The **Delegate** role in ERS grants an individual permission to act on behalf of another Expense or Request user in preparing, submitting, approving requests or claims.

By assigning permissions to a delegate, you are granting them permission to submit travel and expense claims as well as cash and research participant advances on your behalf. In some cases, you may be able to set up as delegate approver as well.

You can set up your own delegate or if the individual is not comfortable using ERS they can contact [expenses@queensu.ca](mailto:expenses@queensu.ca) and request that a delegate be set up.

To set up a large number of delegate accounts at once please contact [expenses@queensu.ca](mailto:expenses@queensu.ca).

To have a delegate set up by Financial Services please have the individual(s) involved send an email to [expenses@queensu.ca](mailto:expenses@queensu.ca).

The email should contain similar wording to:

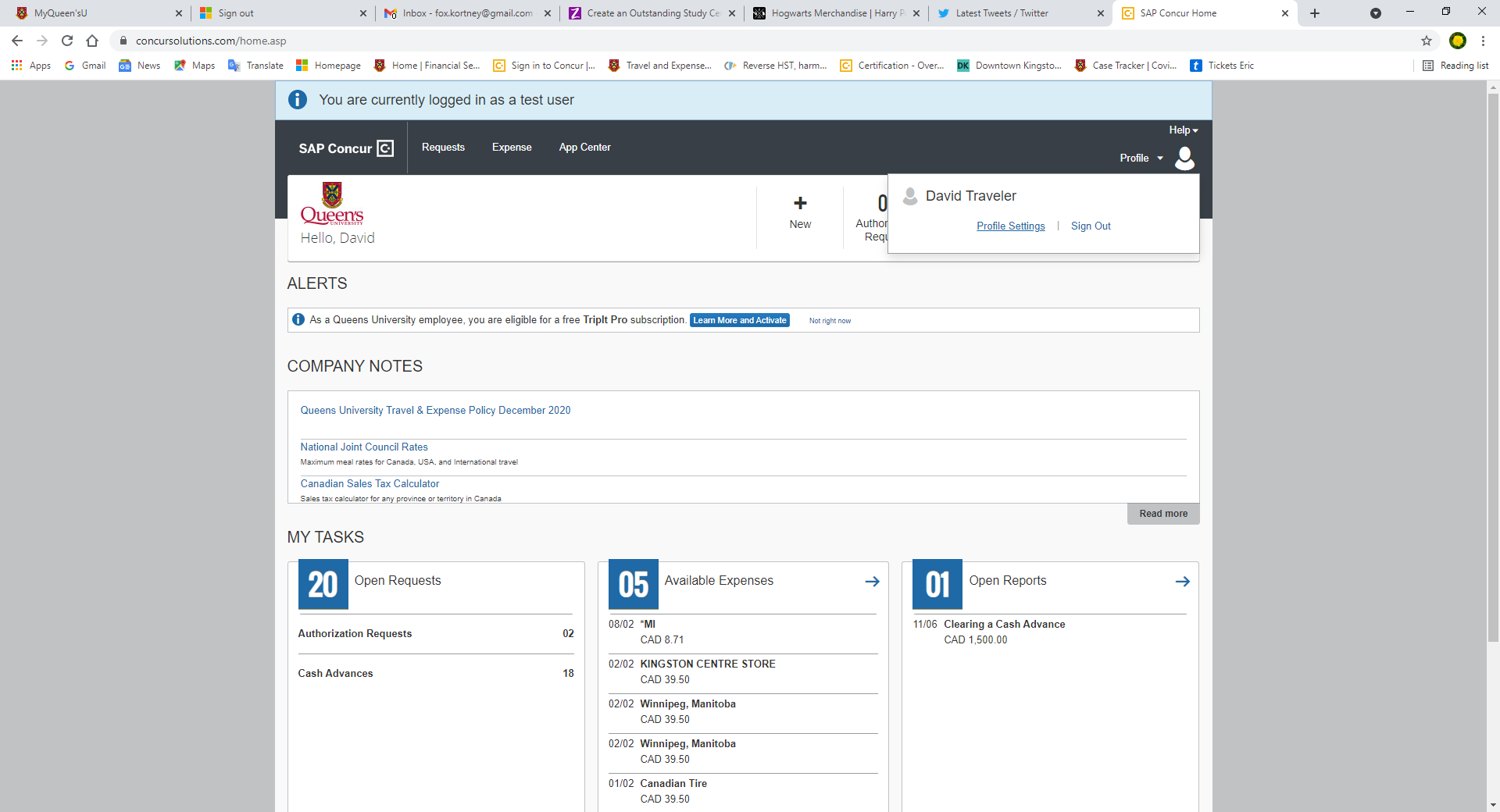
“I Matthew Approver give permission for Brian Processor to be set up as my delegate to submit claims/requests on my behalf.” Please include netid’s.

