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.

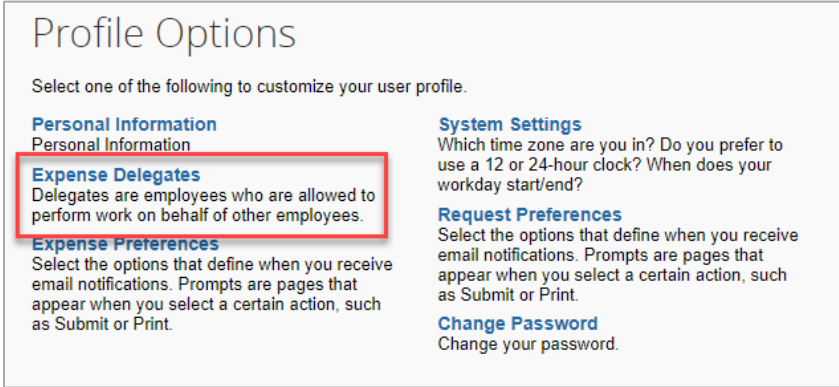|	Name	Can Prepare	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
☐	Rutt, Aaron arutt@nebraska.edu	☑	☑	☑	☐	☐ 📅 06/18/2018 📅 06/22/2018	☐	☐

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.

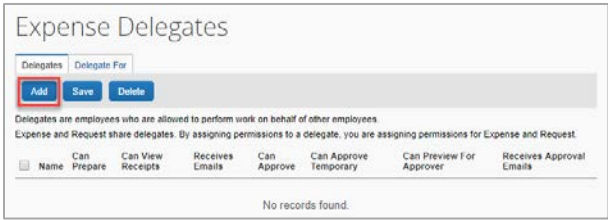1. To assign a delegate, click profile, then profile settings.
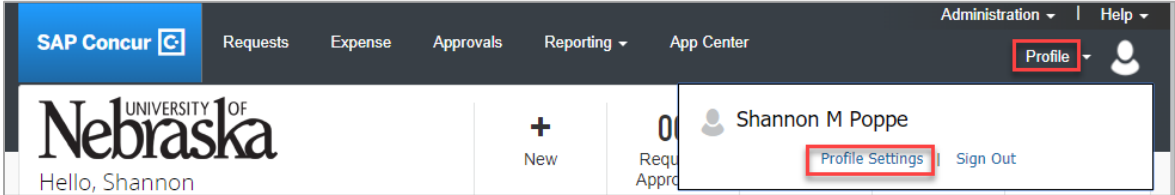
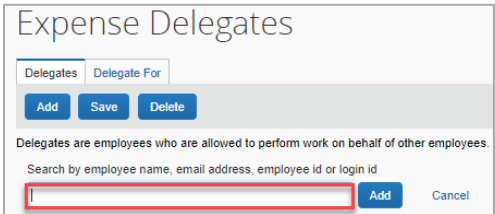2. Under the Profile Options, click on Expense Delegates.
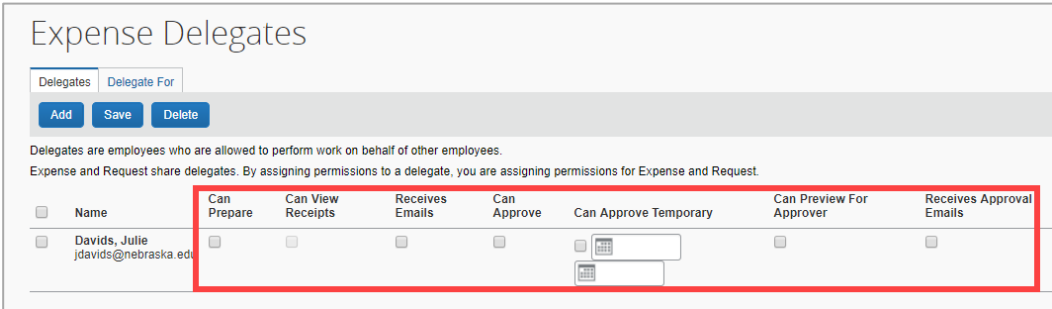
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3. Click on **Add**.

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):
- o Can prepare
- o Can view receipts
- o Receives emails

For a supervisor approver or financial approver who is assigning a user to temporarily approve on their behalf:
- o Can approve: If an employee is currently a travel approver for assigned employees, this enables the delegate to approve travel on their behalf.
- o Can approve temporary
- o Can preview for approver
- o 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.