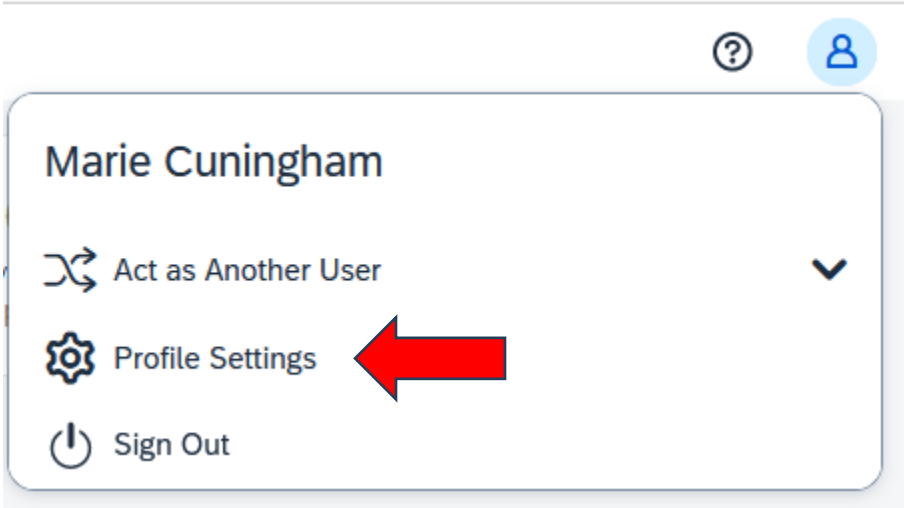
What's the difference between a Travel Arranger and an Expense Delegate?

Travel Arranger – This individual can make travel reservations for another employee or a guest traveler.

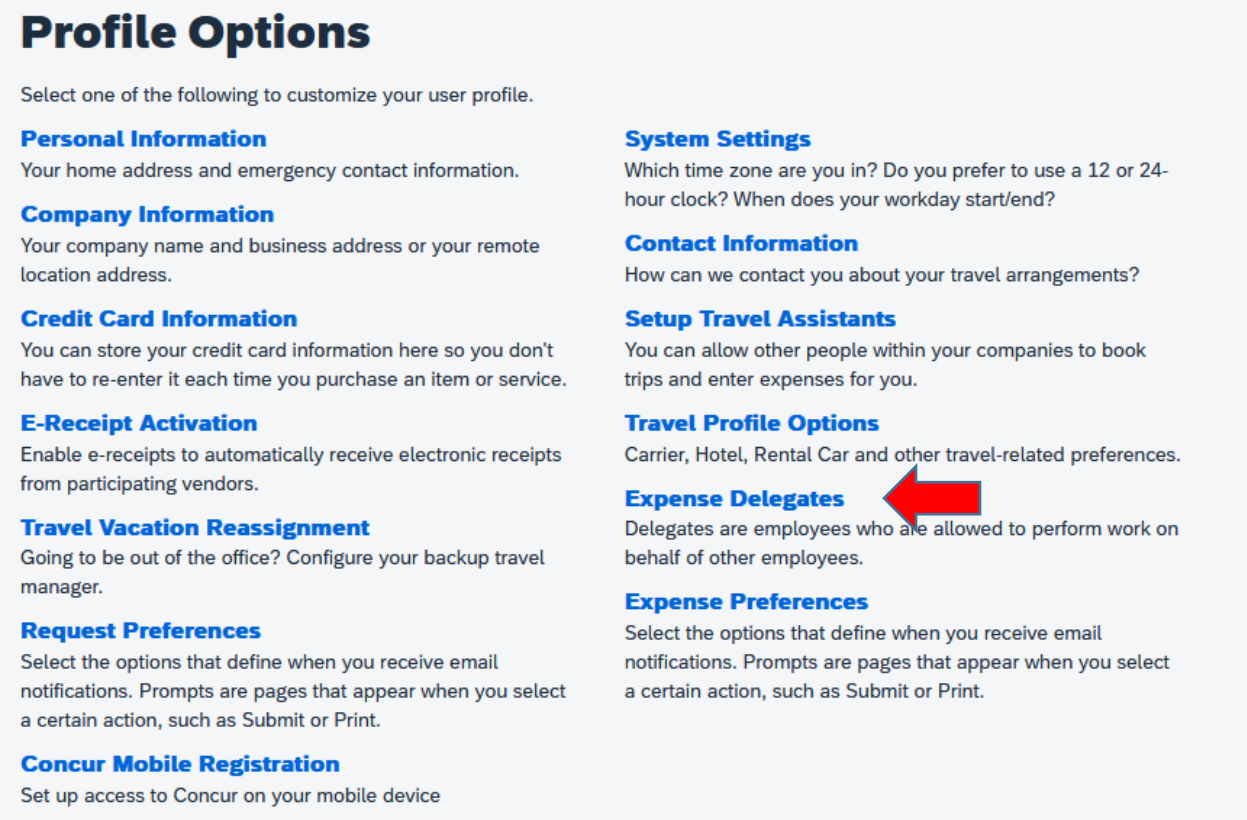
Request/Expense Delegate – This individual can create preapproval Requests and Expense Reports on behalf of another employee.