**Adding a Delegate**

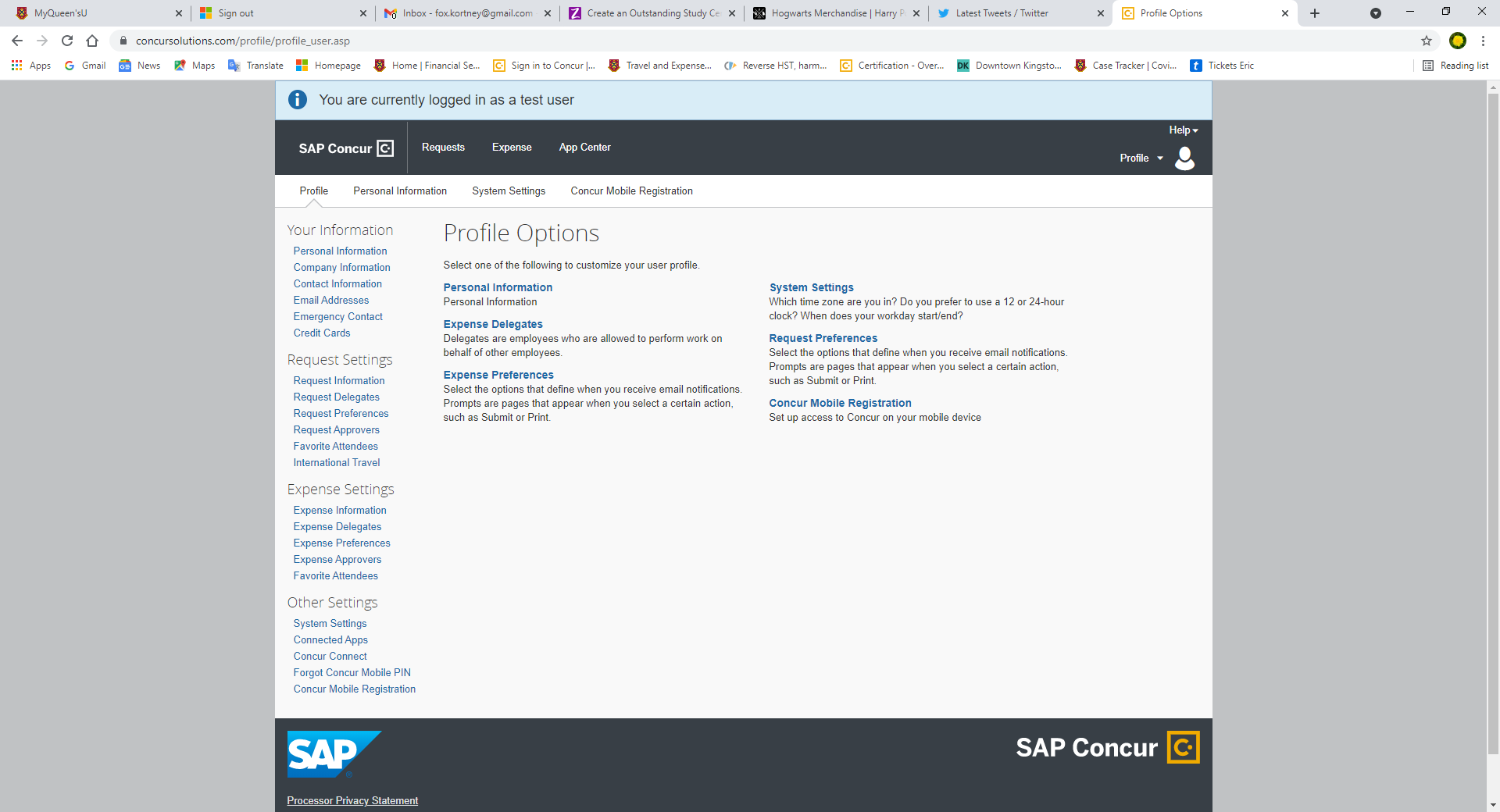
1. Log into ERS. For more detailed information on how to log into ERS please see the “ERS First Time Users Guide”.

[www.queensu.ca](http://www.queensu.ca) > Search and Sign In > MyQueen’sU – SOLUS, MyHR and More > Expense Reimbursement – ERS (Located under Finance Applications).

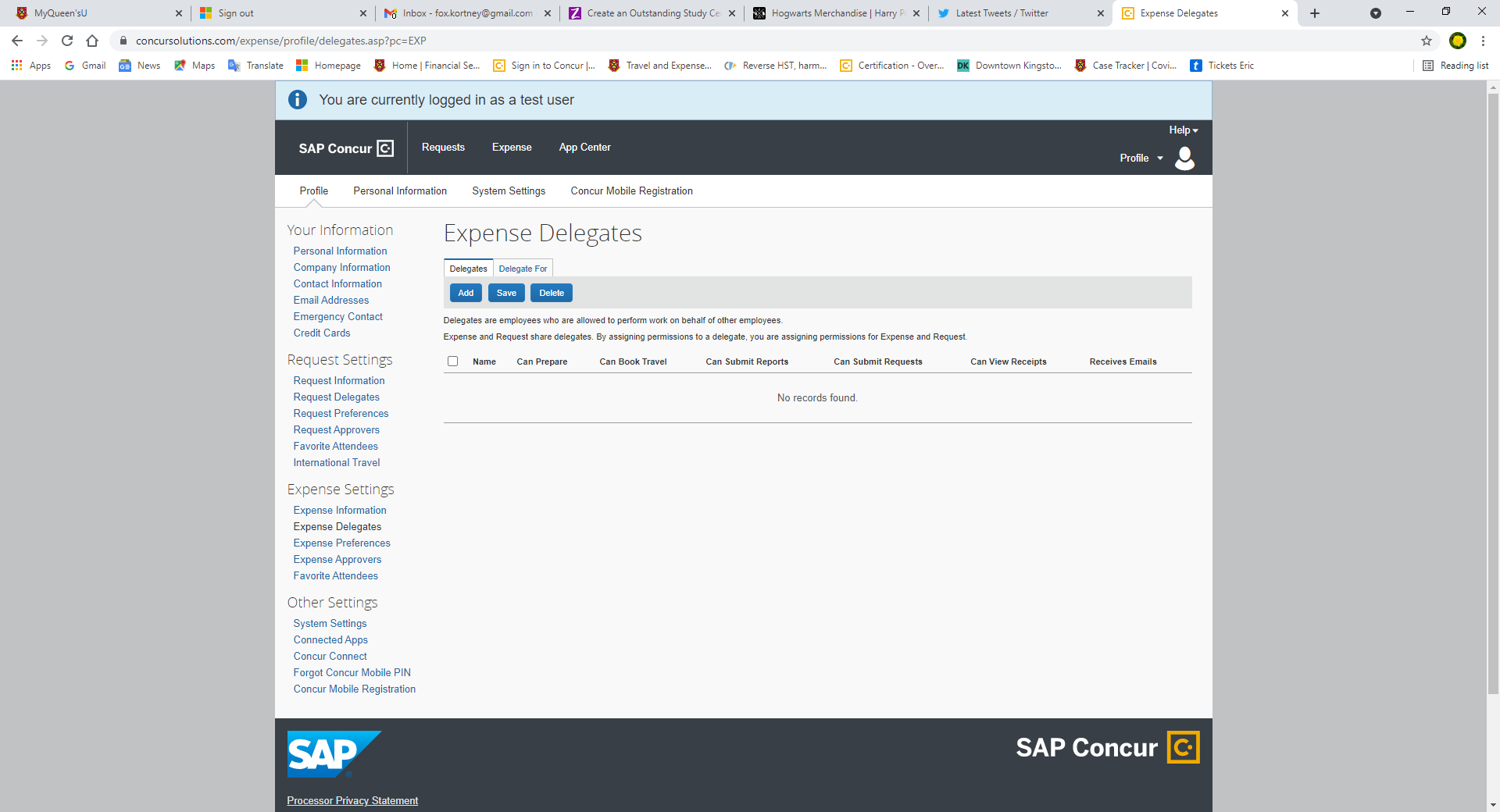
1. Go to your profile using the button in the top right corner. Then select the ‘Profile Settings’ link.



