Updating Your Profile (cont’d)

Request Delegates - *Important*

- Delegates are employees who are allowed to perform work on behalf of other employees.
- Delegates can prepare and submit travel requests, book travel, and prepare, but not submit, an expense report on behalf of the traveler.
- For the initial implementation of PantherExpress Travel & Expense, Delegates will automatically be loaded from the PRISM Internet Expenses application.
- Beyond the initial implementation of the system, it is the responsibility of the traveler to add/delete Delegates.
- To add a delegate:
  - Click Add
  - Search for the person you wish to add as a Delegate, and click Add
  - Check the boxes that correspond with the permissions you are granting to the delegate.
    (*Recommended permissions for Delegates)
    - *Can Prepare* – delegate has authority to prepare expense reports
    - *Can Book Travel* – delegate has authority to book travel (select with Can Submit Requests)
    - *Can Submit Requests* – delegate has authority to submit travel requests
    - *Can View Receipts* – delegate can view electronic receipts that the traveler has sent to Concur. This will automatically get checked, when you select “Can Prepare”
    - *Can Use Reporting* – delegate can run reports
    - *Receives Emails* – delegate receives email notifications
    - Can Approve – this is typically used by an approver to delegate approval authority to someone else. Approval authority can be permanent or temporary.
    - Can Preview for Approver – this is typically used to add an additional level of review, for example, reviewing for proper account number assignment, before the final review. A Previewer cannot approve or reject a report.
    - Receives Approval Emails – Receives Email notifications as the expense report moves through the approval workflow
  - Click Save.
  - To delete a delegate click the checkbox to select the person, click Delete, and confirm deletion.