

Assign a Delegate

You may assign a delegate in the travel and expense system, another user who is authorized to complete work on your behalf. However, first be sure to confirm with your department that this is allowed. In the system you can assign a delegate permission to:

- Prepare your expense reports.
- View your receipts.
- Receive copies of your email notifications from the system.
- Preview expense reports pending your approval on your behalf if you are both approvers.
- Approve expense reports on your behalf if you are both approvers.

1. Add Your Delegates

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

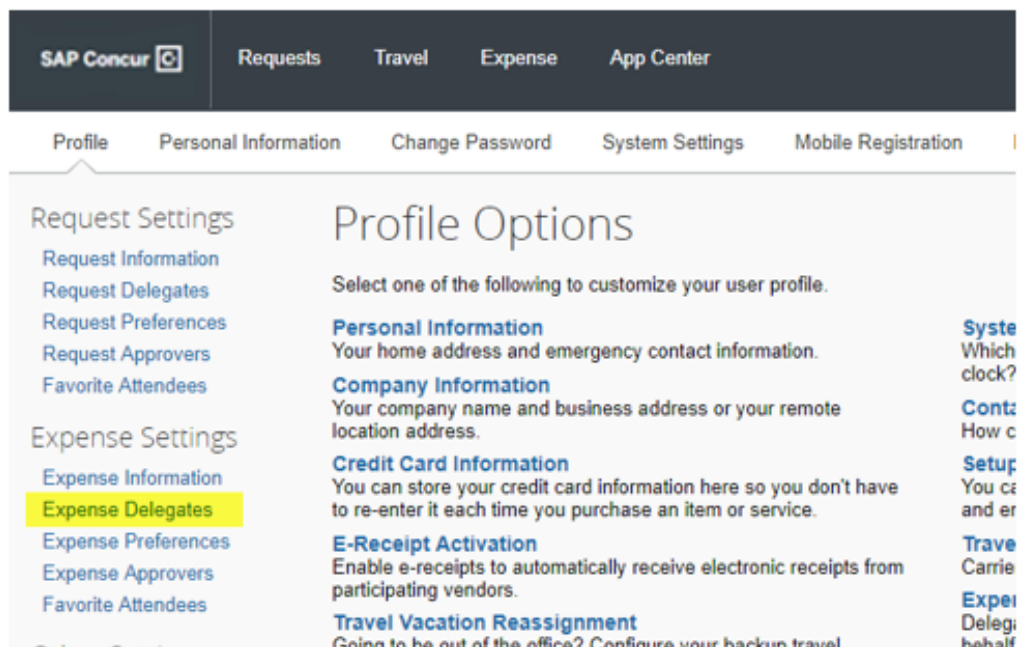


Figure 1

- *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).

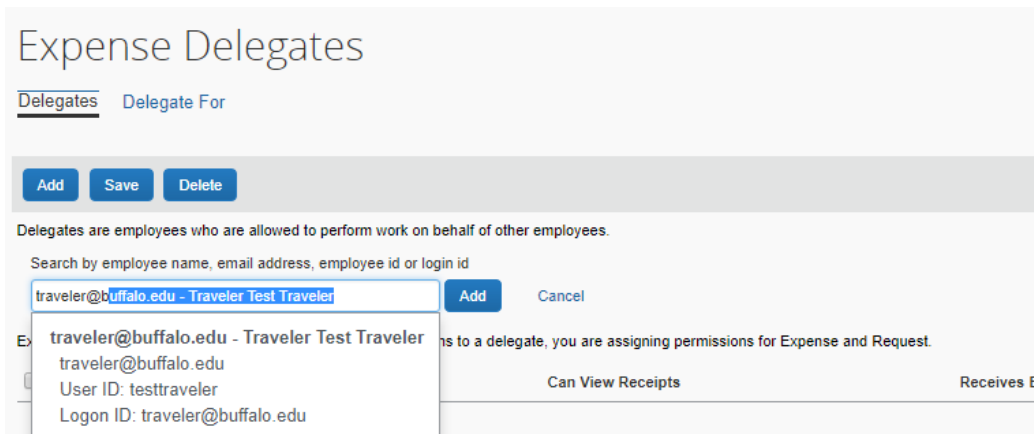


Figure 2

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

2. Assign a Preparer Delegate

Assign a preparer delegate permission to prepare expense reports on your behalf. Click the checkboxes to assign their permissions (Figure 3).

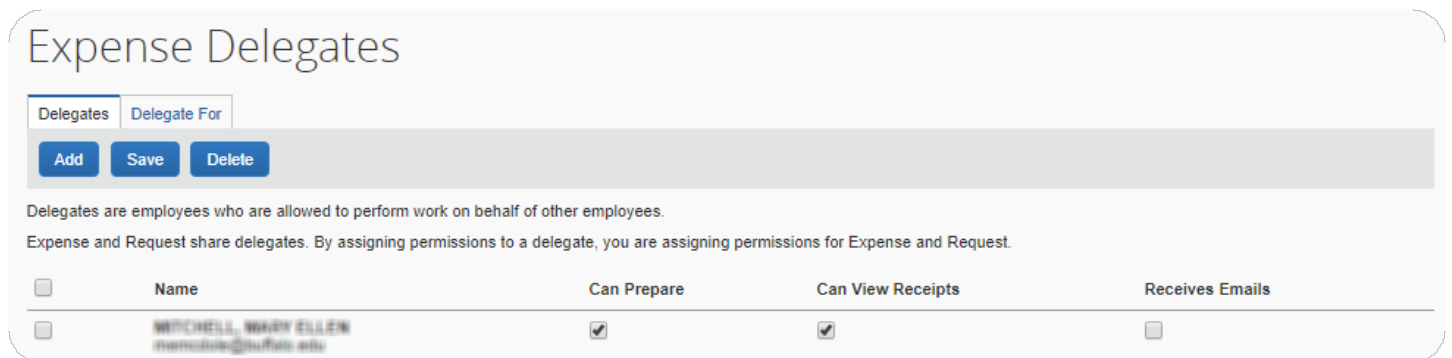


Figure 3

- Click *Can Prepare* to allow the delegate to prepare your expense reports.
- Click *Can View Receipts* to allow the delegate to view and attach your receipts.
- Click *Receives Emails* to allow the delegate to be copied on email notifications you receive from the system.
- When finished, click *Save*.

3. Assign an Approval Delegate

Assign an approval delegate permission to preview or approve expense reports pending your approval on your behalf. You and the delegate must both be approvers. Note that assigning an approval delegate permission to approve reports on your behalf can only occur while you are on a leave of absence. Click the checkboxes to assign their permissions (Figure 4).

For travel and expense system support, email ubs-travel-expense-support@buffalo.edu

Expense Delegates

Delegates Delegate For

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request.

<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"/>	MITCHELL, WENDY ELLEN wendy@buffalo.edu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="text" value=""/> <input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 4

- Click *Can Approve* to allow the delegate to approve expense reports on your behalf. This can only be assigned while you are on a leave of absence. Instead, use the option *Can Approve Temporary* and set the timeframe for your leave of absence during which the delegate can approve reports on your behalf.
- Click *Can Approve Temporary* to allow the delegate to approve expense reports on your behalf during a specified timeframe. This can only be assigned while you are on a leave of absence. Use the calendar to set the dates for when they can approve on your behalf.
- Click *Can Preview for Approver* to allow the delegate to preview the expense reports in your approval queue. They can review reports pending your approval and mark them ready for your review, but they cannot approve the reports.
- Click *Receives Approval Emails* to allow the delegate to be copied on approval email notifications you receive from the system.
- When finished, click *Save*.