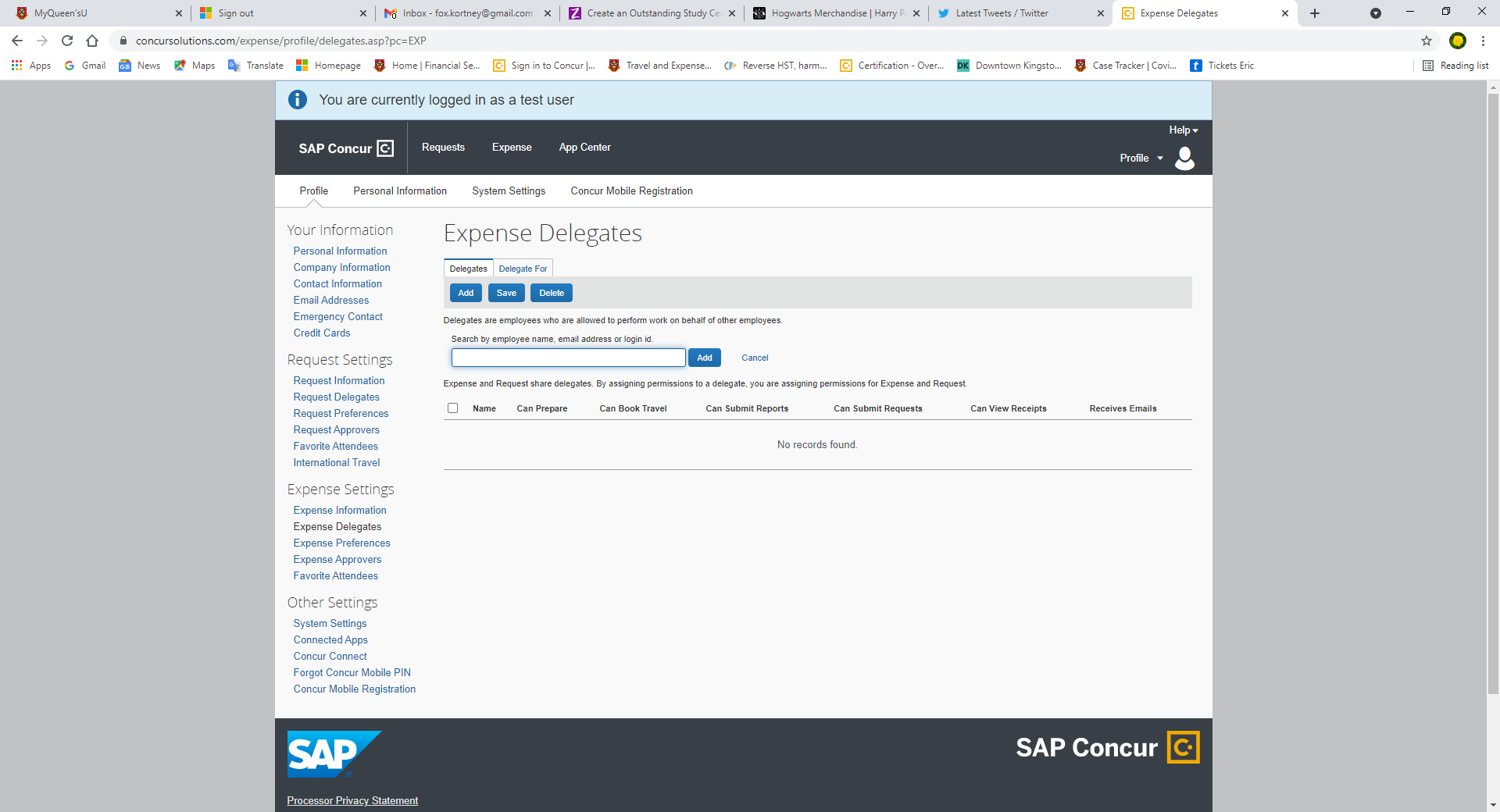
1. On the left side you will see a list of headings and subheadings. Under the ‘Expense Settings’ heading select the ‘Expense Delegates’.



1. The ‘Expense Delegates’ window will open, allowing you to select the ‘Add’ button.
   * Previously added delegates will be listed here.

