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.

PROCEDURE

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.

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

Permissions:
For a delegate to act as a traveler (create a travel request or an expense report):
- Can prepare
- Can view receipts
- 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.