eReq
eProcurement Web Requisition System

Research Foundation
Delegate Authorization System

Procurement Services – Purchasing

Teamwork - Progressiveness - Professionalism – Respect
May 2006
Table of Contents

Screens & Glossary
I  Login Screen.........................................................................................3
II  PI Account Screen..................................................................................4
III Account Authorization..........................................................................6

User Instructions

I  Add Delegate..............................................................................................8
II  Add Authorization Rule...........................................................................10
III Add Additional Delegate.........................................................................13
IV  Edit Delegate...........................................................................................15
V   Delete Delegate.......................................................................................17
VI  View Delegate Associated with Accounts.................................18
**What is it?**

This system is part of the eReq product that will allow the Principle Investigator (PI) to grant approval authorization for his accounts (Award, Project, Task) to other individuals; i.e. Delegates.

**Screens and Glossary**

I. **Login Screen**

![Login Screen Image](image)

This is the first screen that is displayed when you are logging onto the eReq RF Delegate Maintenance system. You must enter the *UBIT user ID and password* (A) and then click on the “Login In” button.

The “Logout” button (B) can be used to leave the system at any point in the processing. It is recommended to Logout once all work is complete.
II. PI Account Screen (Without Delegates Assigned)

This will be the first screen that is displayed after a PI has logged into the system. It contains the list of Accounts (A) (Awards, Projects, Tasks) assigned to the PI.

The area indicated by the letter (B) is used to find and add a Delegate who is being given permission to authorize purchases for one or more Accounts contained in list (A).

The “Search” button is clicked to bring up a screen (search browser) where a name is entered as search criteria in order to find the delegate who is to be added.

Once the person is found and selected, the “Add Delegate” button is used to add this person as a delegate to existing accounts. It will then bring up another screen where the actual accounts can be assigned.

<table>
<thead>
<tr>
<th>Award</th>
<th>Project</th>
<th>Task</th>
<th>Award</th>
<th>Project</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The icon will display the approved delegates for that account.
III. PI Account Screen (With Delegates Assigned)

In addition to the description of the PI Account Screen in section II above, there are several other fields listed once a Delegate has been assigned.

The “My Delegate List” (E) contains all delegates that have been successfully added. When highlighted or when the radio button is selected, the accounts for that Delegate are highlighted in blue in the “My Account List” (A) at the bottom of the screen.

The “Edit Delegate” (F) button allows the PI to edit existing delegate authorization.

The “Delete Delegate” (G) button allows the PI to completely delete the selected delegate’s approval authority.

The Delegate name (H) is an additional person that the PI wishes to grant authorization rights. It results from a search of potential faculty and staff.
IV. Account Authorization Screen

This screen allows the PI to create, edit or delete authorization rules for his accounts for the selected Delegate, and then display them in a summary form.

“Currently Delegating To” (A) lists the person you are giving delegation authority to and lists all the accounts they have delegation authority for below in the “Accounts delegated to this person” section (B). In addition, the Accounts that are authorized by any given rule are highlighted in Section (B). Click on the radio button next to the rule to see the corresponding Accounts.

“Can Grant” (C) column (aka, DAP- Delegation Approval Permission) is checked only if you wish to allow the selected Delegate the ability to delegate approval authority to other delegates for the accounts they can approve.

It should be noted that the use of the value “ALL” in the three “Award/Project/Task” (D) columns gives the Delegate approval authority on all existing and future accounts.

The dropdown lists for “Award/Project/Task” (D) allow you to individually create rules for specific accounts using the dropdown arrows. Once an Award or Project is selected, you will see only the associated information for that choice in the remaining categories.

The “Add New Rule” (E) button saves the created rule (ie., the selected Award, Project and Task combination).
IV  Account Authorization Screen (cont’d) ~

The “Change Selected Rule” (F) button saves the changes that have been made to the Award/Project/Task columns for the specific authorization rule that was selected by clicking on the radio button (the rule is highlighted in pale yellow).

The “Delete Selected Rule” (G) button removes the specific authorization rule that was selected by clicking on the radio button (the rule is highlighted in pale yellow).