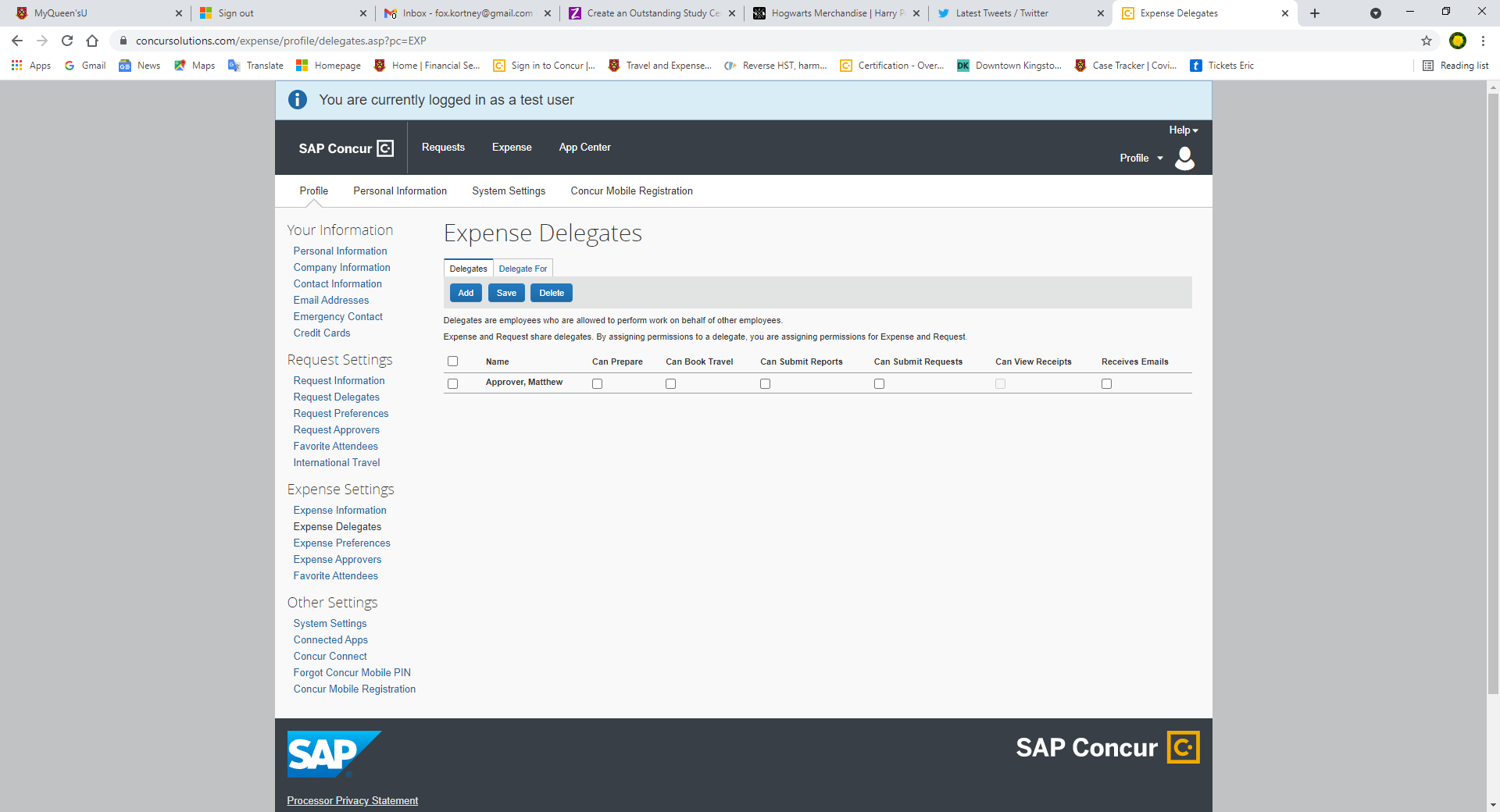


1. The ‘Search’ box will open. You will need to search by the **LAST** name of your desired delegate.
   * If the last name is hyphenated, you may have to try a combination of the names, with and without the hyphen or each name separately.
   * If you cannot find our approver, please contact Anthony Boese [ajb19@queensu.ca](mailto:ajb19@queensu.ca).



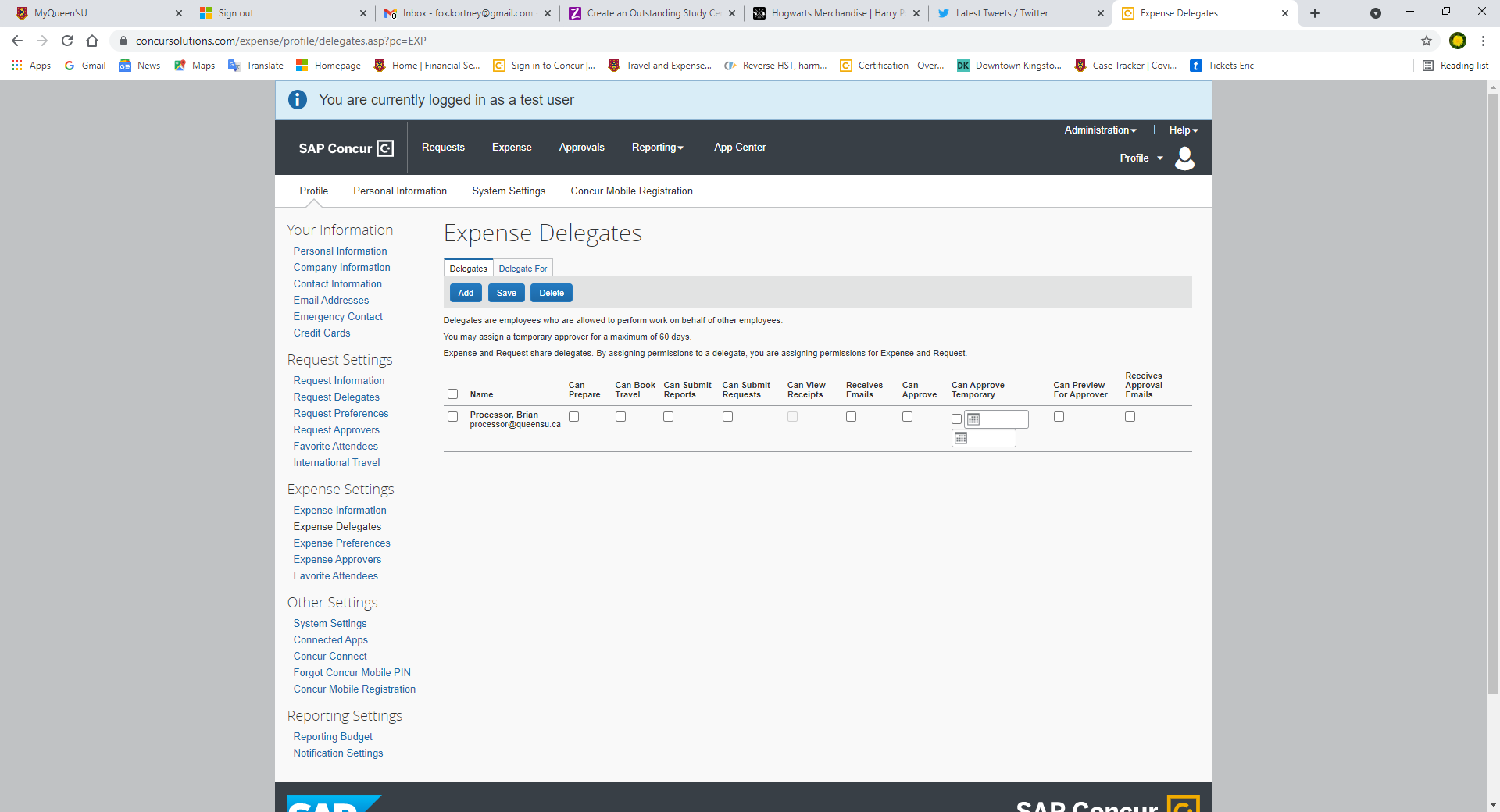
1. From the list generated, select the correct name. Once selected the individual will be added to the screen.
2. There will be 6 to 10 check boxes depending on your status in ERS. Select all the check boxes that apply.

