



Delegation of Approval Authority for Sponsored Projects

Award Information	
Principal Investigator Name:	
Department:	
Sponsor Award Number:	
Sponsor:	
UND Award / Project Number:	
Award Period Start Date:	
Award Period End Date:	
Period Budget:	
Primary Financial Reviewer for Award:	

List the individual authorized to approve *financial transactions in Jaggaer* on this sponsored award. This individual, and the authorizing PI, should sign this form and retain a copy in the department files.

Name	Invoices (not including Subrecipient invoices) (X)

PI Delegation Authorization			
The designated delegate, named above, has firsthand knowledge of the day-to-day activities supported by this sponsor. They have an in-depth understanding of the project scope of work and sponsor requirements and guidelines governing this account's funding.			
PI Signature:		Date:	

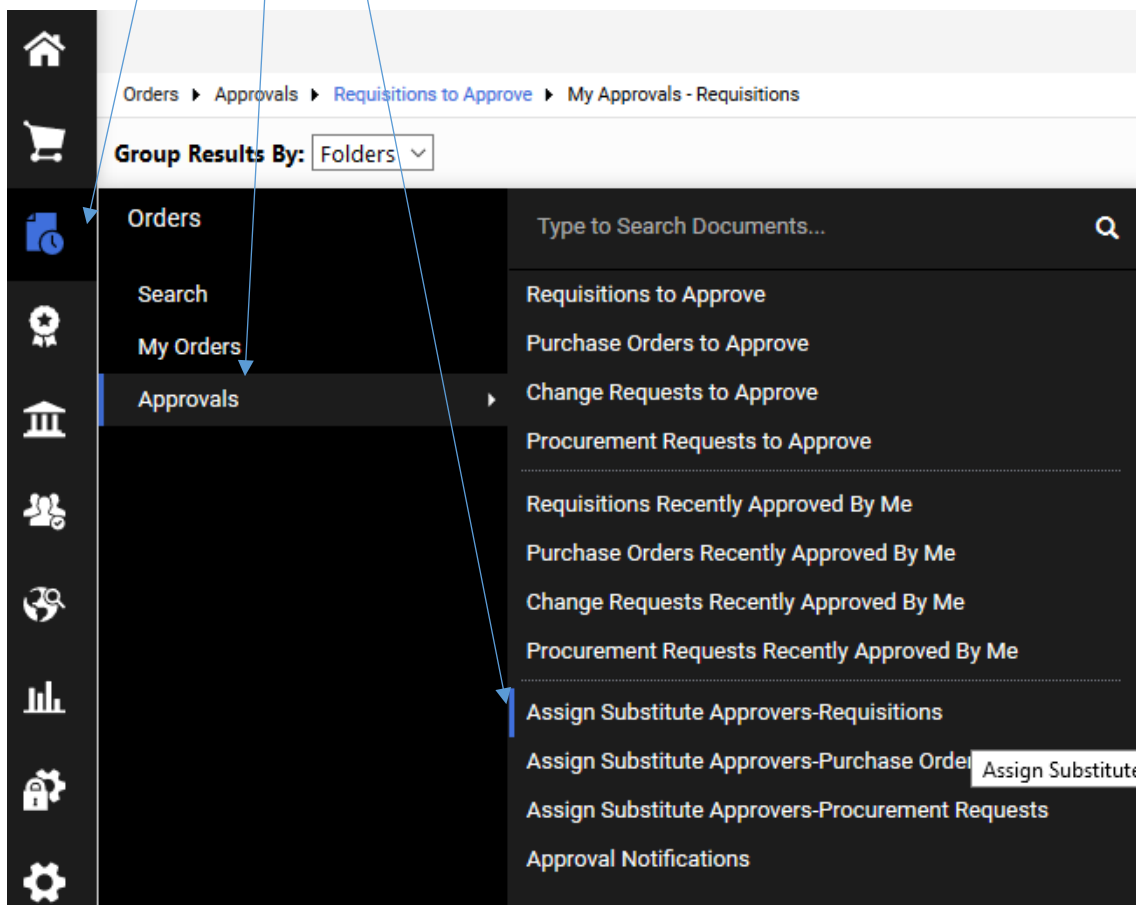
Delegate Certification			
I certify that I have firsthand knowledge of the day-to-day activities supported by the above sponsor. I have an in-depth understanding of the project's scope of work and sponsor requirements and guidelines governing this award. I will review and approve invoices in a timely manner consistent with the relevant terms and conditions of the award.			
Delegate Signature:		Date:	

Assigning a Substitute Approver

To setup a designated delegate approver follow the directions below.

Please note, the delegate will need an approver role. If you cannot designate this person following the directions below please contact procurement and payment services at UND.PPS@UND.edu to request that individual have the approver role added (please attached the delegation of approval form to your email).

