

# HOW TO Delegate Approvals of Purchase Requisitions, Change Orders and Pcard Transactions

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## How to Delegate Approvals

1. Log in to [Minerva](#).
2. Go to the **Finance (Fund) Administration** Menu
3. Select the **Procurement Administration** menu option
4. Click on the **Delegate Approvals of Purchase Requisitions, Change Orders and PCard Transactions** menu option
5. If you are the Fund Financial Manager (FFM) or Principal Investigator (PI), go to step 7. In the **FFM ID** field, enter the McGill ID of the Fund Financial Manager / Principal Investigator. Click on Search if the ID is not known.
6. Hit the **TAB** key to validate the ID. The FFM's name will appear next to the field.

**Note:** In the bottom half of the page, a listing of all Funds and approval delegates associated to each fund or those "Awaiting Confirmation" will appear.

**Hover over the McGill ID** of the delegate to view who requested the approval delegation record. An info box will be displayed - "Requested by: First name Last name".

7. In the **ID of Approval Delegate** field, enter the McGill ID of the individual who will be approving transactions, on behalf of the FFM. Click on Search if the ID is not known.
8. Hit the **TAB** key to validate the ID. The individual's name will appear next to the field.

*If the following message appears you will not be able to complete the delegation record today.*

### Manage Approval Delegates

You may create approval delegation records on behalf of an FFM. Enter the McGill ID of the Fund Financial Manager for whom you are preparing delegation records. Enter the McGill ID of the new person to whom you wish to delegate approval responsibility, along with an expiration date if required. Existing delegates or those awaiting confirmation by the FFM will be shown below. Only entries confirmed by the FFM are active.

FFM ID	<input type="text"/>	<a href="#">Search</a>
ID of Approval Delegate	<input type="text"/>	<a href="#">Search</a> <small>Person/Program is not a FIS user</small>
Expiry (DD-MON-YYYY)	<input type="text"/>	

(for funds selected below)

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This individual needs a Finance profile to be created before they may be named as an approval delegate. In order to create a Finance profile, they must be sponsored.

In the **Expiry Date** field, enter a termination date (if applicable).

**Note:** The format of the date should be 01-MAR-2018 for a date of March 01, 2018.

Delegations with termination dates will terminate at the expiry date. As a result, the entire record will be revoked automatically.

9. From the **list of funds**, associated with the FFM / PI, select the funds to be assigned to the Delegate by:
  - o Checking the **Select All box**,



The screenshot shows a table with three columns: 'Fund', 'Subsequent Approval Required Over', and 'Delegation Threshold\*'. The first row has a 'Select All' checkbox checked and a red arrow pointing to it. The fund name is '123456 Financial Services', the approval amount is '\$1,000', and the threshold is '\$10,000'.

Select All	Fund	Subsequent Approval Required Over	Delegation Threshold*
<input checked="" type="checkbox"/>	123456 Financial Services	\$1,000	\$10,000

OR

- o Checking the **box next to the individual fund(s)**.



The screenshot shows a table with three columns: 'Fund', 'Subsequent Approval Required Over', and 'Delegation Threshold\*'. The first row has a 'Select All' checkbox unchecked and a red arrow pointing to the checkbox next to the fund name. The fund name is '123456 Financial Services', the approval amount is '\$1,000', and the threshold is '\$10,000'.

Select All	Fund	Subsequent Approval Required Over	Delegation Threshold*
<input type="checkbox"/>	123456 Financial Services	\$1,000	\$10,000

10. Scroll back to the **Manage Approval Delegates** box near the top of the screen.
11. Click **Apply**.

Once the record is created, the Name and McGill ID of the Approval Delegate will appear under the selected fund(s).

For all delegate records created on behalf of a FFM / PI, there will be a message "Awaiting Confirmation" displayed next to the name and McGill ID of the intended delegate. These records must be confirmed by the FFM /PI.

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## How to Confirm or Revoke Approval Delegate Records

Fund Financial Managers (FFM) or Principal Investigators (PI) may confirm or revoke records. If you prepared a record **on behalf of an FFM/PI**, you may revoke delegation records you created prior to the record being confirmed.

1. If you are the Fund Financial Manager (FFM) or Principal Investigator (PI), click on the link in the email you received (log in is required). This will bring you to the Procurement Administration menu in Minerva. Otherwise,
  - o Log in to [Minerva](#)
  - o Go to the **Finance (Fund) Administration** Menu
  - o Select the **Procurement Administration** menu option
  - o Click on the **Delegate Approvals of Purchase Requisitions, Change Orders and PCard Transactions** menu option
  - o In the **FFM ID** field, enter the McGill ID of the Fund Financial Manager / Principal Investigator on behalf of whom you created delegation records
  - o Hit the **TAB** key to validate the ID.
2. A **list of approval delegates associated to each fund**, or those *"Awaiting Confirmation"* will be displayed.
3. Click on the **McGill ID button**, next to the name of the delegate awaiting confirmation. Their ID and name will appear in the **ID of Approval Delegate** field.
4. Select the fund for which that delegate has a record "Awaiting Confirmation" by clicking on the **check box** next to the fund.  
*Note:* If the individual has multiple delegate records awaiting confirmation, you may select multiple funds.
5. Click on the **Confirm** button to confirm the selected record(s) which are "Awaiting Confirmation".  
OR  
Click on the **Revoke** button to cancel/remove the selected record(s).

*Note:* Once a delegation record is "confirmed", only the FFM/PI may revoke the record.

*Note:* It is important for the FFM / PI to check the figure that appears for each fund in the **"Subsequent Approval Required Over"** field.

- This is the maximum amount delegates may approve without the FFM's subsequent approval.
- If this limit has never been changed then it will default in as \$10,000 or the amount entered in the Delegation Threshold field in FZMFUND.

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This limit may only be changed by the FFM. Follow the steps below, if you wish to change the limit of the "Subsequent Approval Required Over" amount.

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## How to Change the Amount for the "Subsequent Approval Required Over" field (Manage Limits)

Only Fund Financial Managers (FFM) or Principal Investigators (PI) may perform this function.

1. Log in to [Minerva](#).
2. Go to the **Finance (Fund) Administration** Menu
3. Select the **Procurement Administration** menu option
4. Click on the **Delegate Approvals of Purchase Requisitions, Change Orders and PCard Transactions** menu option
5. In the **Manage Limits** box, enter the amount for **Subsequent approval required over**. This is the maximum amount delegates may approve without the FFM's subsequent approval. If this limit has never been changed, then it will default in as \$10, 000.
6. DO NOT click on the Apply button just yet.
7. **Select the fund**, which should have the entered limit, by clicking on the check box next to the fund.
8. Click **Apply** in the Manage Limits box. You will see the limit has been changed.

*Note:* The "Subsequent Approval Required Over" amount applies to all delegates assigned to a fund.