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.