How to Assign a Request or Expense Delegate:

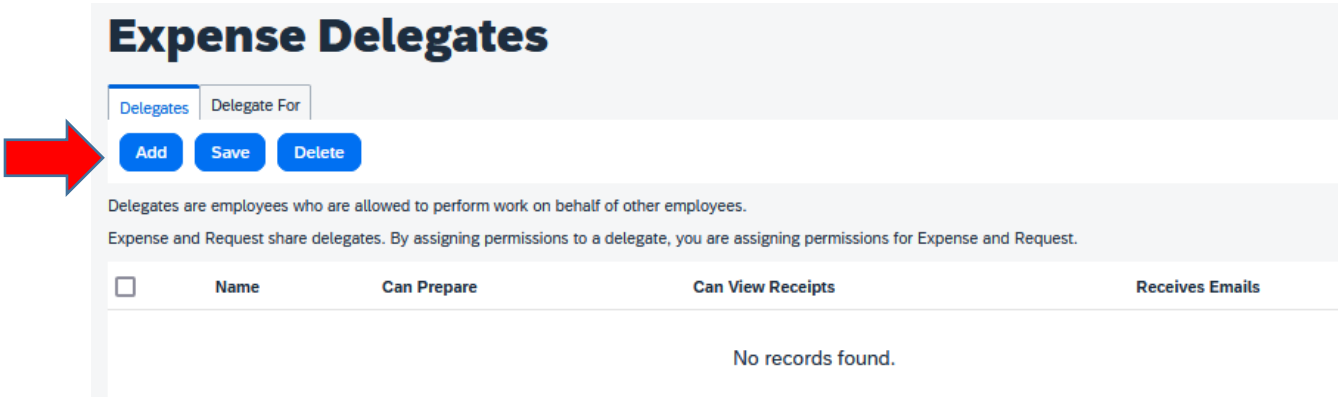
Go to your Profile Settings.



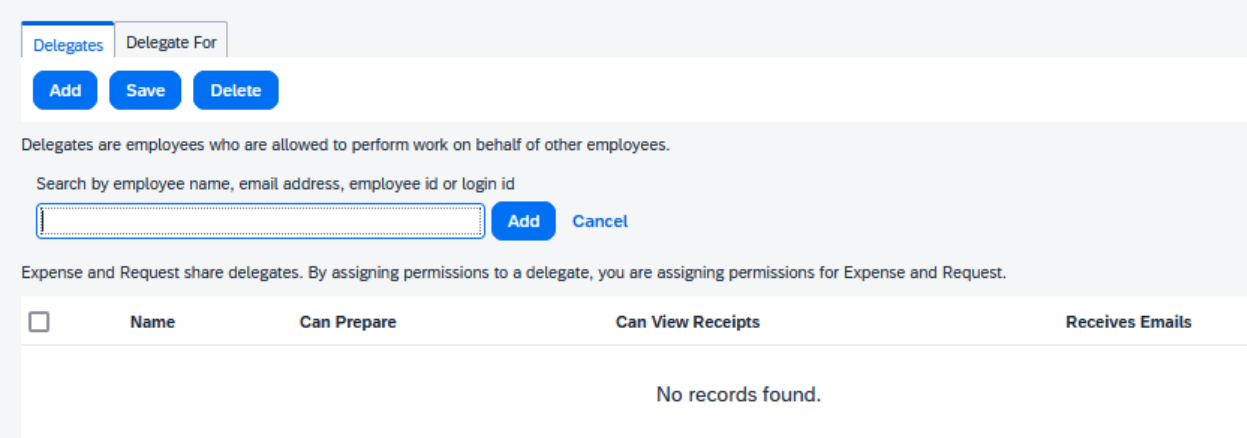
Select “Expense Delegates.”