- (1) Click orders in the left hand column
Choose **Approvals**
Choose **Assign Substitute Approvers-Requisitions.**



(2) Select each project as applicable

Select the **Substitution Actions** and select **Assign Substitution to Selected Folders**

IMPORTANT: do not select “Assigned PR Approvals” or “Assign Substitute to All Request Folders” as this will not only assign the project folders but any other approvals folders that may be assigned to you currently or in the future.

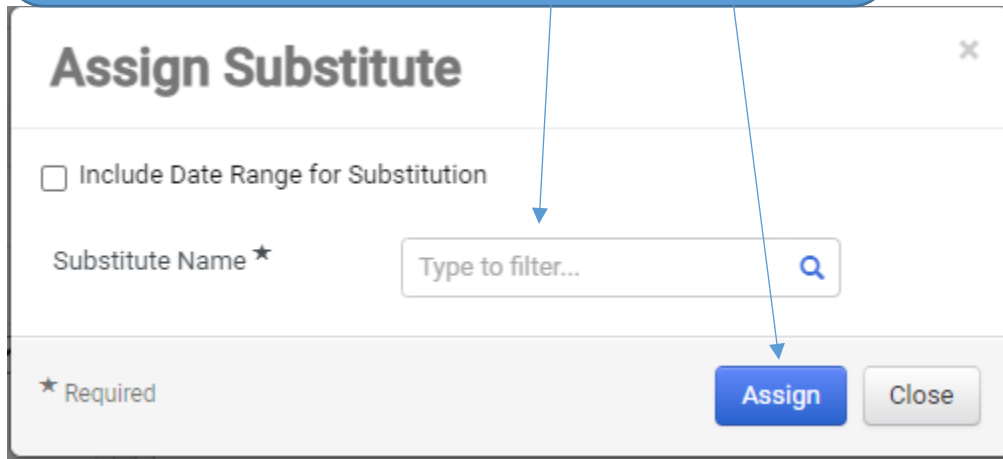
As new projects are added the process will need to be followed again.

The screenshot shows a web application interface for managing substitutions. At the top, there are two buttons: "Assign Substitute to All Requisitions Folders" (highlighted in blue) and "End Substitute for All Requisitions Folders". Below these, it says "Showing 1 - 8 of 8 Results" and "All Folder Results". There are dropdowns for "Results Per Page" (set to 20) and "Sort by" (set to "Folder name ascending"). A "Substitution Actions" dropdown menu is open, showing "Assign Substitute to Selected Folders" as the selected option. Below the menu is a table with the following columns: "Folder Name", "Approver", "Substitute", "Action", and a checkbox. The table lists eight folders, all of which are project folders (starting with "Project-PI:"). The "Action" column for each folder contains a blue "Assign" button and a checked checkbox. A red box highlights the "Assign" buttons and checkboxes for the project folders. At the bottom, there is another "Results Per Page" dropdown (set to 20) and a "Page 1 of 1" indicator.

Folder Name	Approver	Substitute	Action	
Assigned PR Approvals			Assign	<input type="checkbox"/>
Project-PI: UND0020065 (Role of Novel Endolysosome-Dep): (All Values)			Assign	<input checked="" type="checkbox"/>
Project-PI: UND0020581 (Role of Novel Endolysosome-UG): (All Values)			Assign	<input checked="" type="checkbox"/>
Project-PI: UND0022516 (Ketogenic Diet: Epigenetics an): (All Values)			Assign	<input checked="" type="checkbox"/>
Project-PI: UND0023117 (Tat endolysosome escape and HA): (All Values)			Assign	<input checked="" type="checkbox"/>
Project-PI: UND0023444 (Effects of Opiates on Neurons): (All Values)			Assign	<input checked="" type="checkbox"/>
Project-PI: UND0024564 (Great Plains IDeA-CTR Year 4): (All Values)			Assign	<input checked="" type="checkbox"/>
Project-PI: UND0025760 (Great Plains IDeA-CTR Year 5): (All Values)			Assign	<input checked="" type="checkbox"/>

(3) Enter the appropriate delegate name.

If you want to add a date range check the box for include Date Range then click Assign.



The 'Assign Substitute' dialog box features a close button (X) in the top right corner. It contains a checkbox labeled 'Include Date Range for Substitution'. Below this is a text input field for 'Substitute Name' with a star icon indicating it is required, and a search icon to its right. A blue callout box points to the search icon with the text '(3) Enter the appropriate delegate name.' and to the 'Assign' button with the text 'If you want to add a date range check the box for include Date Range then click Assign.' The 'Assign' button is blue, and the 'Close' button is grey.

