Delegate Role

*User Guide for the E-Travel System*

If you are a delegate for a traveller who needs to submit a request or an expense report, you will find in this guide all the information that you need in order to act as a delegate. You will also need to review the User Guide – Traveller where you will find the information relevant to enter the request or submit an expense report.
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HOW TO ACT AS A DELEGATE
If you are a delegate acting on behalf of another (delegator), you can:

- Make changes that affect only the delegator and do not change your personal information.
- Access only what the delegator has assigned to you.
  - Prepare requests.
  - Prepare expenses reports.
  - Attach receipts.
  - Receive email notification when a document status changed.
  - Approve request and/or expenses reports (if you are a delegate for an approver).

To work as a delegate:

- Open a Concur session using your own ID and password.
- Click Profile.
- In the Acting as other user field, start typing a name and then you will be able to select the name of the delegator on whose behalf you are working.
- Click Start Session.

You are now officially working on behalf of that person.

**NOTE:** If you can’t see this when you click on Profile, the traveller did not set you up as a delegate. The traveller must set you up as a delegate in order for you to be able to act as a delegate for him.

**NOTE:** The Profile drop-down now reads “Acting as” and shows the name you just selected.
To return to your own profile:

- Click **Acting as**.
- Click **Done acting for others**.

When the screen refreshes, you will be back to your own account and the “Acting as” drop-down will change back to “Profile.”
HOW TO CREATE AN EXPENSE REPORT OR A REQUEST AS A DELEGATE

Proceed by working on the expense report as usual (see How to Create an Expense Report — Detailed). Once you have completed all the steps required to create an expense report, you will have the option to Notify the employee. As a delegate, you do not have the ability to submit a report or a request for a traveller. The traveller must be the one that submit the report and electronically agree that all the expenses are exacts and comply with the University policy.

MISSING RECEIPTS AFFIDAVIT: A delegate cannot create a missing receipt affidavit. Notify the individual that their expense report is ready except for one missing receipt. If necessary, provide them with procedures on submitting the missing receipt affidavit (See How to Attach a Missing Receipt Affidavit in the User Guide - Traveller).

To return to your own profile:

- Click Acting as.
- Click Done acting for others.

When the screen refreshes, you will be back to your own account and the “Acting as” drop-down will change back to “Profile.”