

TRAVEL APPLICATION

Delegate

HELPFUL HINTS

A delegate can prepare for another employee; however only the employee can submit a non-travel expense report.

An employee must first assign another employee as their delegate.



Supported browsers:

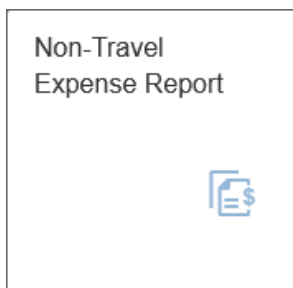
- PC: Chrome and Edge
- Macintosh: Chrome and Safari

PROCEDURE

Within Firefly, click on the *Travel and Expense Reporting* tile.



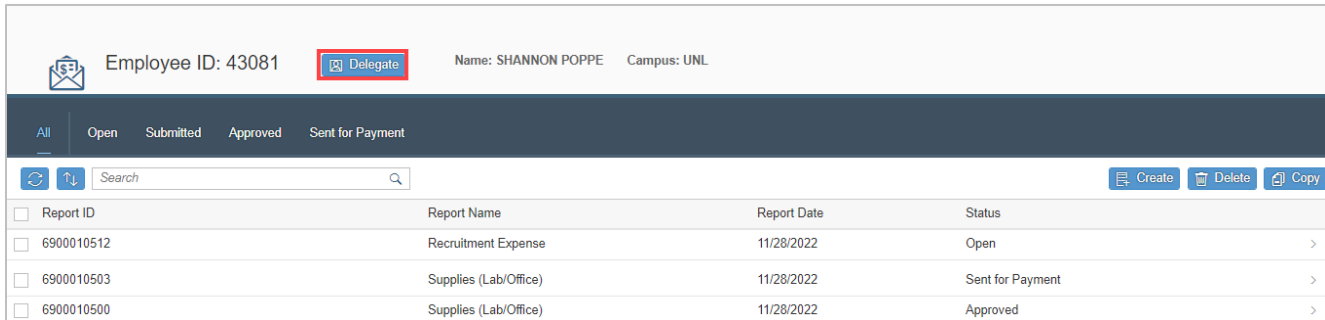
The travel page appears. Click *Non-Travel Expense Report*.



ACT AS A DELEGATE: NON-TRAVEL EXPENSE

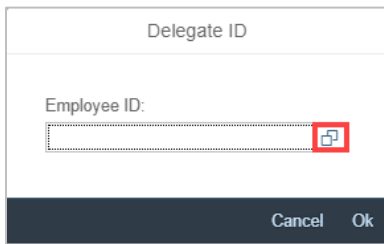
Updated February 6, 2023

The application opens to the user's personal travel profile. Click  Delegate.



Report ID	Report Name	Report Date	Status
6900010512	Recruitment Expense	11/28/2022	Open
6900010503	Supplies (Lab/Office)	11/28/2022	Sent for Payment
6900010500	Supplies (Lab/Office)	11/28/2022	Approved

In the pop-up box, click  to search for an employee.

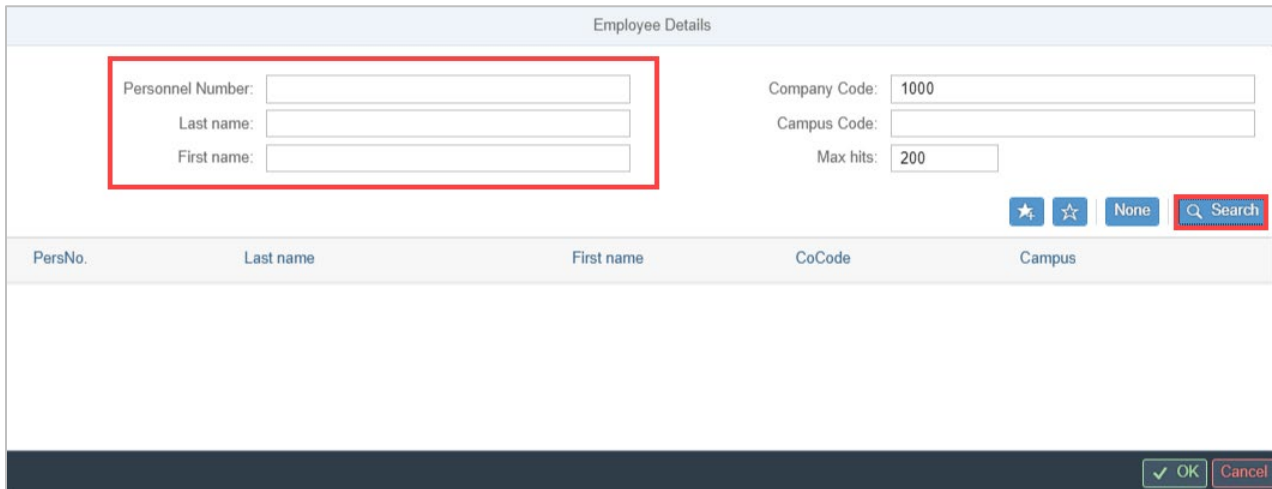


Delegate ID

Employee ID:

Cancel Ok

Enter any of the search criteria and click  Search.  Note: employees must assign delegates to act on their behalf. Only names that have been assigned will appear in the search.



