Delegate Approval Responsibilities

An approver is an individual who reviews transactions, ensuring compliance with University policies and procedures. When an approver is temporarily unavailable, they must delegate approval authority to an authorized employee willing to act on their behalf. Authorized employees acting on behalf of the primary approver are called proxies. If the primary approver is a manager with direct reports, they can delegate approval via MyU or the Enterprise Financial System (EFS). If the approver is not a manager, they must delegate approval in EFS. Follow the instructions based on the approval role.

DELEGATE APPROVAL IN EFS FOR APPROVERS

Log in to MyU (myu.umn.edu). Navigate to: Key Links > PeopleSoft > EFS/Finance.

Navigate in EFS: NavBar > Navigator > EFS/Finance Menu > My System Profile.

On the General Profile Information page, the Alternate User section identifies the Internet ID of the employee who is authorized to receive and review EFS transactions. This employee has already been entered as an authorized alternate approver.

1. Update the start date and end date for the delegation in the From Date and To Date fields.

2. Click <Save>. All financial transactions in EFS will now route to the alternate employee or proxy during the set time frame.

DELEGATE APPROVAL IN MYU FOR MANAGERS

Transactions identified on the Managing Delegations page include human resources transactions as well as financial transactions.

Log in to MyU (myu.umn.edu). Navigate to: Manager Info > Delegate Approval.
Delegate Approval Responsibilities (cont.)

DELEGATE APPROVAL

1. Click <Create Delegation Request> on the Managing Delegations page.
2. Enter the start date and end date for the delegation in the From Date and To Date fields.
3. Click <Next>.
4. Select the checkbox next to the transaction types that should be delegated to a proxy (an employee within your unit’s hierarchy).
5. Click <Next>.
6. Select the checkbox next to the proxy who has the authority to act on your behalf for the selected transactions. Note: Click <Search by Name> to search for a proxy outside of your hierarchy).
7. Click <Next>.
8. The Delegation Detail page reflects the transactions you have authorized the proxy to review in your absence.
9. Click <Submit>.
10. A confirmation screen indicates the submission of the delegation request to the selected proxy.
11. Click <OK>.

- The proxy will receive a notification of your delegation request and has the option to accept or reject your request. Be certain the request has been accepted or the transactions will not be reviewed in your absence.
- Click <My Proxies> on the Managing Delegations page to review the status of the request.
- The delegation will expire based on To Date entered in the delegation request. If the delegation needs to be revoked prior to the end date, follow the “Revoke Approval” steps below.

REVOKE APPROVAL

1. Click <Review My Proxies>.
2. Select the checkbox next to the transactions that should be revoked. Note: Use the Show Request Status drop-down field to sort delegations by Accepted, Ended, Rejected, Revoked, or Submitted if desired.
Delegate Approval Responsibilities (cont.)

3. Click <Revoke>.
4. Click <Yes - Continue>.
5. A confirmation screen indicates the successful revoking of the delegation from the proxy.
6. Click <OK>.

On the Manage Delegations page, click <Learn More about Delegation> to view additional information about this process.