DELEGATE ROLES in the ERS

ERS Delegates

Delegate: An Expense or a Request user who has been granted permission to act on behalf of another Expense or Request user in preparing, submitting, approving, etc.

To view Expense Delegates/Request Delegates:
- Click on Profile.
- Profile Settings.

- Expense Delegates: the link will be located in the middle of the page or will be listed under Expense Setting in the menu on the left. (Expense and Request share delegates)
NOTE: By assigning permissions to a delegate, you are assigning permissions for both Expense and Request.

Too Add a Delegate: Expense Prepare and Submit

The delegate will have the ability to create and submit travel and expense claims.

- When you are in the Expense Delegate screen you will see three buttons, “Add” “Save” and “Delete”.

- Select the “Add” button.
- A new search bar will open, you will need to search for your intended delegate by LAST name.

- When you see the name, click on it and it will automatically be added.
- Now you will need to select the appropriate check boxes. This is in reference to if the delegate can only create a claim, preview or approve a claim.

- Once you have made your selections select the “Save” button.
- Your delegate is now set up.
- We recommend selecting the ‘Receives E-mails’ box so the delegate is alerted to any changes in the claim.
To Add: A Delegate Approver/Previewer

Ability to act on behalf of an authorized approver, inheriting the authority of that authorized approver, including that authorized approver's limits (if any), currencies, and exception authority (if any).

Note regarding addition of Delegate:
Claimants have the option of establishing a delegate to prepare or submit expense claims or travel requests in the ERS. Claimant responsibilities cannot be delegated. By establishing a delegate, you provide the delegate with access and consent to view all information in your "My Profile" page.

Temporary Approval Delegation: Allows an Expense/ Request user (with the role of Approver) to act as a temporary Approver for a specified period of time (e.g. reroutes approval requests to a new Approver while the main Approver is on holidays).

Delegate For (another user)
If you are the delegate for a user or Approver you can view the information showing who you are the delegate for and the permissions you have by clicking on the Delegate For link.
Delegate Audit Trail

While a delegate is acting on behalf of another ERS user, an audit trail is created, which tracks all of the actions performed. Details about field-level changes after the report or request is submitted are recorded and displayed.

The following actions are permanently recorded:

- Name of the person who last modified the expense report, cash advance request, request category, expense, or request.
- 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.

Acting as a Delegate

In order to sign in as the delegate for another user, click on Profile and the following window will open:

- Either click on the drop-down under “Administer for another user...” or begin entering the last name of the person you want to administer for
- Select the name of the person from the drop-down menu
- Click Apply
- The ERS page will open as the person you are the delegate for
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To stop the session where you are being the delegate for another user:

- Click on the button, “End admin session”
- You will now be back on your own ERS page