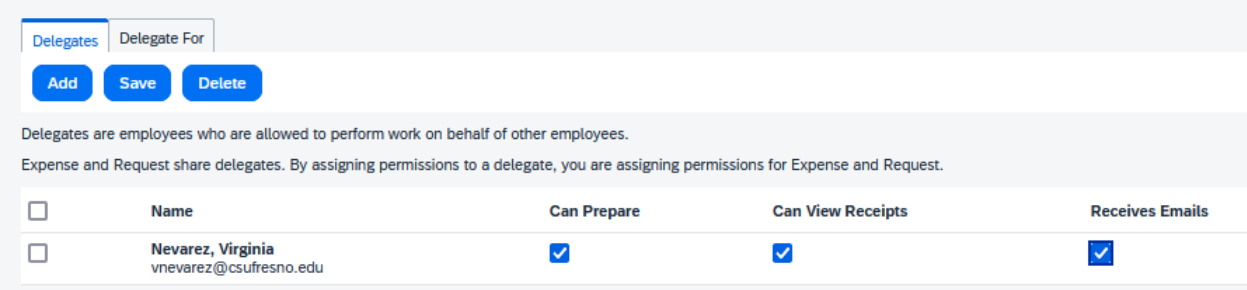
Click the Add button



Search for the name of the employee you wish to be your delegate.

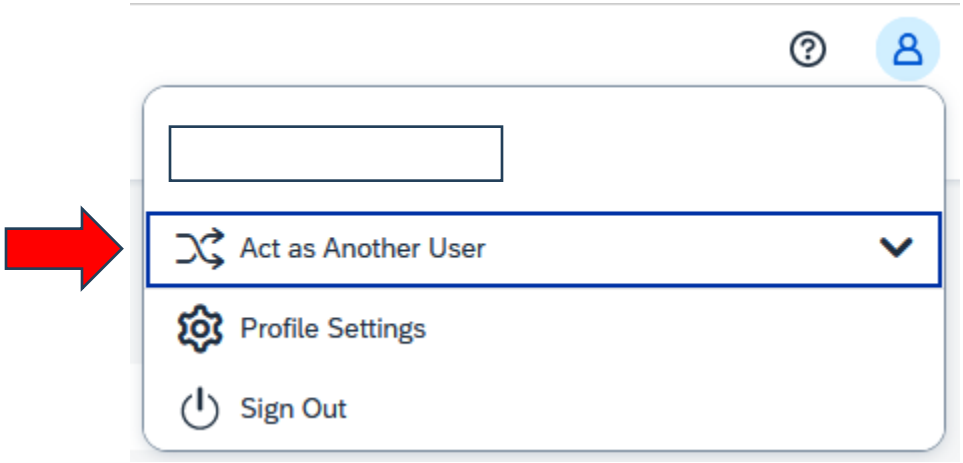


Select the permissions you want your delegate to have, and then click the Save button.

