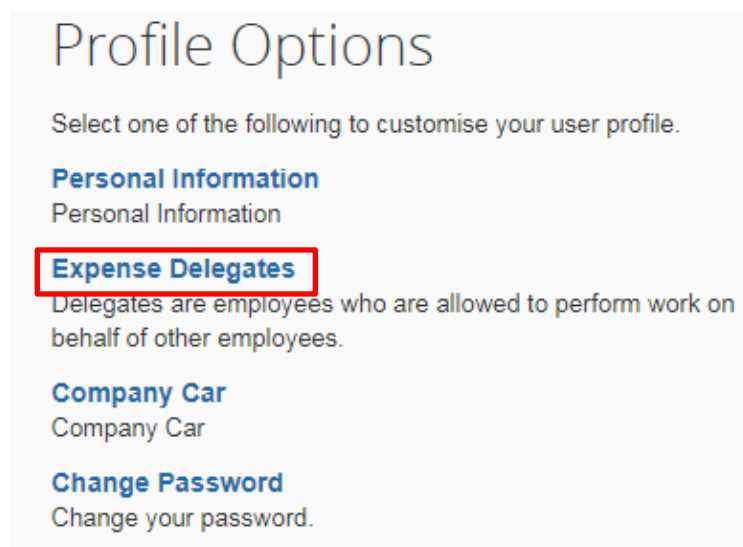


Setting up and acting as a delegate

Delegates can approve or reject claims or submit claims on your behalf. Approvers should set a delegate as soon as possible to ensure claims can be approved if they are away.

Setting up a delegate:

1. Log in and go to **Profile** followed by **Profile Settings** and click **Expense Delegates**

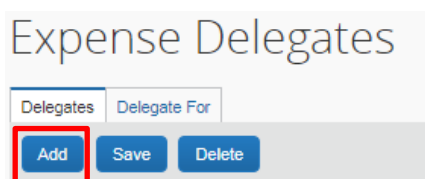


Profile Options

Select one of the following to customise your user profile.

- Personal Information**
Personal Information
- Expense Delegates**
Delegates are employees who are allowed to perform work on behalf of other employees.
- Company Car**
Company Car
- Change Password**
Change your password.

2. Select **Add**

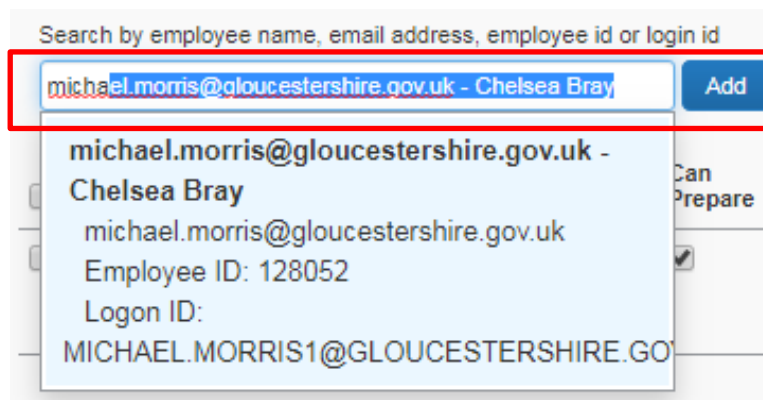


Expense Delegates

Delegates Delegate For

Add Save Delete

3. Search for the person using their email address, employee ID or login ID



Search by employee name, email address, employee id or login id

michael.morris@gloucestershire.gov.uk - Chelsea Bray **Add**

michael.morris@gloucestershire.gov.uk - Chelsea Bray
michael.morris@gloucestershire.gov.uk
Employee ID: 128052
Logon ID:
MICHAEL.MORRIS1@GLOUCESTERSHIRE.GO