*Delegate does not have Approver Status*



OR

*Delegate has Approver Status*



**NOTES:**

* We do not recommend allowing your delegate the ability to submit cash advance requests on your behalf. There have been cases where the same request was submitted multiple times. It is allowed, but we urge caution.
* The most common delegate is someone who can submit travel and expense claims. It is recommended that you select the ‘Receive Emails’ box so your delegate will receive emailed notifications in connection with the submitted requests/claims.
* You can assign a delegate approver for a period OR set it so that your delegate can Preview for Approval. For more information on the ‘Previewer’ role please see the “Previewer” document.

1. After you have selected all permissions/rights to your delegate, click on the ‘Save’ button.

**Deleting or Removing a Delegate**

If you have previously added delegates, they will be listed on the ‘Expenses Delegates’ page. If they should no longer have access to your ERS account, select the individual and then the delete button to remove their access.

It is recommended that delegates be removed and updated if you or they change departments. This will help reduce confusion and increase the security of your ERS account.

**Delegate For (Another User)**

If you want to see who you are a delegate for, select the ‘Delegate For’ tab.

If you have been set up as a delegate for others their names will be listed here. This is helpful when administrative and support positions change. A list can be generated so the individuals involved can ensure delegate access is removed or added as needed.

**NOTE:** If it is an extensive list, please contact [expenses@queensu.ca](mailto:expenses@queensu.ca) for options.

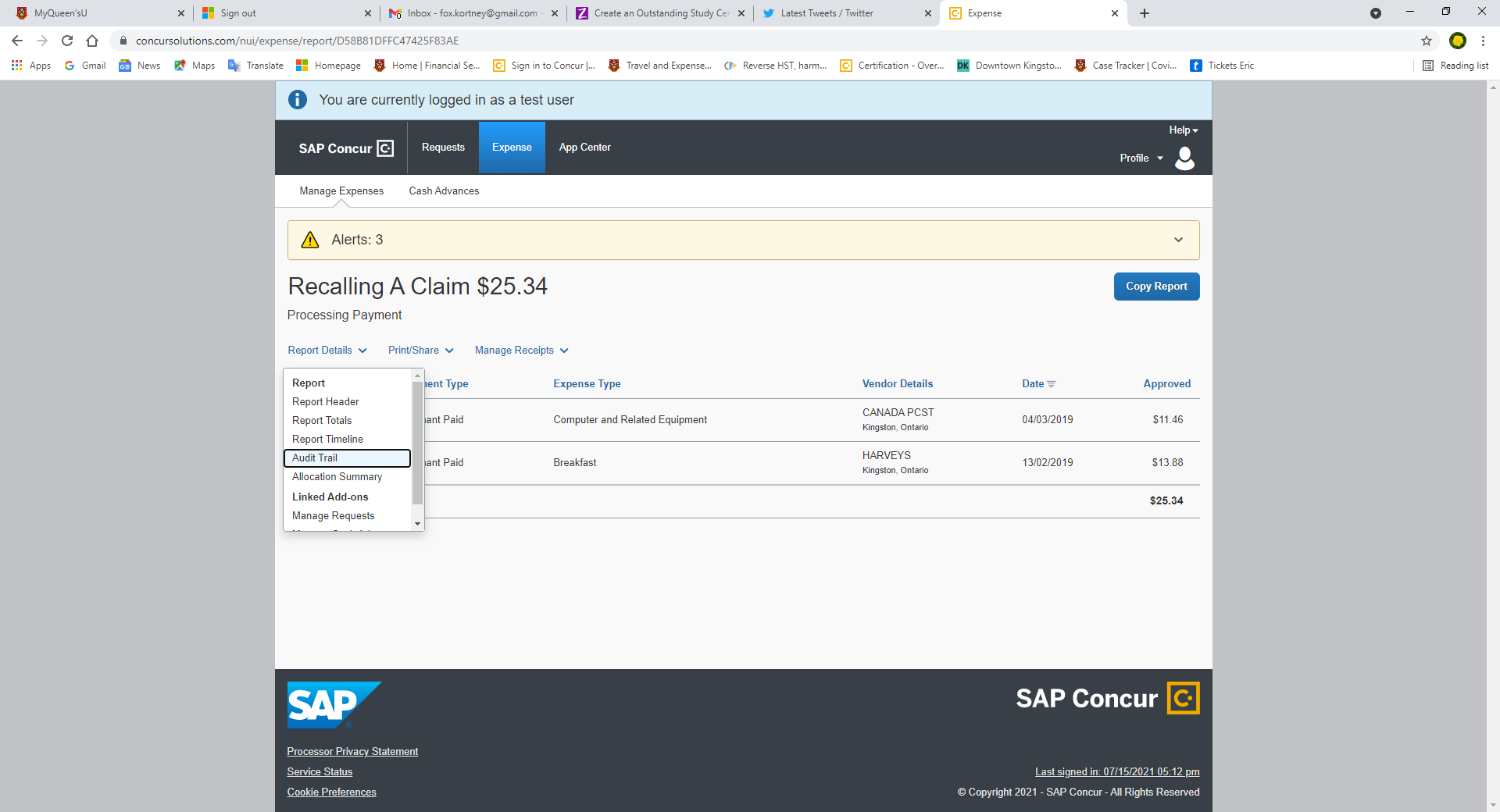
**Audit Trail**

When an ERS claim is created, an Audit Trail is generated to track the details about field-level changes. When a delegate is logged into ERS there name will show on the Audit trail. This includes any and all changes made at all levels, from creating to payment.