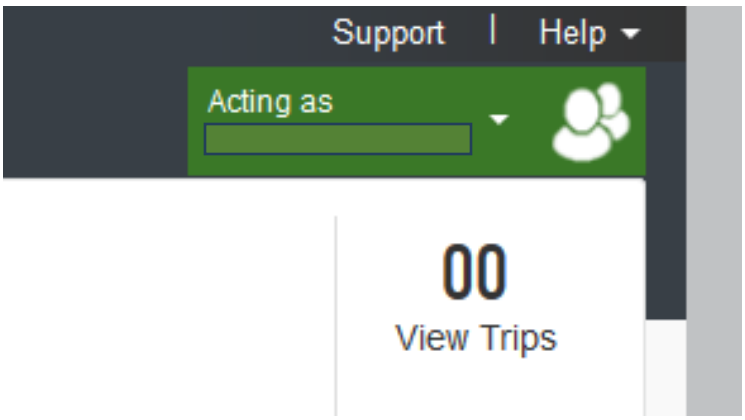


Once the employee is selected and the permissions granted, the delegate will be able to complete preapproval Requests and Expense reports.

The delegate can now go their Profile Settings and click “Act on Behalf of Another User.” Type the first few letters of the traveler’s last name and select. Click the Start Session button.

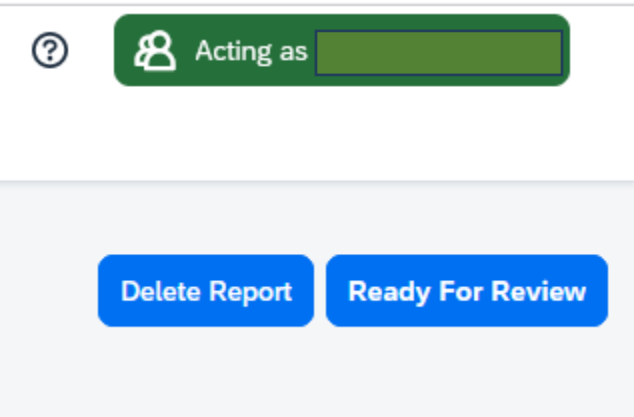
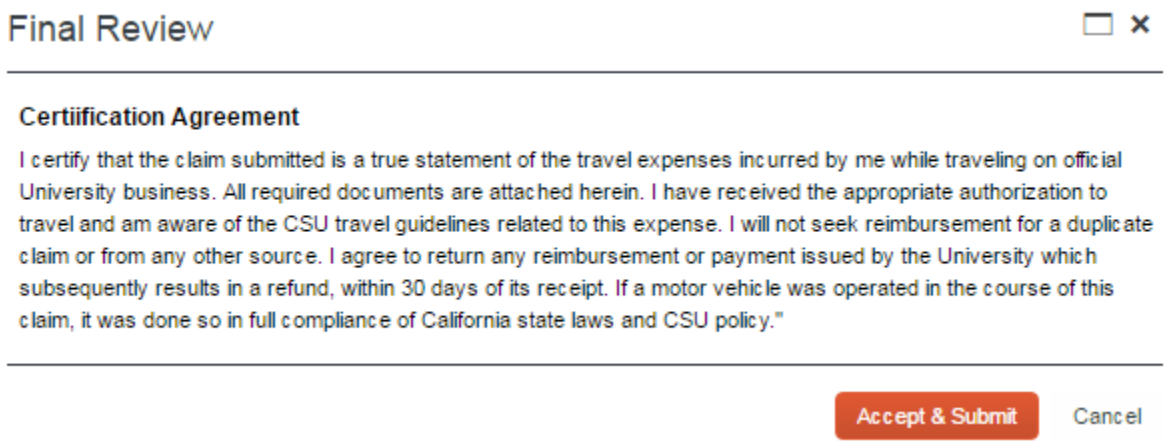


The Delegate will now see that they are acting on behalf of the traveler, and can create a Travel Request or Expense Report on behalf of the traveler.



IMPORTANT:

Delegates can create preapproval Requests and Expense reports for travelers, but they **cannot** “Submit” the report for the traveler. When the delegate has completed a report, they must click “Ready for Review.”



The traveler will receive a notice that their preapproval Request or Expense report is ready for review. Once the traveler has reviewed the report, they must “Submit” the report themselves due to the certification that they must accept.