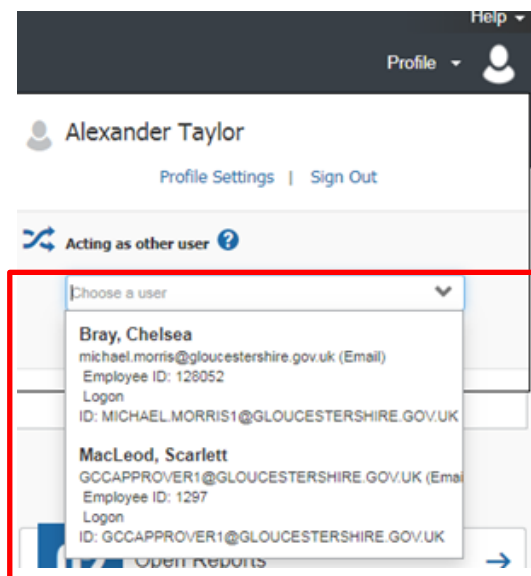
- Next, using the tickboxes select all the tasks you want to allow your delegate to be able to perform (**Can prepare / submit claims, can view receipts, can receive emails, can approve – if you want them to only approve / reject claims for a certain time you can set them up as a temporary approver using the calendar, and receive approval emails**):

Can Prepare	Can Submit Claims	Can View Receipts	Receives Emails	Can Approve	Can Approve Temporary	Receives Approval Emails
☒	☒	☒	☐	☐	☐	☐

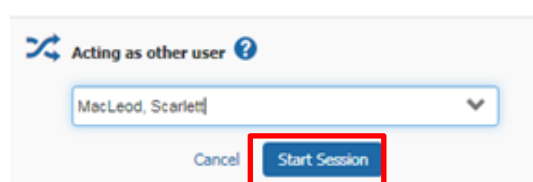
- Click **Save**

Acting as a delegate:

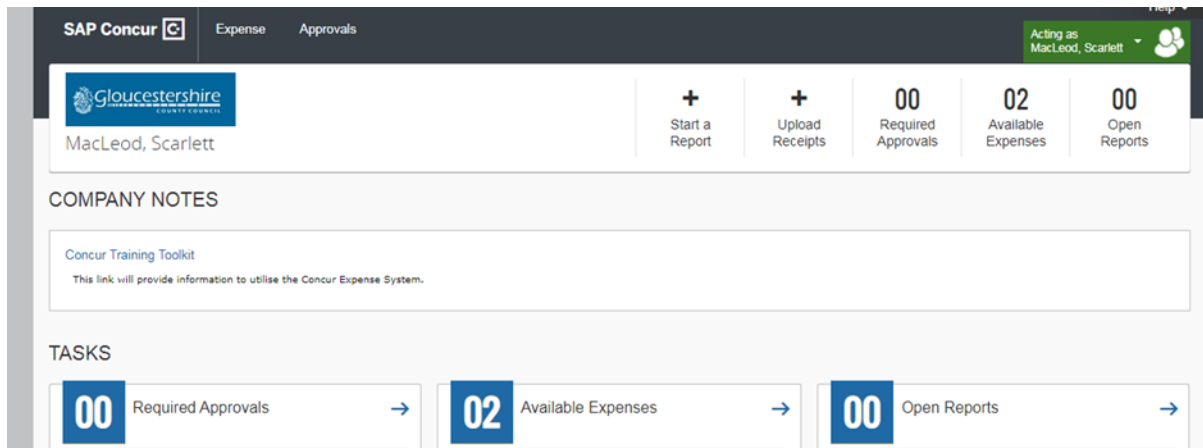
- Under **Profile** on the home screen you will see a dropdown labelled **Acting as other user**. Use this dropdown to select the user you would like to act as a delegate for – if you cannot see the name of the person you would like to act as a delegate for call ContactUs on 01452 425888 followed by option 3 then 1



- Once you have selected a user click **Start Session**



3. While you're acting as a delegate a green box will appear in the top right informing you who you are acting as a delegate for. Approve / submit claims as normal for the user (view our helpsheets on Staffnet if you're not sure how to do this)



When you're done click the green box and select **Done acting for others**. You will then be returned to your home screen

