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).

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 (Figure 2).

Figure 2

- Enter the last name or email of the person you want to assign as your delegate.
- Select the person when they appear in the list.

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2. **Assign Delegate Permissions**

Click the checkboxes to assign the delegate permission to perform tasks on your behalf.

- Figure 3 shows the available options if you have the capability to be an approver.

  ![Figure 3](image1.png)

  **Figure 3**

- Figure 4 shows the available options if you do **NOT** have the capability to be an approver.

  ![Figure 4](image2.png)

  **Figure 4**

- **Can Prepare** - allow the delegate to prepare your expense reports.
- **Can View Receipts** - allow the delegate to view and attach your receipts.
- **Receives Emails** - allow the delegate to be copied on email notifications you receive from the system.
- **Can Approve** – This permission is non-compliant. If needed, you can use the ‘Can Approve Temporary’ function.”
- **Can Approve Temporary** – allow someone to approve on your behalf “allows someone to approve on your behalf if you are not able to approve. Some examples: maternity leave, sabbatical, medical leave.”
- **Can Preview for Approver** – allow the delegate to preview the expense reports in your approval queue. They will not have access to approve the reports.
- **Receives Approval Emails** - allow the delegate to be copied on email notifications you receive from the system.
- **When finished, click Save.**

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