

HOW TO Delegate Temporary Signing Authority for travel advances, expense reports, and payment requests

A Fund Financial Manager (FFM) or Principal Investigator (PI) may delegate signing authority for travel advances, expense reports, and payment requests during temporary absences.

The delegate must be an academic staff or administrative and support staff member possessing the necessary skills and knowledge for the effective exercise of signing authority.

In the case where the claimant on an expense report or travel advance is the Fund Financial Manager or Principal Investigator, their direct superior must approve the request.

Signing a document signifies that the Approver (FFM/PI or their delegate) has assessed whether it:

- Meets the objectives of the fund(s) charged.
- Is legitimate, reasonable and an appropriate use of funds.
- Adheres to policies and guidelines.
- Complies with any restrictions imposed by external funding sources.

For Tri-Agency grants (NSERC, CIHR, SSHRC, CRC), please note the following:

- Delegates may not be implemented for “administrative convenience”.
- Delegates must not be administrative staff.
 - PIs may delegate signing authority on expenses when necessary to a co-investigator or a member of their research staff, such as a lab manager or research associate.
 - Administrative staff should not be designated as signing delegates, as they are not sufficiently familiar and/or involved in the research to authorize expenses on the grant holder’s behalf.
- The signing of Expense Reports payable to **visiting researchers** may not be delegated and must be countersigned by the Dean or Chair.

To become a temporary delegate, a temporary delegation record must be created and a Fund Financial Manager must confirm the record.

Records are created and queried in **Minerva > Finance (Fund) Administration > Delegate Temporary Signing Authority** menu option.

HOW TO Delegate Temporary Signing Authority for travel advances, expense reports, and payment requests

When creating records, there are two options to choose from:

- Add to One Fund – create a single temporary delegation record for one individual and one document type added to one fund
- Add to Multiple Funds – create multiple temporary delegation records for one individual, for one or more document types, added to one or more funds

When temporary delegation records are created on behalf of a Fund Financial Manager or Principal Investigator, **email alerts** are sent out to the FFM or PI twice daily at 10am and 2pm. Clicking on the link in the email will bring them to the Delegate Temporary Signing Authority menu option in Minerva (sign-in is required).

To view a listing of temporary delegation records (List function), a combination of three search parameters must be selected. Depending upon an individual's role, the listed records may then be copied, edited, confirmed or revoked.

Step-by-Step Instructions

To access any of the functions below:

- Log in to [Minerva](#).
- Go to either the **Finance (Fund) Administration Menu**.
- Click on the **Delegate Temporary Signing Authority** menu option

Creating Temporary Delegation Records:

- Add to One Fund

Add to One Fund: Create a single temporary delegation record for one individual and one document type added to one fund

Filter By

Fund Code	<input type="text"/>	🔍
Fund Financial Manager ID	123456789	🔍
Delegate ID	<input type="text"/>	🔍
Prepared by ID	<input type="text"/>	🔍

Document Type

<input checked="" type="checkbox"/> Expense Report	Mode
<input checked="" type="checkbox"/> Travel Advance	
<input checked="" type="checkbox"/> Payment Request	

Show Active Delegates as of Date (DD-MON-YYYY): 05-AUG-2020 🗓️

<input type="radio"/> Show Terminated only
<input type="radio"/> Show Pending Confirmations only
<input type="radio"/> Show Funds with no Delegates

List **Add to One Fund** Add to Multiple Funds Reset

HOW TO Delegate Temporary Signing Authority for travel advances, expense reports, and payment requests

1. In the **Fund Financial Manager ID** field, enter the McGill ID of the Fund Financial Manager (FFM) or Principal Investigator (PI). Click on the magnifying glass icon if the ID is not known.
 2. Click on the **Add to One Fund** button.
 3. The **Add a Temporary Delegation Record** page is displayed.
 4. In the **Delegate ID** field, enter the McGill ID of the individual who will be a temporary delegate. Click on the magnifying glass icon if the ID is not known.
 5. Tab to the next field to validate the ID (e.g. display the associated name).
 6. In the **Fund Code** field, enter a 6 digit fund code associated with the Fund Financial Manager listed on the page. Click on the magnifying glass icon if the fund code is not known.
 7. Tab to the next field to validate the fund code (e.g. display the associated title).
 8. Select a **Document Type** from the pull-down menu.
 9. In the **Effective Date** field, enter the starting date of the temporary delegation record in the format DD-MON-YYYY or click on the calendar icon to select a date.
Note: The effective date must not be prior to today's date.
 10. In the **Termination Date** field, enter the end date of the temporary delegation record in the format DD-MON-YYYY or click on the calendar icon to select a date.
Note: The termination date must not be greater than 365 days from the effective date. For example: If the Effective Date is 25-MAR-2013, the Termination Date must be prior to, or no later than 24-MAR-2014.
 11. Click on the **Submit** button to create the temporary delegation record, or, click on the **Back** button to return to the main menu page.
- [Add to Multiple Funds](#)

Add to Multiple Funds – Create multiple temporary delegation records for one individual, for one or more document types, added to one or more funds

Filter By

Fund Code

Fund Financial Manager ID

Delegate ID

Prepared by ID

Document Type

- Expense Report
- Travel Advance
- Payment Request

Mode

- Show Active Delegates as of Date (DD-MON-YYYY):
- Show Terminated only
- Show Pending Confirmations only
- Show Funds with no Delegates

List Add to One Fund **Add to Multiple Funds** Reset

1. In the **Fund Financial Manager ID** field, enter the McGill ID of the Fund Financial Manager (FFM) or Principal Investigator (PI). Click on the magnifying glass icon if the ID is not known.
2. Click on the **Add to Multiple Funds** button.

