

ACT AS A DELEGATE

TRAVEL APPLICATION

General

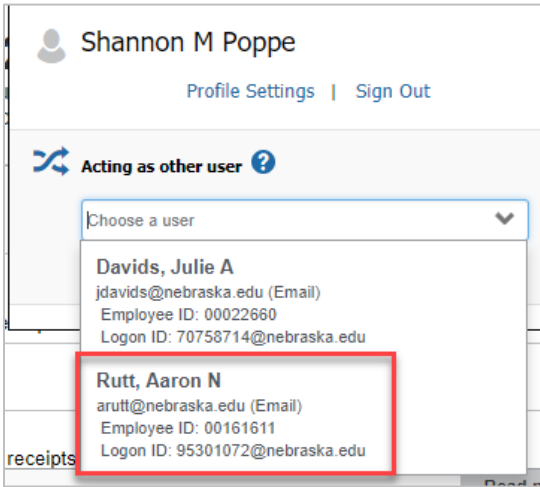
HELPFUL HINTS

- A traveler must assign the delegate role to an individual before that individual can act on their behalf.
- A delegate is limited to 250 travelers in their user list.
- Only the traveler can submit a travel request or an expense report.

PROCEDURE

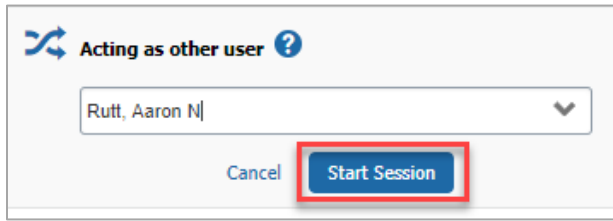
A delegate is a user who is granted permission to act on behalf of another user to perform tasks such as preparing travel requests and expense reports on their behalf. Only the traveler can submit a travel request or an expense report.

1. To act as a delegate for another user, click on Profile Settings. Click the dropdown field below *Acting as other user* option.
2. Enter all or part of the user's name.
3. Select the appropriate user from the list

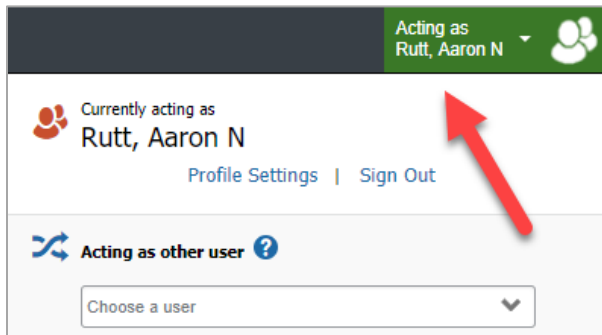


4. Click on Start Session.

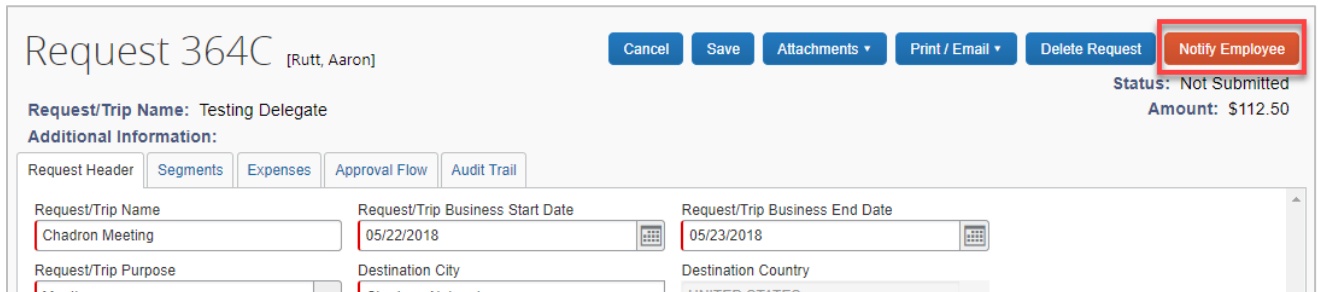
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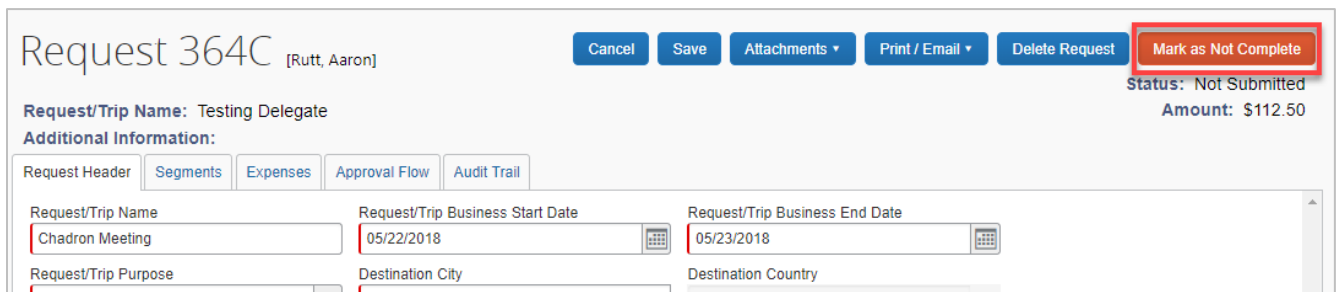
- With the session active, assigned delegate is enabled to perform entries for this user. The user will have pre-determined rights and privileges for their delegate. Note the profile color has switched to green.



- As a delegate, once the request or expense information is entered, click on **Notify Employee**. An email will be sent to the traveler notifying them the request or expense is ready to be reviewed and submitted.



- If changes are needed after clicking on **Notify Employee**, if the traveler has not submitted the travel request or expense report, click on **Mark as Not Complete**.



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- 8. To leave the session and return to individual requests (non-delegate), click on the “done acting for others” button.