The “Reset” (H) button changes all available Account columns (Award, Project, Task) in the dropdown lists to the value of “ALL”. This, in effect, allows all available Accounts in the dropdowns to be viewed again so that a new rule can be defined.

The “Back” (I) button returns the program to the PI Account Screen.
User Instructions

I. Add a Delegate

1. Logon to the eReq RF Delegate Maintenance program using the following URL:  
   http://www.business.buffalo.edu/UBSApp/apps/RFApps/ereqsecurity/  
   OR  
   Go to http://ubbusiness.buffalo.edu under RESEARCHER \(\Rightarrow\) AUTHORIZED SIGNATURES \(\Rightarrow\) eREQ DELEGATES

2. Log into the system using your UBIT user name and password.

3. The first time you enter the system there will be no delegates and your screen will look like this:

   ![Screen Shot](image)

<table>
<thead>
<tr>
<th>Award</th>
<th>Project</th>
<th>Task</th>
<th>Award</th>
<th>Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>MULTICLASS, Type 2 Diabetes</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RESEARCH IN COMMUNITY HEALTH, CORONARY HEART DISEASE, DIABETES</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RESEARCH IN COMMUNITY HEALTH, CORONARY HEART DISEASE, DIABETES</td>
<td>1</td>
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<td>1</td>
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</tr>
<tr>
<td>RESEARCH IN COMMUNITY HEALTH, CORONARY HEART DISEASE, DIABETES</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. Enter the Delegate’s UBIT name in Box (A) and then click TAB. If you do not know the Delegate’s UBIT name, click on the Search button. The following screen will be displayed:

   ![Screen Shot](image)
I. Add a Delegate (cont’d) ~

5. Enter the Delegate’s Last Name in the NAME field and click on the Submit Query button. You will see a list of all Names that have the letters you entered in the NAME field, along with the UBIT Name and Person Number.

6. Click on the UBIT Name of the person to whom you will be delegating your accounts. The following screen will be displayed:

7. The person you selected on the previous screen is now displayed in bright yellow. Validate that this is the correct person and then click on the “ADD DELEGATE” button to add the delegate to the list and to proceed to the screen where the Accounts will be assigned.
II. Add an Authorization Rule

8. The following Account Authorization screen is now displayed so that you can specify the particular Accounts this person is authorized to approve.

When you initially come into the screen, the dropdowns for Award, Project, and Task are defaulted to ALL. If you wish to permit this Delegate to approve all of your Accounts, do not change the dropdowns and click on the ADD NEW RULE button. [It should be noted that in doing so, any future additional Accounts will automatically be included in this authorization rule.]

9. When you click on the ADD NEW RULE button, a screen will be displayed that shows the added Account Rule in a list of rules for this Delegate. I will now show instructions for adding authorization rules for individual accounts.

10. Click on the dropdown for the Award field to display all available Awards. Click on the Award number you wish to select.
II Add an Authorization Rule (cont’d) ~

11. The Project numbers dropdown will contain all of the Projects that are associated with the selected Award number appearing in the Award column. Leave the Project field on “ALL” if you desire to grant permission to this Delegate to approve ALL Projects under this Award.

To select only one Project for this Award, click on the appropriate Project number in the dropdown. In the example below, there is only one project, but it will be selected to limit any future projects from being erroneously included.

<table>
<thead>
<tr>
<th>Award</th>
<th>Project</th>
<th>Task</th>
<th>Can Grant</th>
</tr>
</thead>
<tbody>
<tr>
<td>557790</td>
<td>ALL-ALL</td>
<td>ALL</td>
<td></td>
</tr>
</tbody>
</table>

Accounts delegated to this person

12. The Task numbers dropdown will contain all of the Tasks that are associated with the selected Award/Project combination. Leave the Task field on “ALL” if you desire to grant permission to this Delegate to approve ALL Tasks under this Award/Project.

To select only one Task for this Award/Project, click on the appropriate Task number in the dropdown. In the example below, All Tasks will be included for the selected Award/Project.