The following actions are permanently recorded:

* Name of the person who last modified the travel or expense claim, cash advance request or research participant advance.
* Name of the person who submitted the report/request and the time it was submitted.
* Name of the person who approved the report/request and the time it was approved.
* Every time the request/claim was returned and the accompanying notes.
* When payment was made and how, noting the payment reference number as well.

To review the audit trail, open the claim and go to the ‘Details’ drop-down menu. Under ‘Report’ you will see ‘Audit Trail’, select it.



A new window will open. It will list everyone who has interacted with the claim, allowing those involved to track who has accessed and altered the claim. And it is also where Internal and External Audit will look to see if the proper approval has been given.

**Delegate Approver**

A Delegate Approver acts on behalf of an authorized approver, and they will inherit the authority of that authorized approver. If there are any issues with approved claims the delegate approver will be called to answer/explain the same as the authorized approver.

If the individual, you are setting up as a delegate does **not** have approver status you will **not** be able to set them up as a Delegate Approver. The ‘Can Approve’ and ‘Can Approve Temporary’ will be grayed out (see page 2).

Alternatively, you can setup a Previewer by selecting the ‘Can Preview for Approver’ option. This will allow the delegate to view the claim/request and ensure that it meets requirements for the department and audit. They will alert the approver when the claim is ready for them.

For more information, please see the ‘Previewer’ document.

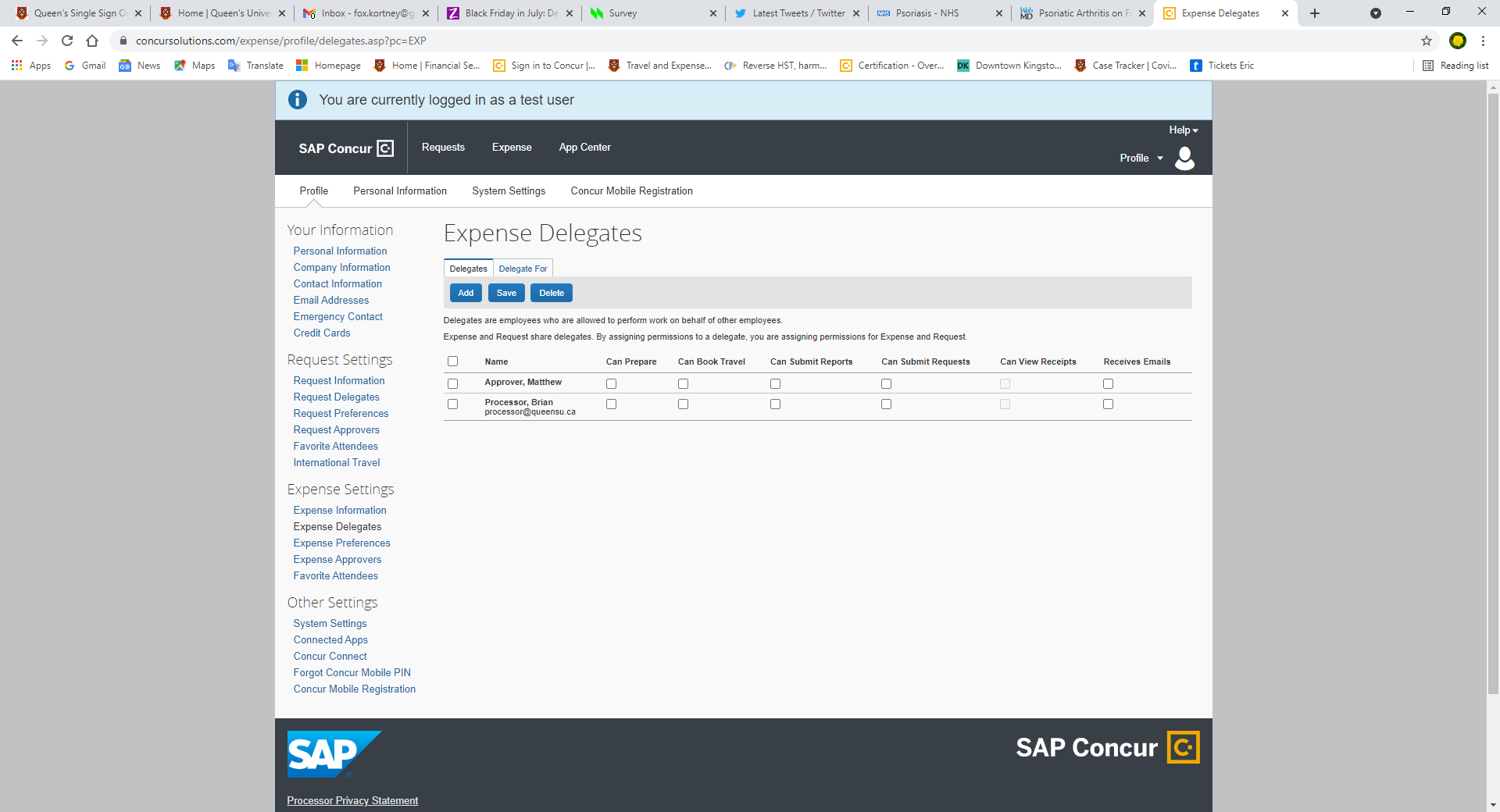
**Temporary Approval Designation:** This allows an Expense/Request user (with the role of approver) to act as a temporary approver for a specific period.

An example of this would be if the Dean of the department is on vacation or an extended leave, the individual who is covering for the Dean or acting as Temporary Dean can be granted this designation. This grants them the same approval authority of the Dean, allowing claims/requests to be approved.

When you select the ‘Can Approve Temporarily’ option you will have to enter a date as well. When the end date passes the temporary approver status for the delegate will be revoked automatically.

