

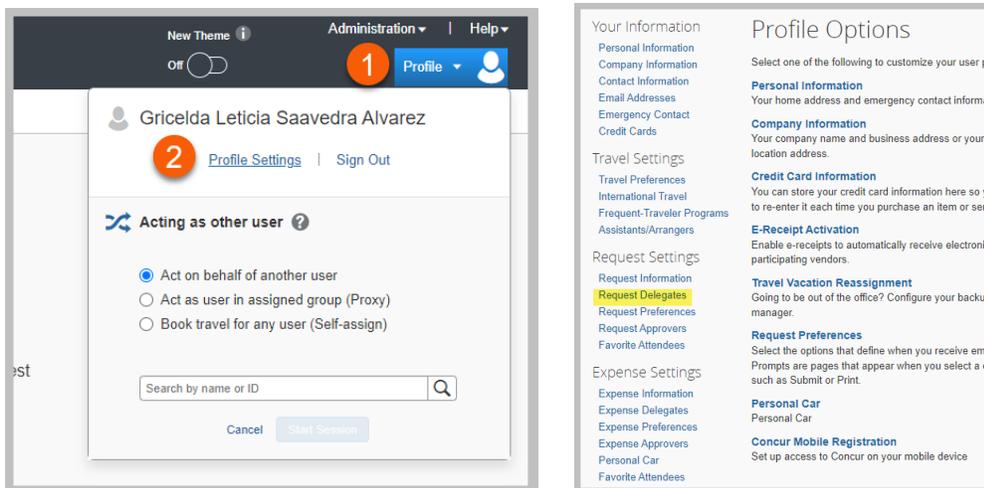
How to - Assign Request and Expense Delegates

Request Delegate: Allows an employee to act on behalf of another user on preparing, submit and view receipts for Travel Requests.

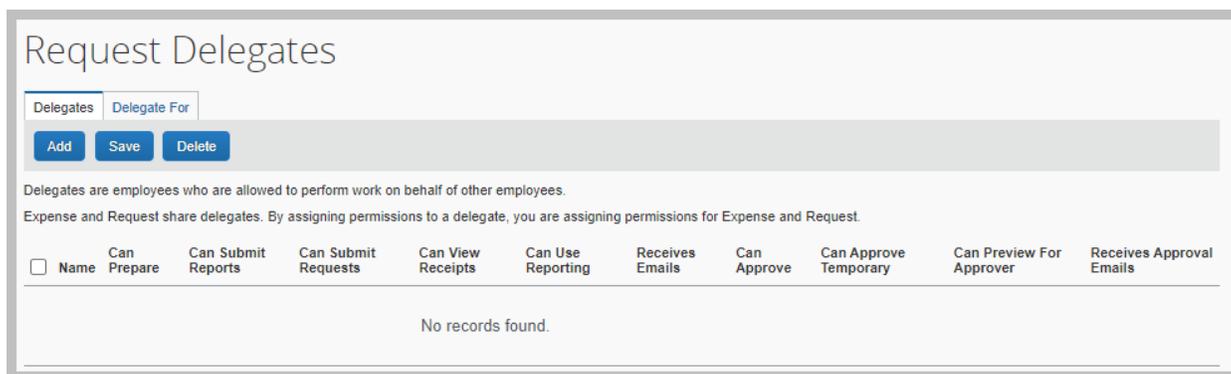
Expense Delegate: Allows an employee to act on behalf of another user on preparing, print, view, edit and submit expense reports, this includes Travel, Business Expense Reimbursements and Credit Card Reconciliation.

Login to iTravel+ through my.utrgv.edu, once on the landing page:

1. Click on “Profile” on the upper right hand corner
2. Click “Profile Settings”,
Click on ”Request Delegates”

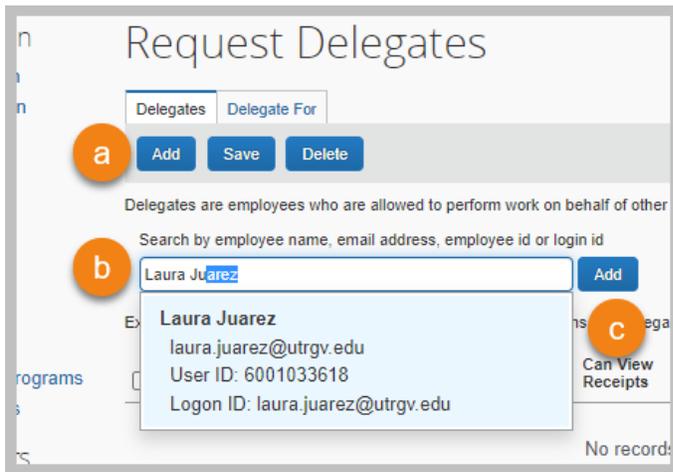


From the following screen users may assign / update their Request and Expense Delegates as needed.