Employee Details

Personnel Number: Company Code:

Last name: Campus Code:

First name: Max hits:

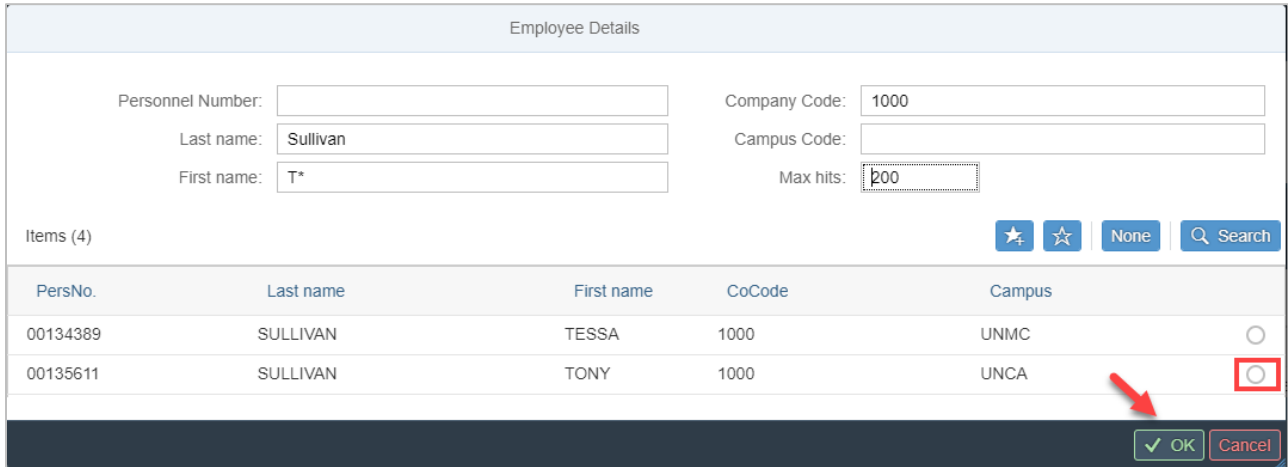
PersNo.	Last name	First name	CoCode	Campus
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OK Cancel

ACT AS A DELEGATE: NON-TRAVEL EXPENSE




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Select to the right of the employee's name and click .





Employee Details

Personnel Number: Company Code: 1000
Last name: Sullivan Campus Code:
First name: T* Max hits: 200

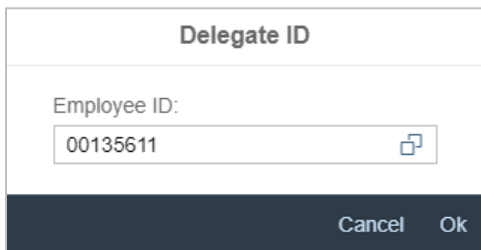
Items (4)   None  Search

PersNo.	Last name	First name	CoCode	Campus	
00134389	SULLIVAN	TESSA	1000	UNMC	<input type="radio"/>
00135611	SULLIVAN	TONY	1000	UNCA	<input checked="" type="radio"/>


 



 Note: an employee can be added to a personal list ("favorites") by clicking .

The *delegate ID* pop-up appears. Click .

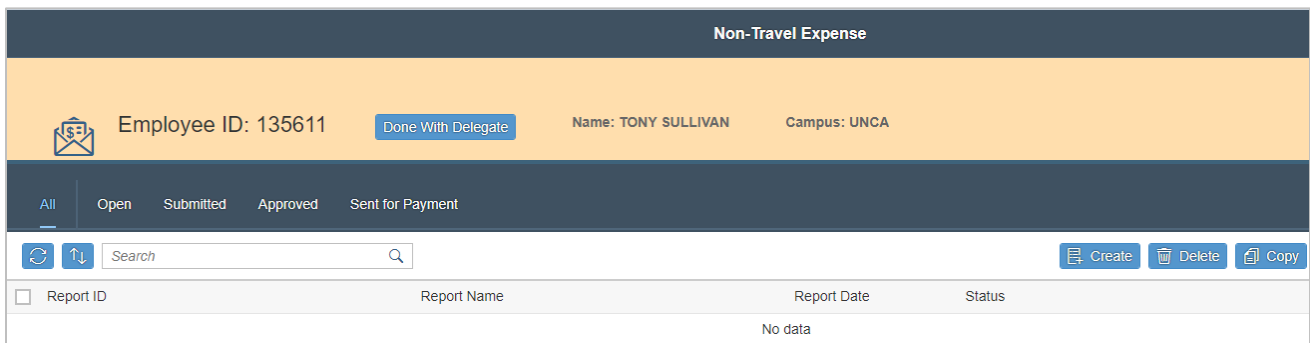


Delegate ID


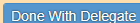
Employee ID:
 







The expense screen appears. The top panel is now a different color to indicate acting as another employee.



Non-Travel Expense

 Employee ID: 135611  Name: TONY SULLIVAN Campus: UNCA

All Open Submitted Approved Sent for Payment

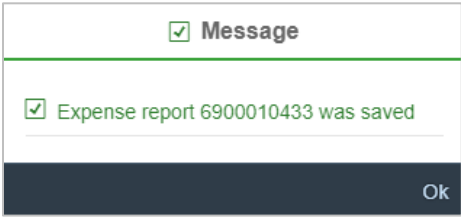
  Search    


Report ID	Report Name	Report Date	Status
No data			

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Create the expense report and click  Save. A confirmation pop-up message appears.



To notify the employee of the available expense report, re-open the report and click  Notify Employee. An email will be sent to the employee (example shown below) from the delegate's email address.