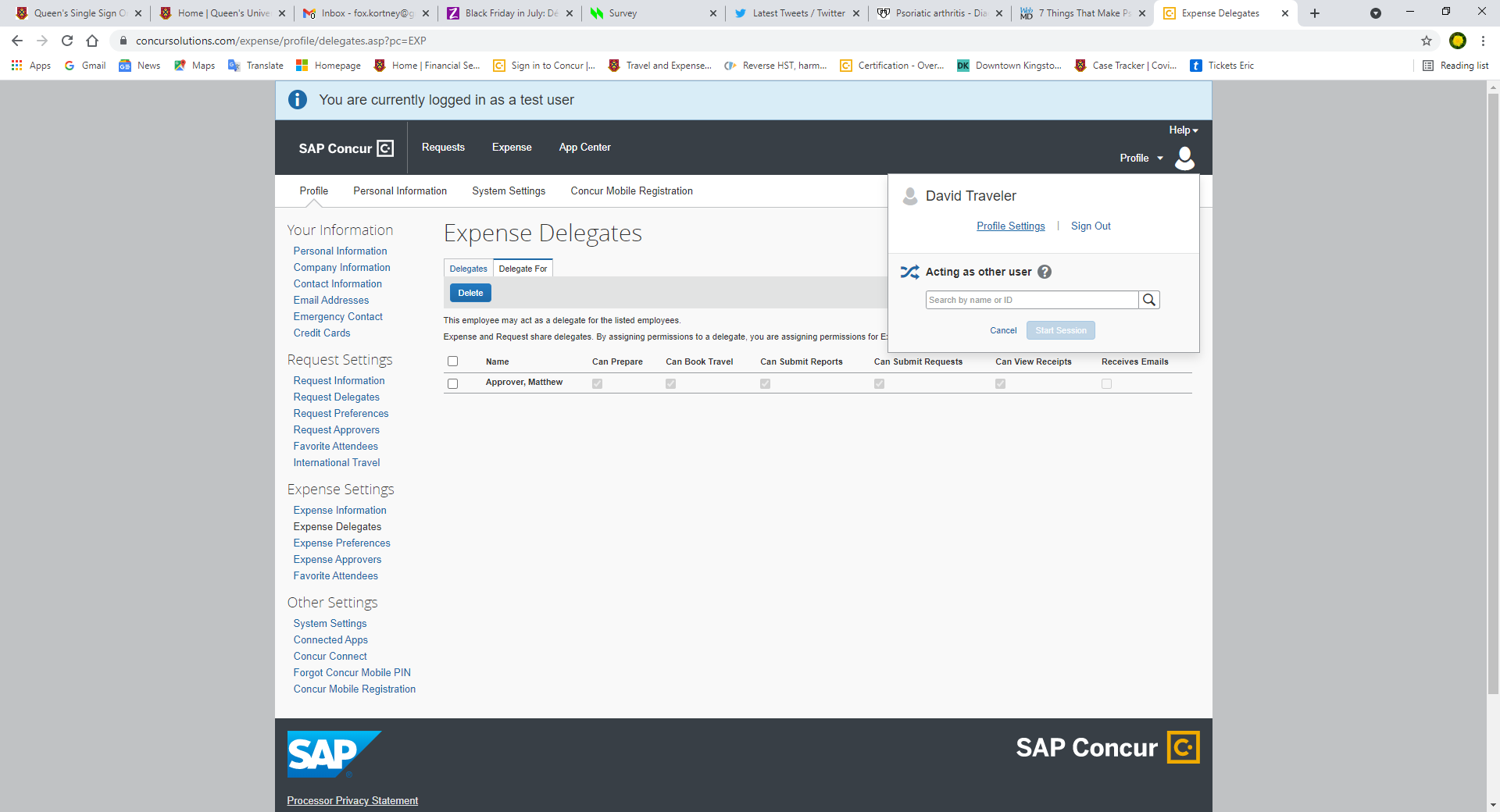
**Acting as a Delegate**

To sign in as a delegate for another user, click on the **Profile** button in the top right corner of your screen.



A window will open, you will have to search for the individual by **LAST** name.

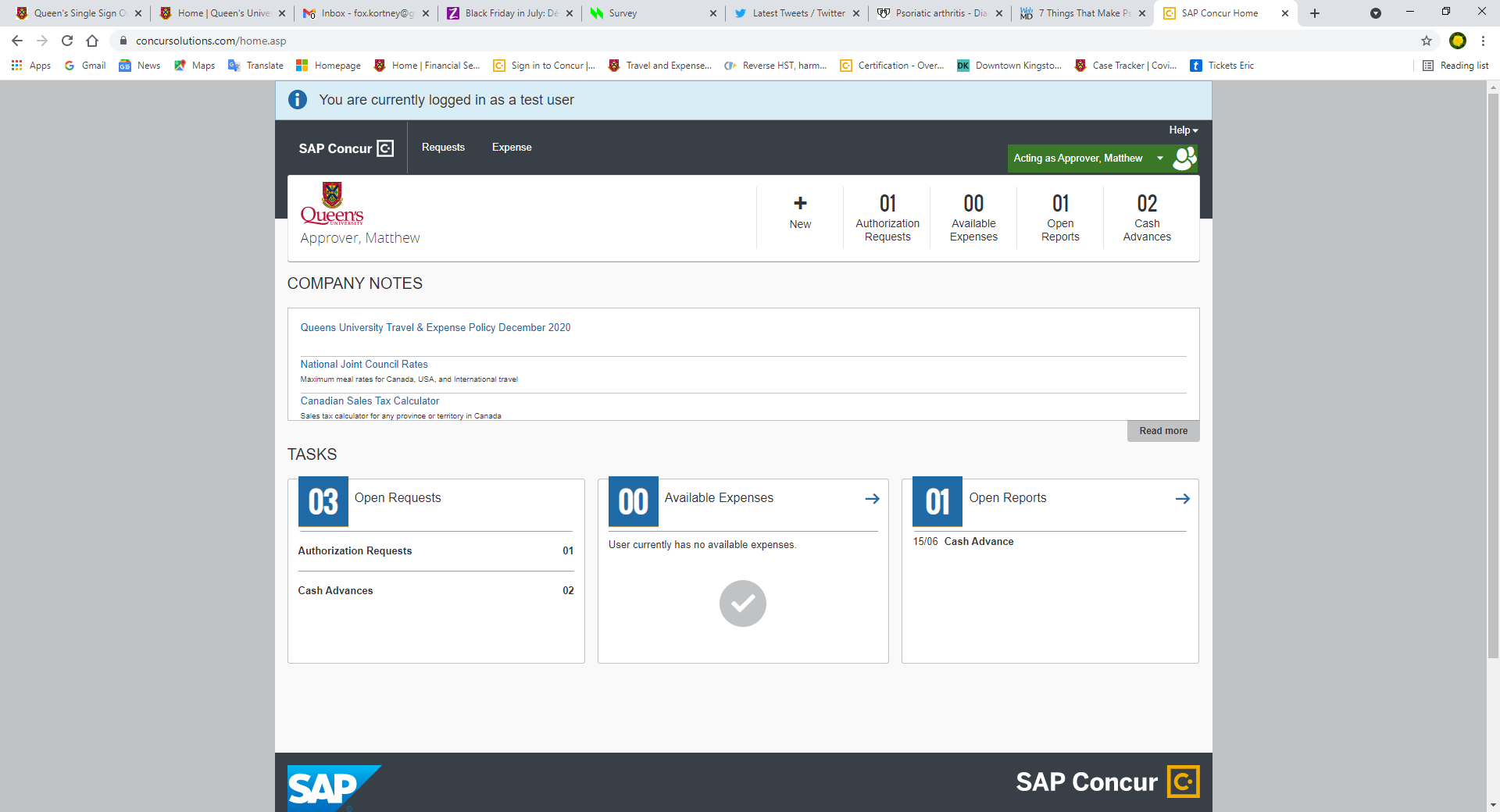
* If it is a hyphenated last name, you may need to try both names together and then separately, with and without the hyphen.