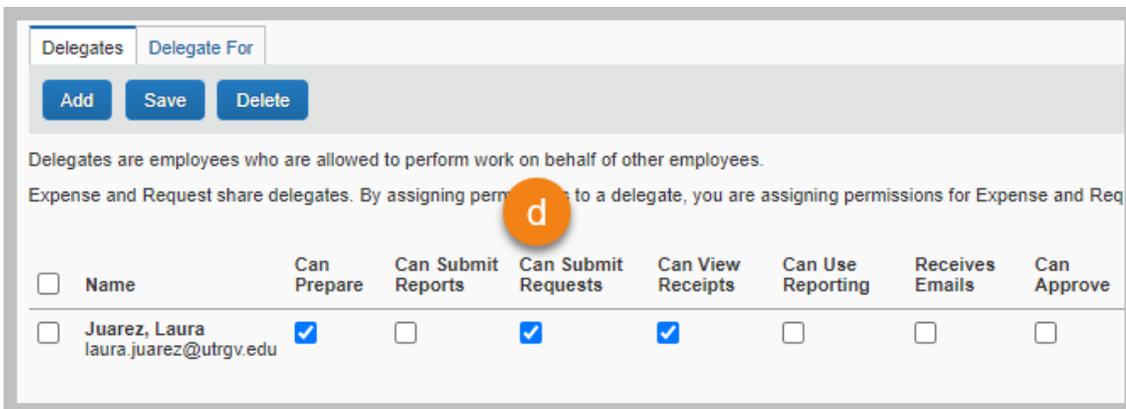


Add a Delegate:

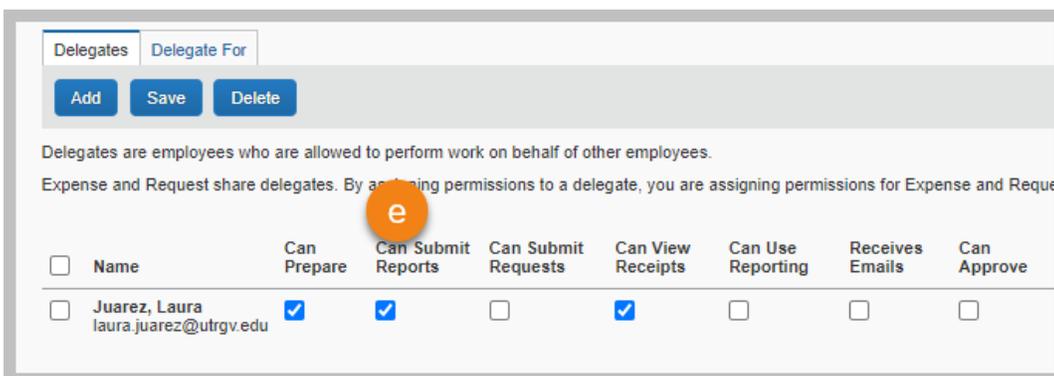
- a. Click the “Add” option
- b. Search for user by entering their name, email address or employee ID#
- c. Click “Add”



- d. To assign the selected user as a “Request Delegate” click the “Can Submit Requests” option. Note that the “Can Prepare” and “Can View Receipts” options are automatically be checked off. If you Request Delegate will also be your Expense Delegate, select the “Can Submit Reports” option.



- e. To assign the selected user as an “Expense Delegate” click the “Can Submit Reports” option. Note that the “Can Prepare” and “Can View Receipts” options are automatically be checked off. If you Expense Delegate will also be your Request Delegate, also select the “Can Submit Requests” option.



- f. Save your changes

Delegates Delegate For

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request

| <input type="checkbox"/> | Name | Can Prepare | Can Submit Reports | Can Submit Requests | Can View Receipts | Can Use Reporting | Receives Emails | Can Approve |
|--------------------------|-----------------------------------------|-------------------------------------|--------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | Juarez, Laura laura.juarez@utrgv.edu | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Example of selections for Request and Expense Delegates

Delegates Delegate For

Add Save Delete

Delegates are employees who are allowed to perform work on behalf of other employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request

| <input type="checkbox"/> | Name | Can Prepare | Can Submit Reports | Can Submit Requests | Can View Receipts | Can Use Reporting | Receives Emails | Can Approve |
|--------------------------|------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------|-----------------|--------------------------------------------------|
| <input type="checkbox"/> | [Redacted] | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | | Request and Expense Delegate |
| <input type="checkbox"/> | [Redacted] | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | | Request Delegate <input type="checkbox"/> |
| <input type="checkbox"/> | [Redacted] | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | | Expense Delegate <input type="checkbox"/> |

- g. If user wants to verify what employees they are assigned to as Request or Expense Delegate click on the “Delegate For” tab. This list will show the name of employees that have assigned you as a Request or Expense Delegates.

Request Delegates

Delegates Delegate For

Delete

This employee may act as a delegate for the listed employees.
Expense and Request share delegates. By assigning permissions to a delegate, you are assigning permissions for Expense and Request

| <input type="checkbox"/> | Name | Can Prepare | Can Submit Reports | Can Submit Requests | Can View Receipts | Can Use Reporting | Receives Emails | Can Approve |
|--------------------------|-------------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | Rangel, Maggie maggie.rangel@utrgv.edu | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |