PROPOSAL SUBMISSION

HOW TO MANAGE DELEGATES IN LEO
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For questions or support, contact ORSP at orsp@ohio.edu; 740.597.6777
INTRODUCTION

- A delegate is a person entrusted to represent the authorized signatory on a proposal transmittal.
- A delegate assumes the same responsibilities as the authorized signatory for an associated unit.
- Organizational units can use the delegate function to manage certain roles and responsibilities within LEO.
ROLES AND RESPONSIBILITIES

• **PI** – Responsible for the overall development and content of the proposal; may delegate aspects of preparation to administrative and scientific staff, but remains ultimately responsible for all aspects of the proposal as submitted.

• **Chair/Department** – Responsible for approving the proposal content, including scope of work, commitment of department space, and other resources needed to carry out the project. Assure PI status.

• **Dean/College** – Reviews, advises, and approves proposals. Ensure either the department or Dean’s office meets space and other resource commitments in the proposal, such as cost sharing or funding of salaries. Works with department to respond to ORSP proposal review comments and indicates confirmation of any exceptions prior to submission.
DELEGATE TYPES

- **Read only**: (no boxes checked) The delegate is able to access and download documents within the associated unit.

- **Notifications**: The delegate will receive emails when a transmittal, departmental guarantee memorandum (DGM), extension or an award letter is approved.

- **Approve and Deny Transmittals**: The delegate has permission to approve and deny transmittals, extensions, conflict of interest, DGM’s, etc. at the organizational unit level.

- **Administrator**: The delegate has permission to add, delete and modify delegates at the organizational unit level.

- **Associate Dean of Research**: Used for limited submission opportunities. The delegate will receive opportunities related to limited submission opportunities.

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To manage delegates you can either use the drop-down menu or the LEO home page.

To add delegates you must be a delegate administrator to an organizational unit. If you do not see the menus to the left, and you are a chair or a dean, then contact orsp@ohio.edu.
ACCESS MANAGE DELEGATES IN LEO

Expand Manage Transmittal Routing Tables (click the plus sign).

Click on the organizational unit you want to modify. If there are no units listed, you are not a delegate with permission to modify the organizational unit.
ADD A DELEGATE

1) Choose a organizational unit to manage. Click on the person with a pencil icon.

2) Click the “Add Delegate” icon.
ADD A DELEGATE

1) Type in the last name of the person you wish to add. Choose the proper person from the list that appears.

2) Choose the roles you wish them to have.

3) Provide a comment as to why you are adding the user and their roles.

4) Click “Add Delegate” button.
1) Choose which person you want to delete then select the delete icon next to that user.

2) Provide a reason as to why you are deleting the delegate.

3) Click the delete button.
UPDATE DELEGATE ROLES

1) Select or unselect the roles you wish to add or remove.

2) Provide a comment as to why you are switching the users roles.

3) Click the “Update Delegates” button.

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TIPS

• Before delegating signature authority for transmittal routing, make sure the person understands their responsibility for reviewing and approving the proposal.

• The reason for adding a delegate should be reasonable and fully documented, in the event an audit of the system is performed.

• Remember that adding a delegate gives that person full access to the system at the organizational unit level.