Assigning an Approval Delegate
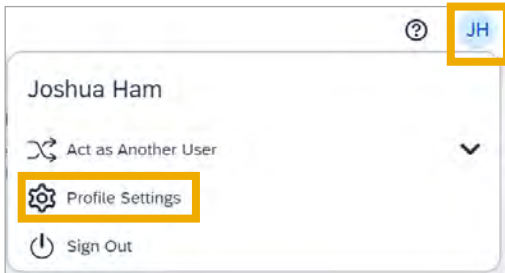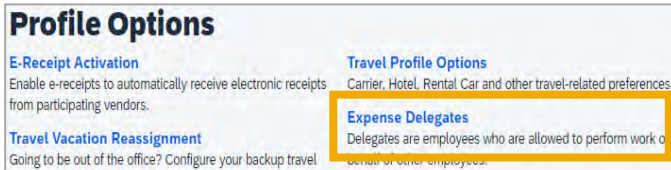
An Approval Delegate can assist in approving Requests and Expense Reports on your behalf. Follow these steps to assign an Approval Delegate:

1. Click the **Profile** link.

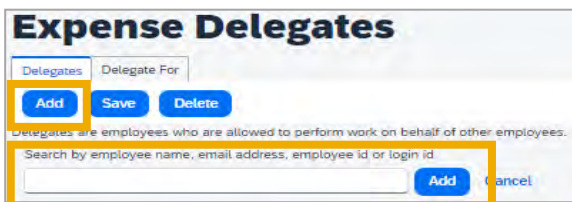2. Click the **Profile Settings** link.

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

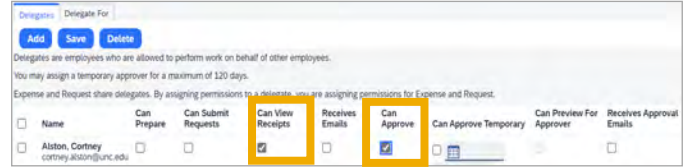3. Click the **Expense Delegates** link.

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.

5. Click on the employee you wish to add as an Approval Delegate.

6. Check the **Can Approve** box option.

Note: Selecting **Can Approve** will also automatically check the **Can View Receipts** option as well. Approval Delegates must be able to view receipts to act as an Approval Delegate. Alternatively, Delegates may be setup to Approve Temporary for a specific time frame or they may be setup to Preview for an Approver. Approval Delegates additionally have the option to Receive Approval Emails.

7. Click the **Save** button.

Deleting a Delegate

You can delete or edit a Delegate's approval options at any time. Follow these steps to delete a delegate:

1. Complete steps 1 to 3 from the Assigning an Approval Delegate section.

2. Mark the checkbox beside the name of the Delegate you want to delete.

3. Click the **Delete** button.
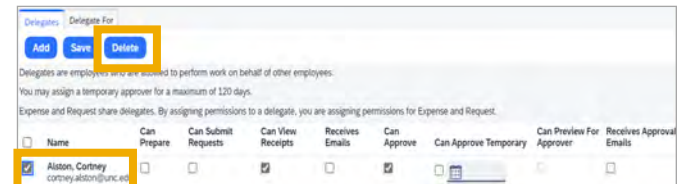
Result: The system will generate a popup message to confirm your request.

4. Click the **OK** button.