HOW TO Delegate Temporary Signing Authority for travel advances, expense reports, and payment requests

3. The **Add Multiple Delegation Records** page is displayed.
4. In the **Delegate ID** field, enter the McGill ID of the individual who will be a temporary delegate. Click on the magnifying glass icon if the ID is not known.
5. Tab to the next field to validate the ID (e.g. display the associated name).
6. By default all **Document Types** are selected. De-select any document types which do not apply.
7. In the **Effective Date** field, enter the starting date of the temporary delegation records in the format DD-MON-YYYY or click on the calendar icon to select a date.
Note: The effective date must not be prior to today's date.
8. In the **Termination Date** field, enter the end date of the temporary delegation records in the format DD-MON-YYYY or click on the calendar icon to select a date.
Note: The termination date must not be greater than 365 days from the effective date. For example: If the Effective Date is 25-MAR-2013, the Termination Date must be prior to, or no later than 24-MAR-2014.
9. All **funds** associated with the displayed Fund Financial Manager are listed in a table. Select one or more funds for which temporary delegation records will be created.
OR
Click on the **Select ALL** box to create temporary delegation records for all funds listed in the table. Clicking the Select ALL box again will de-select all funds.
10. Click on the **Continue** button to review the temporary delegation records, or, click on the **Back** button to return to the main menu page.
11. The **Review and Submit Multiple Delegation Records** page is displayed.
 - This page lists all temporary delegation records generated from the data provided on the previous page (*Add Multiple Delegation Records*).
 - The number of new records to be created and rejected is displayed.
 - The system verifies all temporary delegation records to ensure that no overlap records will be created. An overlap record is a record which references all or part of a time period for which a previous record has already been created. These overlap records are identified with icons. Refer to the legend at the top of the screen for further information.
12. Click on the **Submit** button to create the new temporary delegation records, or, click on the **Back** button to return to the previous page to make changes to the temporary delegation records.






Listing (Querying) Temporary Delegation Records & Related Functions

- [List](#)
- [Copy](#)
- [Edit](#)
- [Confirm](#)
- [Revoke](#)

HOW TO Delegate Temporary Signing Authority for travel advances, expense reports, and payment requests

List - View a listing of temporary delegation records

For this function, a combination of three search parameters must be selected.

Filter By Fund Code <input type="text"/>  Fund Financial Manager ID <input type="text" value="123456789"/>  Delegate ID <input type="text"/>  Prepared by ID <input type="text"/> 	Document Type <input checked="" type="checkbox"/> Expense Report <input checked="" type="checkbox"/> Travel Advance <input checked="" type="checkbox"/> Payment Request	Mode Show Active Delegates as of Date (DD-MON-YYYY): <input type="text" value="05-AUG-2020"/>  <input type="radio"/> Show Terminated only <input type="radio"/> Show Pending Confirmations only <input type="radio"/> Show Funds with no Delegates
<input type="button" value="List"/> <input type="button" value="Add to One Fund"/> <input type="button" value="Add to Multiple Funds"/> <input type="button" value="Reset"/>		

1. Enter at least one search parameter in a **Filter By** field:
 - o Fund Code
 - o Fund Financial Manager ID (or Principal Investigator ID)
 - o Delegate ID
 - o Prepared by ID (McGill ID of an individual who has previously created temporary delegation records using this menu)

More than one field may be entered.

Click on the magnifying glass icon if the ID or fund code is not known.

Note: At least one filter by field must be entered.

2. By default all **Document Types** are selected. De-select any document types which do not apply to the search.
Note: At least one document type must be selected.
3. Select a **Mode**:
 - o Show Active Delegates as of Date: - Will display all confirmed temporary delegation records which are considered active as of the entered date, including records with a termination date equal to the entered date.
By default, the radio button for this mode is selected and today's date is auto-populated.
Enter the date in the format DD-MON-YYYY or click on the calendar icon to select a date.

Note: This mode may be chosen to list temporary delegation records which were active in the past or to list temporary delegation records which will be active in the future, depending upon the entered date.



HOW TO Delegate Temporary Signing Authority for travel advances, expense reports, and payment requests

- Show Terminated only - Will display all temporary delegation records with a termination date of today or earlier.
- Show Pending Confirmations only - Will display all unconfirmed temporary delegation records.
- Show Funds with no Delegates - Will display all funds for which there are no active temporary delegation records and no pending (unconfirmed) temporary delegation records.
Note: To use this mode, a Fund Financial Manager ID must be entered in the Filter By search parameter.

