

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",





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

Requ	uest l	Delega	tes							
Delegates	Delegate F	or								
Add	Save	Delete								
Delegates ar Expense and	e employees I Request sh	s who are allowed are delegates. By	to perform work on assigning permissi	behalf of other er ons to a delegate,	nployees. , you are assigning	g permissions for	Expense and	Request.		
Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve	Can Approve Temporary	Can Preview For Approver	Receives Approval Emails
				No records f	found.					

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.

Del	egates Delegate For									
A	Add Save Delete									
Deleg	gates are employees who	are allowed	to perform worl	k on behalf of ot	ner employees.					
Expe	nse and Request share de	elegates. By	assigning pern	d to a dele	egate, you are a	assigning permis	sions for Expe	nse and Req		
	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve		
	Juarez, Laura laura.juarez@utrgv.edu	2								

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.

D	ele	gates Delegate For							
	A	dd Save Delete							
De	leg	ates are employees who	are allowed	to perform work	k on behalf of oth	er employees.			
Exp	per	ise and Request share de	legates. By	as the ning perm	nissions to a dele	gate, you are a	assigning permis	sions for Exper	ise and Reque
				е					
)	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve
)	Juarez, Laura laura.juarez@utrgv.edu	✓			~			

f. Save your changes

Dele	egates Delegate For							
A	dd Save Delete							
Deleg	ates are fees who	are allowed	to perform work	k on behalf of oth	ner employees.		nione for Even	and De
Exper	ise and Request share de	negales. by	assigning perm	issions to a dele	gale, you are i	assigning permis	sions for Expe	nse and Re
	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve
	Juarez, Laura laura.juarez@utrgv.edu							

Example of selections for Request and Expense Delegates

Del	egates Delegate For							_
Deleg	dd Save Delete	allowed to p	perform work o	n behalf of other	employees.			
Expe	nse and Request share deleg	jates. By as	signing permiss	sions to a delega	te, you are as	ssigning permiss	ions for Expen	se and Reques
	Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can Approve
		<			🗹 Red	juest and E	Expense D	Delegate
				2	🗹 Re	quest Dele	egate	
	21.50 yrs o	•	2		🗹 Ex	pense Del	egate	

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 Del	egat	es					
Delegates Delegate For							
This employee may act as a delegence of the second se	jate for the l gates. By as	listed employee ssigning permis	es. sions to a deleg	ate, you are as	signing permissi	ons for Expen	se and Reques
Name	Can Prepare	Can Submit Reports	Can Submit Requests	Can View Receipts	Can Use Reporting	Receives Emails	Can (Approve 1