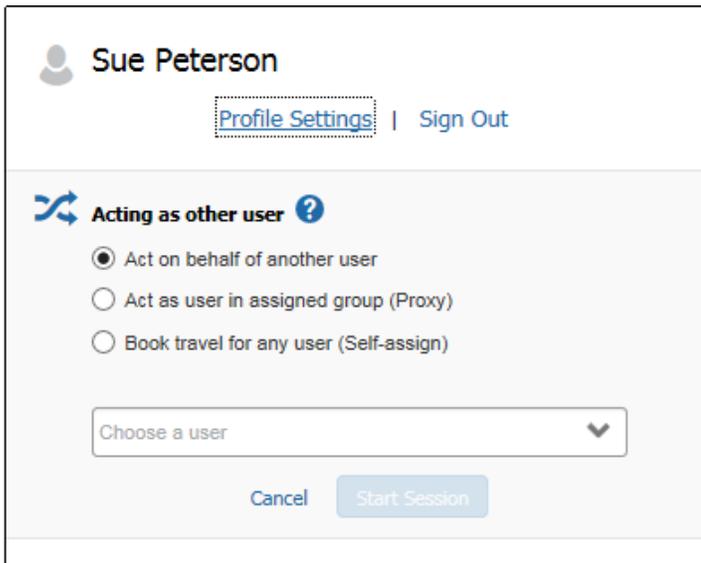


Acting as a Delegate

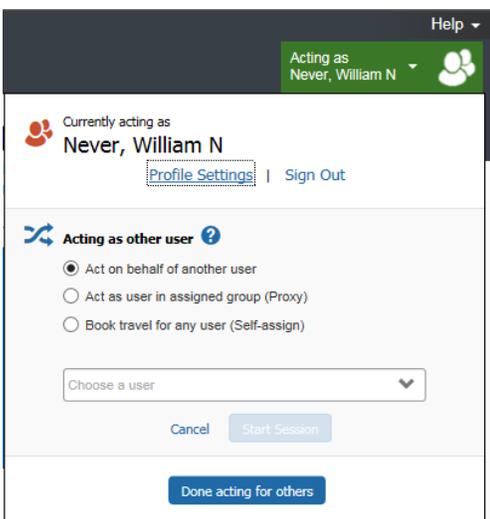
If you have been assigned to work as a delegate, your delegator will define which tasks you can complete, such as preparing reports, submitting reports, etc.

To work as a delegate:

1. Click **Profile > Act on behalf of another user**.
2. Select the appropriate user's name.
3. Click **Start Session**.
NOTE: Notice that the **Profile** menu now displays **Acting as** and shows the name you just selected.
4. You are now officially working on behalf of that person. Complete the normal processes of creating reports, printing, etc.
 - To select a different user, follow the same steps but select a different name.
 - To return to your own tasks, click **Acting as**, and then click **Done acting for others**.
NOTE: Notice that the **Profile** menu now appears.



The screenshot shows a user profile for Sue Peterson. Below the profile name are links for 'Profile Settings' and 'Sign Out'. The main section is titled 'Acting as other user' with a question mark icon. It contains three radio button options: 'Act on behalf of another user' (selected), 'Act as user in assigned group (Proxy)', and 'Book travel for any user (Self-assign)'. Below these options is a dropdown menu labeled 'Choose a user'. At the bottom are 'Cancel' and 'Start Session' buttons.



This screenshot shows the same 'Acting as other user' dialog box, but now the user 'Never, William N' is selected. The 'Acting as' status is shown in a green bar at the top right. The 'Profile Settings' and 'Sign Out' links are still present. The 'Acting as other user' section is the same, but now a 'Done acting for others' button is visible at the bottom of the dialog.

Reviewing and Approving an Expense Report

To approve a report "as is":

1. On the home page, in the **Required Approvals** section of **My Tasks**, click **Expense Reports**. The **Reports Pending your Approval** page lists the awaiting reports. Select the report you want to open.
2. Review the report details, and then click **Approve**.

Sending Back an Expense Report

To return the entire expense report to the employee for correction:

1. On the home page, in the **Required Approvals** section of **My Tasks**, click **Expense Reports**. The **Reports Pending your Approval** page lists the awaiting reports. Select the report you want to open.
2. Click **Send Back to Employee**. The **Send Back Report** window appears.
3. Enter a **Comment** for the employee, explaining why you are returning the report.
4. Click **OK**.

Adding an Additional Review Step

Depending on your company's configuration, you might also see an **Approve & Forward** button on an expense report. This allows you to send the report to another approver.

To approve and forward a report:

1. On the home page, in the **Required Approvals** section of **My Tasks**, click **Expense Reports**. The **Reports Pending your Approval** page lists the awaiting reports. Select the report you want to open.
2. Review the report, and then click **Approve & Forward**. Enter the **User-Added Approver**, and add a comment, as needed.
3. Click **Approve & Forward** to approve the expense report and send to the next approver.

Global Tech Sales Training (Never, William) Send Back to Employee Approve Approve & Forward

Summary Details Receipts Print / Email Hide Exceptions

Exceptions

Expense	Date	Amount	Exception
N/A			La cantidad total es de 10.000. Se ha seleccionado para revision de auditoria.
Hotel	2015-02-20	\$247.94	This itemized entry has sub-entries with one or more exceptions.
Hotel	2015-02-20	\$57.00	This expense entry may be a duplicate of the following expense.

Expenses

Transaction D...	Expense Type	Vendor Name	Business Purp...	City	Payment Type	Amount	Adjusted Clai...
2015-04-09	Airfare	U.S. AIRWAYS	conference	Seattle, Washa...	American Express	\$516.78	\$516.78
2015-04-03	Hotel	Courtyards		Vienna, Virginia	Company Paid	\$099.00	
2015-02-20	Hotel	Extended Stay	Sales meeting	Memphis, Tenn...	Travel Payment T...	\$247.94	
2015-02-17	Business Meal (attendees)	ABC Dining	Conference meal	Memphis, Tenn...	Out of Pocket	\$40.00	\$40.00
2015-02-17	Parking			Memphis, Tenn...	Out of Pocket	\$15.00	\$15.00

Summary

Report Summary

Report Total	Amount Due Com...	Amount Due Com...	Amount Due Emp...
	\$0.00	\$766.72	\$55.00