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.
3. Click the Expense Delegates link.

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

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. Delegates may also 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 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.