13. To save this choice of Account Authorization for this Delegate, click on the ADD NEW RULE button. The Award, Project, Task combination will be displayed on the top of the form under the “Currently Delegating To” list (highlighted in pale yellow and the radio button selected), and all the specific accounts included by this “rule” will be listed (and highlighted) at the bottom of the screen in the “Accounts Delegated To” section.
The following screen will be displayed:

14. In this example, a second authorization “rule” will be defined following the steps as outlined above in #10 thru #13 (pages 10-11) after clicking on the button. A rule to give this Delegate approval authority for Award/Project/Task equaling “25243-8887745-ALL” will be added.

The new “rule” is now highlighted in pale yellow, and the radio button is selected. Further, only the included Accounts for this rule are highlighted in the “Accounts Delegated” list below. Please note that the two accounts that are defined by the second “rule” are listed but not highlighted.

Therefore, clicking on the radio button next to the “rule” will highlight the associated Accounts in the list at the bottom of the screen.

The following screen will now be displayed:
III. Add an Additional Delegate

1. Return to the PI Account Screen by clicking on the Back button of the Account Authorization Screen.

Please note in the following screen that the Delegate that was previously added is now displayed under the “My Delegate List”, and all of the Accounts she is permitted to approve are highlighted in the “My Account List” below.

2. Enter the second Delegate’s UBIT name in Box (A) and then click TAB. If you do not know the Delegate’s UBIT name, click on the Search button and follow the instructions as defined in #4 thru #7 (pages 8-9) of the “Add a Delegate” section of this document.
III Add an Additional Delegate (cont’d) ~

The following screen will be displayed:

3. For this new Delegate, add all pertinent Account Authorization Rules using the process as defined above in #8 thru #14 (pages 10-12) in the “Add an Authorization Rule” section of this document.

4. The resulting PI Account Screen now contains two Delegates, and the new Delegate and his Account are highlighted. (as shown below)
eReq Research Foundation Delegate Authorization System

IV. Edit a Delegate

Reason:

1. Add an Account Authorization Rule
2. Change the Award/Project/Task of an existing Account Authorization Rule
3. Delete an existing Account Authorization Rule

How To:

1. On the PI Account Screen, click the radio button of the appropriate Delegate

2. Click on the Edit Delegate button

3. The Account Authorization Screen will be displayed

4. Perform the desired process
   a) Add New Rule -- follow instructions in Add Authorization Rule section (pages 10-12) above
   b) Change Selected Rule -- check the radio button of the rule that will have its Award/Project/Task combination modified

Make the necessary changes to the Project or Task fields for that Award. Click on the “Change Selected Rule” button to complete the change.
c) [Check box] - check the radio button of the rule that will be deleted

<table>
<thead>
<tr>
<th>Award</th>
<th>Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>002701</td>
<td>8888888-</td>
</tr>
</tbody>
</table>

Click on the “Delete Selected Rule” button to remove the rule.

5. Click on the Back button to return to the PI Account Screen
V. **Delete a Delegate**

**Reason:**

1. Delete an existing Delegate and all of his Account Authorization Rules

**How To:**

1. On the PI Account Screen, click the radio button of the appropriate Delegate

<table>
<thead>
<tr>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PF AFF, KRISTEN</td>
</tr>
<tr>
<td>PF AFFMAN, RYAN J</td>
</tr>
</tbody>
</table>

2. Click on the Delete Delegate button [Delete Delegate]

3. The system will display this question asking for validation of the delete

4. Answer “OK” if you wish to delete the Delegate – his name will disappear from the Delegate List on the PI Account Screen, and the Accounts he had permission to approve will no longer be highlighted.

5. Answer “Cancel” if you do not wish to delete the Delegate – all of the information on the PI Account Screen will remain unchanged.
VI. View All Delegates Assigned to Accounts

There is a feature on the PI Account Screen where it is possible to view a list of all delegates who have been authorized to approve a particular Account in the “My Accounts” list.

In the example above, the Accounts that are highlighted have been assigned Delegates who are allowed to approve requisitions using these Accounts.

Click on of the Account to open a screen that will display the assigned Delegates’ names who have approval authority for that Account.

Click on the button to close this screen and return to the PI Account Screen.