Select the name of the individual from the list that is generated, and the ‘Start Session’ button will become active allowing you to select it.

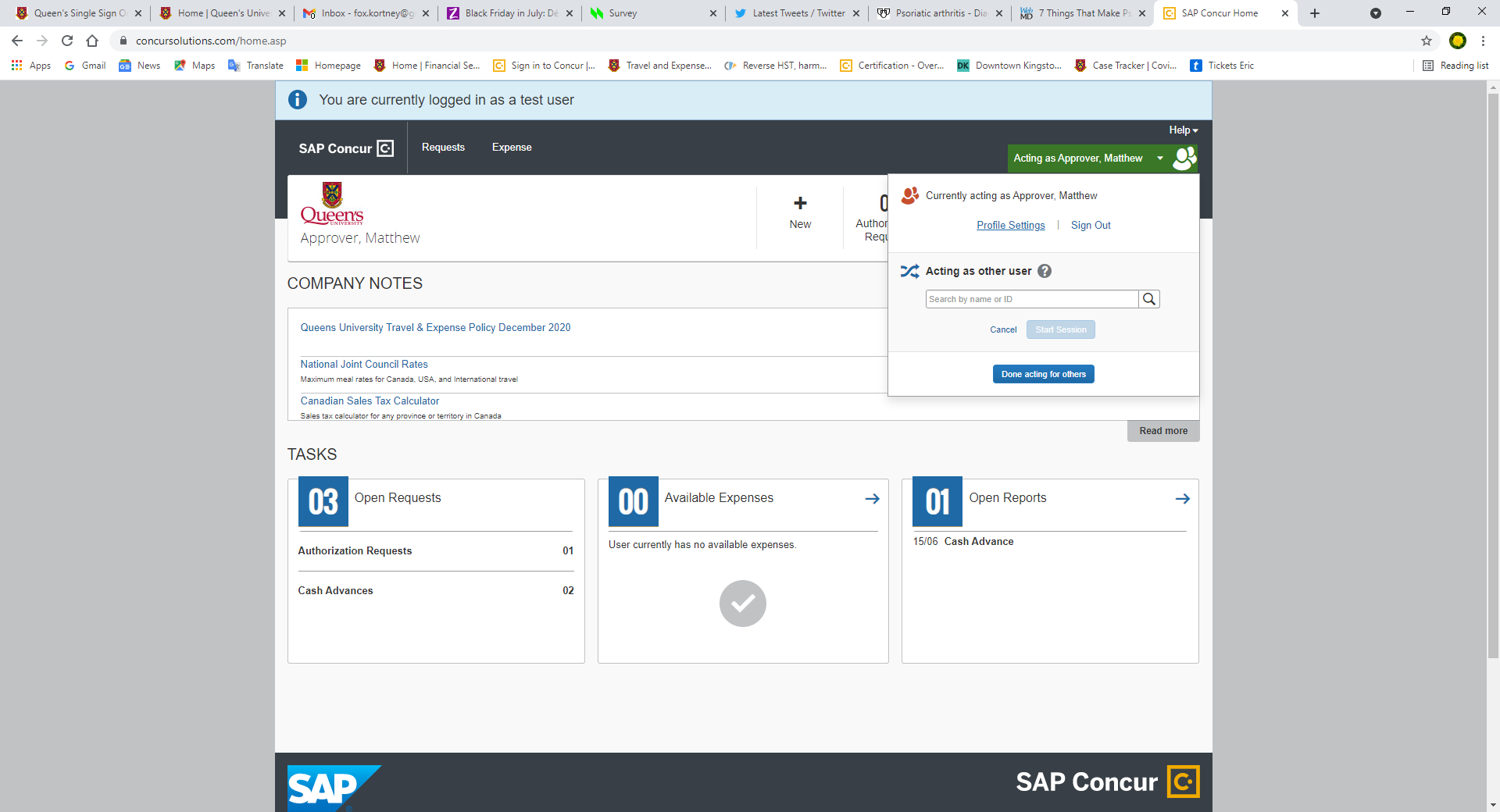
ERS will switch you to the account of the individual you are acting on behalf of.

The ‘Profile’ will now show in green and ‘Acting as Last Name, First Name’.



You can now create and submit Travel or Expense Claims as well as Cash Advance and Research Participant Advance request or track the process of a claim.

To **stop acting** as a delegate click on the green back. At the bottom of the window, you will see ‘Done Acting for Others’. Select it.



You will be logged out of the account and will no longer be acting as a delegate. You will be taken back to your own ERS page, and the ‘Profile’ bar will no longer be green.

**WARNING**: If you have delegate access, please be sure that you are in the correct account when submitting a claim/request.

If you submit a claim under the wrong account, you can recall the claim, see the “Procedure - Creating an Expense Claim” document for detailed steps on how to recall a claim.

If you cannot recall the claim, contact [expenses@queensu.ca](mailto:expenses@queensu.ca) to see if the claim can be returned or cancelled.

For more information on how to set up or act as a delegate please contact [expenses@queensu.ca](mailto:).