

How to Assign a Jaggaer Approver Delegate

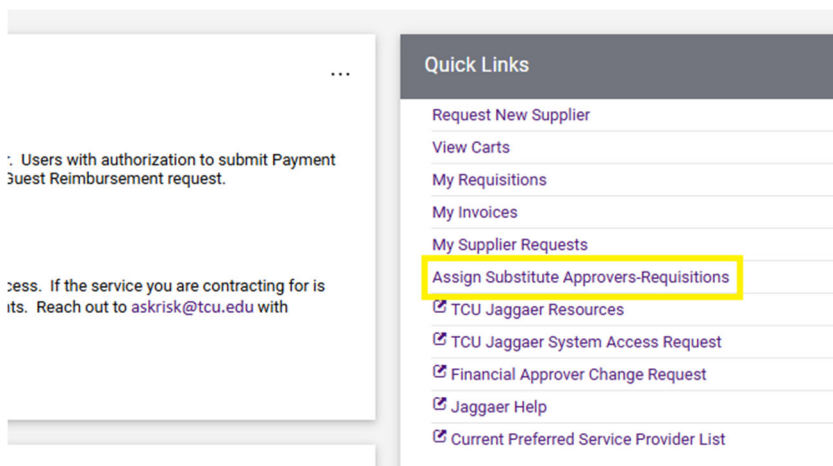
If you are an approver in Jaggaer (this includes all levels of approvers), you may delegate your approval.

- If you plan to be out of the office for less than three months, this document will demonstrate how you may delegate your approval in Jaggaer.
- If you plan to be out of the office for greater than three months, request a permanent Financial Approver Change in Jaggaer under the Jaggaer & Concur Approval Changes section on the Shopping Homepage.

Jaggaer & Concur Approval Changes

Financial Approver Change Request

- 1) To assign a delegate in Jaggaer, from the Jaggaer Shopping Homepage, select the Assign Substitute Approvers-Requisitions Quick Link



- 2) Identify the Folder Name(s) you want to delegate and select the box on the far-right column. If you want to select all folders, select the box in the gray line.

Example 1 – Selecting specific folder(s). Select Folder(s) and then select Assign

Results Per Page	20	Sort by:	Folder name ascending		Page 1 of 1	?
Folder Name	Approver	Substitute	Action			
Do Not Use – FYE Check for Late Approvals	Ali Rattan		Assign	☐		
Guest Reimbursement	Ali Rattan		Assign	☐		
Honorarium	Ali Rattan		Assign	☐		
International Honorarium	Ali Rattan		Assign	☒		

Example 2 – Selecting all folders. Select box in gray line, then select Assign Substitute to All Requisitions Folders.

Logout

Assign Substitute To All Requisitions Folders			
Substitution Actions			
ending ▾	Approver	Substitute	Action
	Ali Rattan		Assign
	Ali Rattan		Assign
	Ali Rattan		Assign

- 3) Assign Substitute. *Recommended users include a date range for substitution.* Complete the required fields and select Assign.

Assign Substitute

☒ Include Date Range for Substitution

Substitute Name *

Wood, Abby

Start Date *

10/28/2025 05:00 PM

End Date *

11/03/2025 08:00 AM

★ Required

Assign

Close

- 4) Users may remove substitutes by selecting Remove from individual folders, or by selecting End Substitute for All Requisitions Folder. *Assignments will automatically roll off if users assigned a date range.*

The screenshot shows a web interface for managing substitutions. At the top, there are two buttons: "Assign Substitute To All Requisitions Folders" and "End Substitute For All Requisitions Folders", both highlighted with yellow boxes. Below these is a "Substitution Actions" dropdown menu. The main area displays a table of substitutes for "Abby Wood". Each row includes the name, start and end dates, and an "Action" column with a "Remove" button. The "Remove" buttons are highlighted with yellow boxes. The table is on "Page 1 of 1".

Substitute	Action
Abby Wood Start Date: 10/28/2025 5:00 PM → End Date: 11/03/2025 8:00 AM	Remove
Abby Wood Start Date: 10/28/2025 5:00 PM → End Date: 11/03/2025 8:00 AM	Remove
Abby Wood Start Date: 10/28/2025 5:00 PM → End Date: 11/03/2025 8:00 AM	Remove
Abby Wood Start Date: 10/28/2025 5:00 PM → End Date: 11/03/2025 8:00 AM	Remove
Abby Wood Start Date: 10/28/2025 5:00 PM → End Date: 11/03/2025 8:00 AM	Remove

Important Information

- If the person you want to assign as a delegate is not listed when searching, that person does not have the Approver role in Jaggaer, and therefore you cannot delegate your approval to that person.
- Once a delegate is assigned, the delegate will receive approval email notifications for submissions started *after* they were assigned as a delegate. Delegates *will not* receive an approval email notification for submissions started *prior to* delegation, however the submission will be listed under the Action Items of the delegate's Jaggaer Shopping Homepage and delegates may approve.
- Some users have more than one approver role type (ex-Requisitions and Contracts). To delegate approvals in more than one role, use the dropdown under Type and select applicable types. For each type, assign delegates from the folders listed as needed.

The screenshot shows a search interface. On the left, under "Search Details", the "Filtered by" section shows "Type: Requisitions". Below this, the "Refine Search Results" section has a "Type" dropdown menu. The dropdown is open, showing "Requisitions" (highlighted with a yellow box) and "Contracts" (also highlighted with a yellow box). On the right, a list of search results is displayed, including "Do Not Use - FYE Check for Late Appro", "Guest Reimbursement", "Honorarium", "International Honorarium", "International Payment Request", "International Wire", "My PR Approvals", "Payment Request", "Priority Honorarium", "Priority Payment Request", and "Priority Wire". The "Showing 1 - 12 of 12 Results" and "Results Per Page 20" are also visible.