ASSIGN A DELEGATE

TRAVEL APPLICATION

General

HELPFUL HINTS

- Only the traveler can submit a travel request or an expense report.
- Delegate is a role similar to a travel coordinator.
- Within profile settings, an individual can add a delegate from either request delegates or expense delegates. Although titled differently, both function the same to add a delegate.
- If an approver only wants to assign a delegate to prepare requests and expense on their behalf, but not to approve on anything on their behalf, the approver should only select the first three checkbox options.

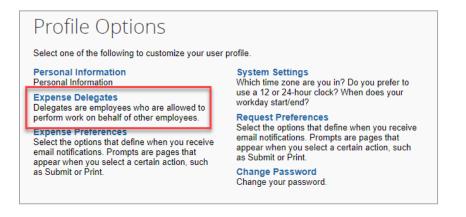
		Name	Can Prepare	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
		Rutt, Aaron arutt@nebraska.edu					06/18/2018		
ROCED	URE								

A delegate is a user who is granted permission to act on behalf of a traveler to perform tasks such as creating and entering requests and expense reports. Only the traveler can submit the request and expense for approval.

1. To assign a delegate, click profile, then profile settings.

						Administration - I Help -
SAP Concur 🖸	Requests	Expense	Approvals	Reporting +	App Center	Profile -
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Hello, Shannon				New	Requ Pro	ofile Settings

2. Under the Profile Options, click on Expense Delegates.





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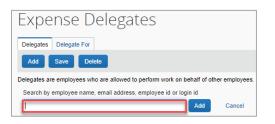


Updated September 24, 2018

3. Click on Add.



4. Enter all or part of the individual's name.



5. Select the user from the list, then checkmark the applicable checkbox(s) for roles.

Еx	Expense Delegates										
Dele	Delegates Delegate For										
Ad	Add Save Delete										
Delegates are employees who are allowed to perform work on behalf of other employees. Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.											
	Name	Can Prepare	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails			
	Davids, Julie jdavids@nebraska.edu										

Permissions:

For a delegate to act as a traveler (create a travel request or an expense report):

- $\circ\quad {\rm Can\ prepare}$
- Can view receipts
- o Receives emails

For a supervisor approver or financial approver who is assigning a user to temporarily approve on their behalf:

- Can approve: If an employee is currently a travel approver for assigned employees, this enables the delegate to approve travel on their behalf.
- Can approve temporary
- Can preview for approver
- Receives approval emails
- 6. Click on Save .
- 7. The user will now be able to act as a delegate and will see your name listed on their Delegate For tab.



