

Assign a Delegate

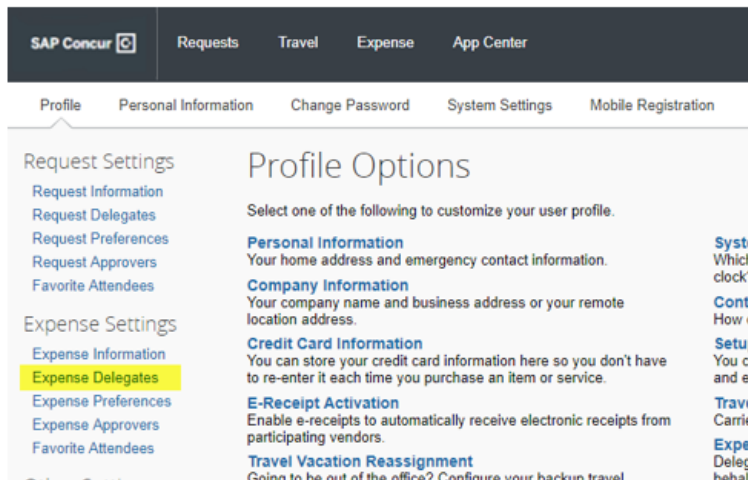
A Delegate (Travel Preparer) can be assigned in the system to do the following:

- Prepare your expense reports.
- View your receipts.
- Receive copies of your email notifications from the system.
- A Delegate **cannot** submit for the employee.

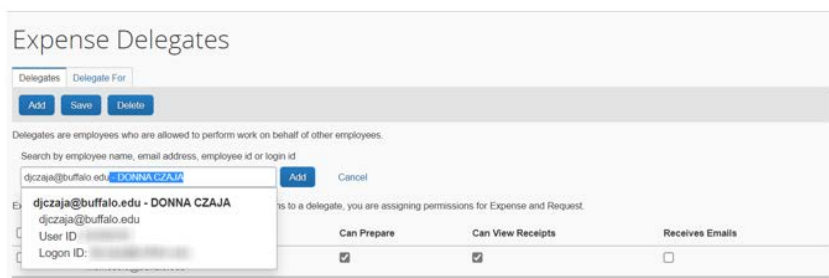
Please be sure to confirm with your department that this is allowed.

1. Assign Your Delegates

- At the top of the home page, click *Profile*, then click *Profile Settings*.
- In your profile *Expense Settings*, click *Expense Delegates* (Figure 1).



- **Request and Expense Settings share the same delegates.** Adding a delegate to either setting gives them permission to work in both the *Request* and *Expense* modules.
- Click *Add* and a search bar will appear.



- **Please assign the following Reimbursement & Procurement Specialists:**

Donna Grant (dmgrant3)
Kristen Guadagno (kcg3)
Madeline Milroy (mam45)
Teresa Olverd (teresaol)

- Select the person when they appear in the list.

2. Assign Delegate Permissions

- Figure 1 shows the available options if you have the capability to be an approver. Figure 2 shows the available options if you do not have the capability to be an approver. **Either way, please only check off the following boxes to make our team members delegates:**
Can Prepare - allow the delegate to prepare your expense reports.
Can View Receipts - allow the delegate to view and attach your receipts
- **When Finished, click Save.**

Figure 1

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
<input type="checkbox"/>	[Redacted Name]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> [Calendar Icon]	<input type="checkbox"/>	<input type="checkbox"/>

Figure 2

<input type="checkbox"/>	Name	Can Prepare	Can View Receipts	Receives Emails
<input type="checkbox"/>	[Redacted Name]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	[Redacted Name]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Definitions of Categories. Remember, only check off the highlighted ones below ("Can Prepare" and "Can View Receipts")

- **Can Prepare** - allow the delegate to prepare your expense reports.
- **Can View Receipts** - allow the delegate to view and attach your receipts.
- **Receives Emails** -- **DO NOT CHECK THIS OPTION**
- **Can Approve** – **DO NOT CHECK THIS OPTION**
- **Can Approve Temporary** – **DO NOT CHECK THIS OPTION**
- **Can Preview for Approver** – **DO NOT CHECK THIS OPTION**
- **Receives Approval Emails** - **DO NOT CHECK THIS OPTION**