

## TRAVEL APPLICATION

### General

### HELPFUL HINTS

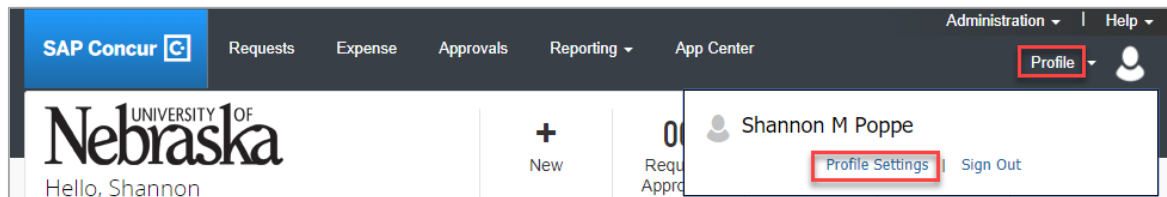
- Only the traveler can submit a travel request or an expense report.
- Delegate is a role similar to a travel coordinator.
- Within profile settings, an individual can add a delegate from either request delegates or expense delegates. Although titled differently, both function the same to add a delegate.
- If an approver only wants to assign a delegate to prepare requests and expense on their behalf, but not to approve on anything on their behalf, the approver should only select the first three checkbox options.

<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"/>	Rutt, Aaron arutt@nebraska.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 06/18/2018 <input type="checkbox"/> 06/22/2018	<input type="checkbox"/>	<input type="checkbox"/>

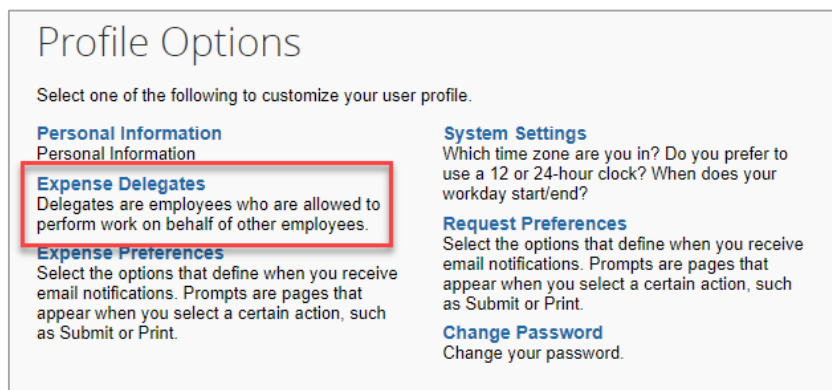
### PROCEDURE

A delegate is a user who is granted permission to act on behalf of a traveler to perform tasks such as creating and entering requests and expense reports. Only the traveler can submit the request and expense for approval.

1. To assign a delegate, click profile, then profile settings.



2. Under the Profile Options, click on Expense Delegates.



## ASSIGN A DELEGATE

- Click on **Add**.

The screenshot shows the 'Expense Delegates' interface. At the top, there are tabs for 'Delegates' and 'Delegate For'. Below the tabs are three buttons: 'Add', 'Save', and 'Delete'. The 'Add' button is highlighted with a red box. Below the buttons, there is a descriptive text: '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.' Below this text is a table with columns for various permissions: Name, Can Prepare, Can View Receipts, Receives Emails, Can Approve, Can Approve Temporary, Can Preview For Approver, and Receives Approval Emails. The table currently shows 'No records found.'

- Enter all or part of the individual's name.

The screenshot shows the 'Expense Delegates' interface. Below the 'Add', 'Save', and 'Delete' buttons, there is a search section. It includes the text: 'Delegates are employees who are allowed to perform work on behalf of other employees. Search by employee name, email address, employee id or login id'. Below this text is a search input field with a red border and an 'Add' button to its right, and a 'Cancel' button further to the right.

- Select the user from the list, then checkmark the applicable checkbox(s) for roles.

The screenshot shows the 'Expense Delegates' interface. Below the search section, there is a table with columns for various permissions: Name, Can Prepare, Can View Receipts, Receives Emails, Can Approve, Can Approve Temporary, Can Preview For Approver, and Receives Approval Emails. The table has one row for 'Davids, Julie' with the email address 'jdavids@nebraska.edu'. The checkboxes for 'Can Prepare', 'Can View Receipts', 'Receives Emails', 'Can Approve', 'Can Approve Temporary', 'Can Preview For Approver', and 'Receives Approval Emails' are all checked. The entire table area is highlighted with a red border.

### Permissions:

For a delegate to act as a traveler (create a travel request or an expense report):

- Can prepare
- Can view receipts
- Receives emails

For a supervisor approver or financial approver who is assigning a user to temporarily approve on their behalf:

- Can approve: If an employee is currently a travel approver for assigned employees, this enables the delegate to approve travel on their behalf.
- Can approve temporary
- Can preview for approver
- Receives approval emails

- Click on **Save**.

- The user will now be able to act as a delegate and will see your name listed on their *Delegate For* tab.