Note: One mode must be selected.

4. Click on the **List** button.
5. Temporary delegation records which match the entered search criteria will be displayed in a table. If no results appear, there may be no records matching the search criteria.

Depending upon an individual's role, the listed records may then be copied, edited, confirmed or revoked using the icons displayed under the Action column.

Use  to edit,  to copy,  to confirm (for FFMs only) and  to revoke.

FFM	Delegate	Prepared by	Fund	Document Type	Effective Date	Termination Date	Confirmation Date	Action
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Copy a temporary delegation record - Add a new temporary delegation record based on a previously created record

This feature is only available once the List function has been used to query temporary delegation records.

1. Find the record to copy in the table listing temporary delegation records.
2. Click on the Copy icon (displayed under the Action column).
3. Edit the displayed fields as needed.

Note:

- If changes are made to the **Fund Financial Manager ID, Delegate ID** or **Fund Code** fields, **Tab** to the next field to validate it (e.g. display the associated name or title).
- Click on the magnifying glass icon if the ID or fund code is not known.
- If changes are made to the **Effective Date** field, enter the date in the format DD-MON-YYYY or click on the calendar icon to select a date.
- The **Effective Date** must not be prior to today's date.

HOW TO Delegate Temporary Signing Authority for travel advances, expense reports, and payment requests

- If changes are made to the **Termination Date** field, enter the date in the format DD-MON-YYYY or click on the calendar icon to select a date.
 - The **Termination Date** must not be greater than 365 days from the effective date. For example: If the Effective Date is 25-MAR-2013, the Termination Date must be prior to, or no later than 24-MAR-2014.
4. Click on the **Submit** button to create the new temporary delegation record, or, click on the **Back** button to return to the main menu page.

Edit a temporary delegation record - Edit a previously created temporary delegation record

This feature is only available once the **List** function has been used to query temporary delegation records.

Fund Financial Managers (FFM) or Principal Investigators (PI) may edit confirmed or unconfirmed temporary delegation records at any time.

Unconfirmed temporary delegation records may also be edited by the individual who prepared the records (as displayed in the Prepared by column).

Edit an **unconfirmed** temporary delegation record

1. Find the record to edit in the table listing temporary delegation records.
2. Click on the **Edit** icon (displayed under the Action column).
3. Edit the displayed fields as needed.

Note:

- If changes are made to the **Fund Financial Manager ID, Delegate ID or Fund Code** fields, **Tab** to the next field to validate it (e.g. display the associated name or title).
- Click on the magnifying glass icon if the ID or fund code is not known.
- If changes are made to the **Effective Date** field, enter the date in the format DD-MON-YYYY or click on the calendar icon to select a date.
- The **Effective Date** must not be prior to today's date.
- If changes are made to the **Termination Date** field, enter the date in the format DD-MON-YYYY or click on the calendar icon to select a date.
- The **Termination Date** must not be greater than 365 days from the effective date. For example: If the Effective Date is 25-MAR-2013, the Termination Date must be prior to, or no later than 24-MAR-2014.

HOW TO Delegate Temporary Signing Authority for travel advances, expense reports, and payment requests

4. Click on the **Submit** button to save the changes made to the temporary delegation record, or, click on the **Back** button to return to the main menu page.

Edit a **confirmed** temporary delegation record (for FFMs or PIs only)

Only the **Termination Date** field may be edited.

1. Find the record to edit in the table listing temporary delegation records.
2. Click on the **Edit** icon (displayed under the Action column).
3. In the **Termination Date** field, enter the date in the format DD-MON-YYYY or click on the calendar icon to select a date.
Note: The termination date must not be greater than 365 days from the effective date. For example: If the Effective Date is 25-MAR-2013, the Termination Date must be prior to, or no later than 24-MAR-2014.
4. Click on the **Submit** button to save the changes made to the temporary delegation record, or, click on the **Back** button to return to the main menu page.

Confirm a temporary delegation record - Confirm a temporary delegation record prepared by someone else (for FFMs or PIs only)

This feature is only available once the **List** function has been used to query temporary delegation records. By default, **pending confirmations are always listed** when a Fund Financial Manager (FFM) or Principal Investigator (PI) accesses the Delegate Temporary Signing Authority page in Minerva.

1. Find the record to confirm in the table listing temporary delegation records.
2. Click on the **Confirm** icon (displayed under the Action column).

OR

1. Click on the **Confirm All** button to confirm all pending temporary delegation records listed in the table.

Revoke a temporary delegation record - Revoke a previously created temporary delegation record

This feature is only available once the **List** function has been used to query temporary delegation records.

Fund Financial Managers (FFM) or Principal Investigators (PI) may revoke confirmed or unconfirmed temporary delegation records at any time.

HOW TO Delegate Temporary Signing Authority for travel advances, expense reports, and payment requests

Unconfirmed temporary delegation records may also be revoked by the individual who prepared the records (displayed under the Prepared by column).

1. Find the record to revoke in the table listing temporary delegation records.
2. Click on the **Revoke** icon (displayed under the Action column).