Acting as a Delegate

If you have been assigned to work as a delegate, your delegator will define which tasks you can complete, such as preparing reports, submitting reports, etc.

To work as a delegate:

- 1. Click Profile > Act on behalf of another user.
- 2. Select the appropriate user's name.
- 3. Click **Start Session**.

NOTE: Notice that the **Profile** menu now displays **Acting as** and shows the name you just selected.

4. You are now officially working on behalf of that person. Complete the normal processes of creating reports, printing, etc.

To select a different user, follow the same steps but select a different name.

To return to your own tasks, click **Acting as**, and then click **Done acting for others**. **NOTE** Notice that the **Profile** menu now appears.

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Reviewing and Approving an Expense Report

To approve a report "as is":

- On the home page, in the Required Approvals section of My Tasks, click Expense Reports. The Reports Pending your Approval page lists the awaiting reports. Select the report you want to open.
- 2. Review the report details, and then click **Approve**.

Sending Back an Expense Report

To return the entire expense report to the employee for correction:

- On the home page, in the Required Approvals section of My Tasks, click Expense Reports. The Reports Pending your Approval page lists the awaiting reports. Select the report you want to open.
- 2. Click Send Back to Employee. The Send Back Report window appears.
- 3. Enter a **Comment** for the employee, explaining why you are returning the report.
- 4. Click **OK**

Adding an Additional Review Step

Depending on your company's configuration, you might also see an