You are able to delegate your approval authority to another employee to facilitate the approval process, for example, you’re going on vacation for two weeks. In order to set up the delegation, you must complete the following steps before the vacation, travel, leave of absence, etc.

*Note:* Any Approval Authority Delegation will affect the approval for all UMeNET documents including eBERFs, Purchase Requisitions, HR Requests, and eChecks.

1. Open the UMeNET login page by visiting: [http://enet.miami.edu/Buyer/Main](http://enet.miami.edu/Buyer/Main). Enter your CaneID and myUM password, then click Login. All full-time University employees already have access to UMeNET.

2. Select Preferences from the Actions Toolbar. Then select Delegate Approval Authority.
3. Click the dropdown arrow for Delegatee and select **Search for more...**.

![Dropdown screenshot]

4. Search for the Delegatee by entering their name into the open field, then select **Search**. Click the **Select** button located to the right of the correct name.

![Selecting Delegatee screenshot]

5. Enter the **Delegation Start Date** and **Delegation End Date** by either selecting them from the calendar icon or manually entering them (MM/DD/YYYY) in the date field.

*Note: Dates must be in the future.*

![Calendar and date entry screenshot]
6. A Delegation Reason is not required but can be entered. If you would like to continue receiving emails to notify when your approval is needed, select the Notification box.

7. Select Next.

8. Select Next again.

9. Select Submit.
Delegatee Functionality

When the Delegatee, in this case Elsa Liauwapau, logs into UMENET, they will be asked who they would like to log in as. Two or more options may exist depending on how many people have delegated their authority to that user:

- **Act as User**
  
  You have the permission to act as the users listed below. You can log in as yourself or as the other user.

  **Log in as:**
  - Elsa Liauwapau - 1290 requests require action
  - Allison Gilbert - 1123 requests require action

Logging in as the Delegator

If the Delegatee selects another person’s name, like Allison Gilbert, the name in the top right corner will change.

The Delegatee will have the ability to (1) Approve and (2) Create documents on behalf of the Delegator.

Approve

If a Delegatee approves a document on your behalf, the following will appear in the approval flow:
Submit

If a Delegatee submits a document on your behalf, the following will appear in the History:

<table>
<thead>
<tr>
<th>Date</th>
<th>User</th>
<th>Real User</th>
<th>Action</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mon, 2 Apr, 2012</td>
<td>Allison Gilbert</td>
<td>Eliza Liuwapaue</td>
<td>Submitted</td>
<td>B182868 submitted for approval.</td>
</tr>
</tbody>
</table>

Switching between users

In order for the Delegatee to switch between users, they need to:

1. Click the Logout button in the top right corner.
2. Log back into UMeNET using your caneID and password.
3. Select the other UMeNET user from your list.

If the Delegatee selects their name, the screen will show their name in the upper left corner and they will have access to create, edit, and delete UMeNET documents under their name.
Delegator functionality

The following message will appear if the Delegator, in this case Allison Gilbert, signs in to UMeNET while their approval authority is delegated to another UMeNET user:

![Active Delegation of Authority]

- Continue using the delegation of authority
- Stop using the delegation of authority