Assign Delegates

A delegate is a person authorized to act on your behalf. Request and Expense share delegates, so assigning a delegate to one assigns it to the other.

1. Select Request Delegates or Expense Delegates from Profile Settings

2. The “Delegates” tab is persons assigned as delegates to your account

3. Click “Add” then search for and select the desired delegate’s name

4. Assign the applicable permissions and click “Save”
Permissions

The following permissions are for travel coordination:

1. Can Prepare – The delegate may prepare Requests and Reports on your behalf. You are still required to submit the Report.
2. Can Book Travel – The delegate may arrange Travel on your behalf. Delegates receive the same booking email notifications regardless of who completes the booking.
3. Can Submit Reports – Delegates cannot submit a Report on your behalf. However, the “Can Submit Reports” permission allows the delegate to click “Submit Report” to view and resolve any audit flags before you submit.
4. Can Submit Requests – Delegates cannot submit and approve the same Request.
5. Can View Receipts [and available expenses] – Should check by default when Can Prepare is selected.
6. Receives Emails – The delegate receives system emails sent to you.

The last four permissions are for approval delegation:

1. Can Approve [indefinitely on the approver’s behalf] – Use this option to set a backup that can always approve on your behalf (no time limit). Before giving an individual this type of delegate access please ensure they have the authority to approve on your behalf.
2. Can Approve Temporary (a date range is required) – Use this option to set a date range for someone to approve on your behalf.
3. Can Preview for Approver – Use this option to set a delegate to preview the Report/Request before you. This delegate cannot approve the Report/Request. Instead, the delegate’s task is to ensure that the Report/Request is ready for you to review and approve. With this option, you can wait until the preview delegate has selected Notify Approver (which generates an email notification to the approver), or you can approve the Report/Request without this delegate’s review.
4. Receives Approval Emails – Delegate is copied on approval notification emails.