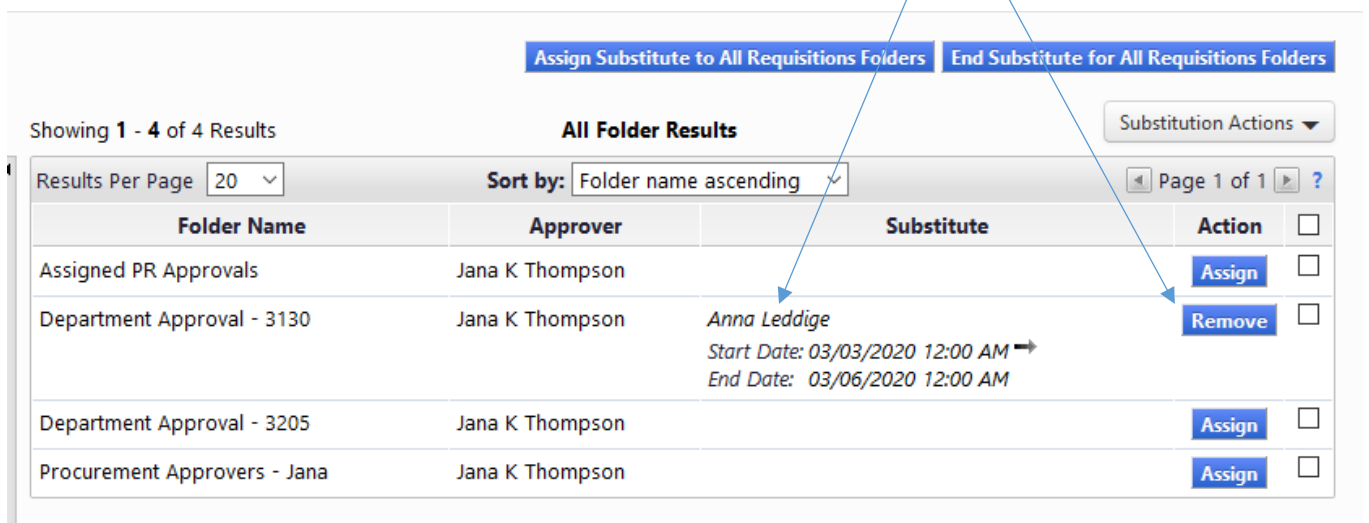
Assign Substitute

☐ Include Date Range for Substitution

Substitute Name ★

★ Required Assign Close

(4) You will then see the delegate listed under the substitute area. They can be removed at any time by clicking Remove.



The 'All Folder Results' table shows a list of folders with their approvers and assigned substitutes. A blue callout box points to the 'Assign' button for the 'Department Approval - 3130' row with the text '(4) You will then see the delegate listed under the substitute area. They can be removed at any time by clicking Remove.' The table includes columns for Folder Name, Approver, Substitute, and Action. The 'Department Approval - 3130' row shows the substitute 'Anna Leddige' with a date range from 03/03/2020 12:00 AM to 03/06/2020 12:00 AM.

Assign Substitute to All Requisitions Folders End Substitute for All Requisitions Folders

Showing 1 - 4 of 4 Results **All Folder Results** Substitution Actions ▼

Results Per Page 20 Sort by: Folder name ascending Page 1 of 1 ?

Folder Name	Approver	Substitute	Action	
Assigned PR Approvals	Jana K Thompson		Assign	<input type="checkbox"/>
Department Approval - 3130	Jana K Thompson	Anna Leddige Start Date: 03/03/2020 12:00 AM → End Date: 03/06/2020 12:00 AM	Remove	<input type="checkbox"/>
Department Approval - 3205	Jana K Thompson		Assign	<input type="checkbox"/>
Procurement Approvers - Jana	Jana K Thompson		Assign	<input type="checkbox"/>

(5) Repeat the process for Invoices. Select the dropdown menu and select invoices then proceed to step 2.

Note: invoices will be rare occurrence as most of the approvals occur on the requisition state.

The screenshot displays a procurement system interface. On the left is a dark sidebar with icons for a clock, a star, a building, people, a magnifying glass, a bar chart, a padlock, and a gear. The main content area has a light gray background. At the top right, it says 'Showing ' followed by a dropdown arrow. Below this is a table with the header 'Results F' and several rows, each starting with 'Departm'. The main section contains two white boxes. The first box, titled 'Search Details', has a 'Filtered by' section with 'Type: Invoices'. The second box, titled 'Refine Search Results', has a 'Type' section with a dropdown menu. The dropdown menu is open, showing a list of options: 'Invoices' (highlighted with a blue arrow from the text box above), 'Sourcing Event - Approvals', 'Sourcing Event - Evaluation', 'Requisitions', 'Purchase Order', 'Form Request', and 'Contracts'. The 'Invoices' option is currently selected in the dropdown.

Search Details

Filtered by

Type: Invoices

Refine Search Results

Type

Invoices

Sourcing Event - Approvals

Sourcing Event - Evaluation

Requisitions

Purchase Order

Invoices

Form Request

Contracts

Showing ' Results F

Departm

Departm

Departm

Departm

Departm

Missing

My Invoi

Procurer

Procurer

Procurer

Procurer

Procurer

Procurer