

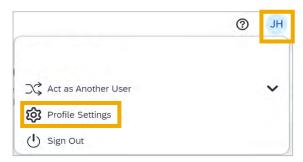
FINANCE AND OPERATIONS

Travel Services

A Personal Delegate can assist in preparing Requests and Expense Reports on your behalf. Additional permissions may include the ability to Submit Requests and/or receive copies of emails.

Adding a Personal Delegate

- 1. Click the **Profile** link.
- 2. Click the **Profile Settings** link.



Result: You will be directed to the Profile Options page.

3. Click the **Expense Delegates** link.



Note: Delegates may also be assigned through the Request Delegates link. Regardless of the link chosen, Delegates have access to both systems.

4. Click the **Add** button, then search for the employee you want to assign as a Delegate.

=xh	ense	Det	ega	les		
Delegates	Delegate For					
Add	Save D	elete				
elegates ar	e employees wh	no are allowe	d to perform	work on be	half of o	ther employee
Search by	employee name	e, email addre	ess, employe	e id or logi	nid	
					Add	Cancel

Assigning a Personal Delegate

- 5. Click on the employee you wish to add as a Delegate.
- 6. Select the tasks you want the Delegate to perform on your behalf.

٥	Name	Can Prepare	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
2	Alston, Cortney cortney.alston@unc.edu	2	Ø		2	2	0 🛅	8.1	۵
٥	Brown, Collette collette brown(Bunc edu	5	2	5	8	5	0 🔳	0	۵

Note: Personal Delegates can submit Travel Requests but cannot submit Expense Reports on a traveler's behalf.

7. Click the **Save** button.

Exp	ense Delegates	
Delegates	Delegate For	
Add	Save Delete	
Delegates ar	employees who are allowed to perform work on behalf of other emplo	yees.

Deleting a Delegate

To delete a Delegate follow steps 1 to 3 from the *Adding a Personal Delegate* section, then complete the following steps:

1. Check the box beside the employee you want to remove as a Delegate.

E)	pense D	eleg	ates						
Dela	cales Delegate Con								
A	dd Save Delet	3							
Deleg	ates are employees who an	anowed to	perform work on be	shalt of other empl	loyees.				
You IT	wy assign a temporary appr	over for a m	aximum of 120 day	5.					
Exper	se and Request share dele	gates. By as	signing permissions	to a delegate, you	are assigning pe	emissions for El	pense and Request.		
D.	Name	Can Prepare	Can Submit Requests	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approva Emails
	Alston, Cortney cortney.alston@unc.edu	2	5	53	8	12			
E3	Brown, Collette	23	5	5	5	53			C .

- 2. Click the **Delete** button.
- 3. Click the **OK** button on the pop-up message that will appear.

Result: The system will delete the Delegate you selected.