UCLA Express

Acting as a Delegate

A delegate is a user who is granted permission to act on behalf of another user to perform tasks such as preparing an expense report. For information on how to assign delegates, refer to the Updating Your Expense Profile guide.

Note: To act on behalf of another user, **they** must assign you as their delegate.

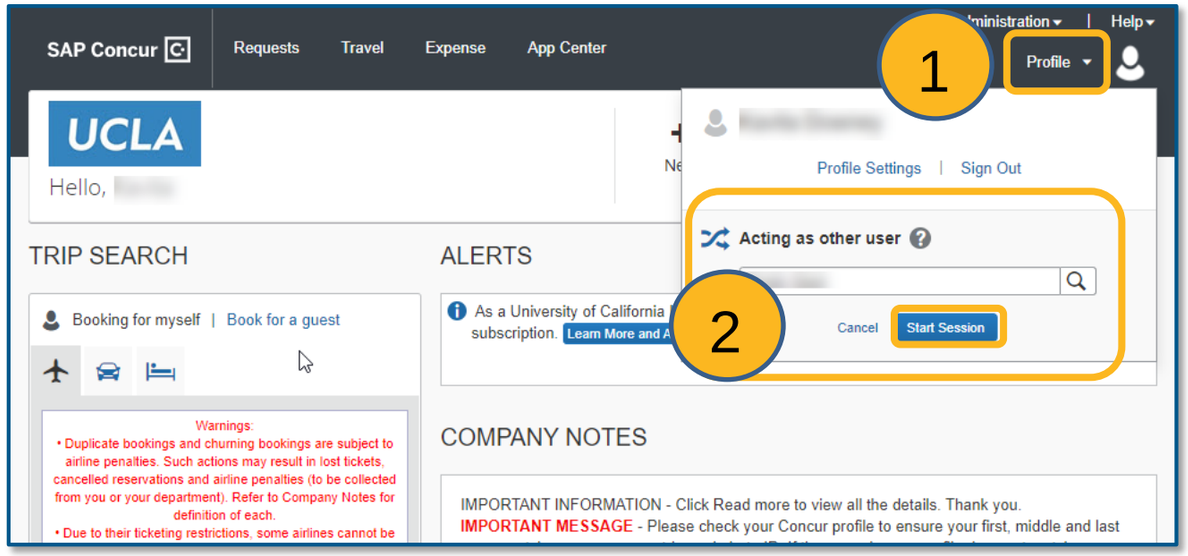
Watch ▶ the tutorial.
Please note, this is a 3rd party video which provides an overview of the steps. For specific instructions for UCLA, please refer to this written guide.

For further information, please refer to the Certification of Travel Expenses section (p 42) of UC Policy G-28.

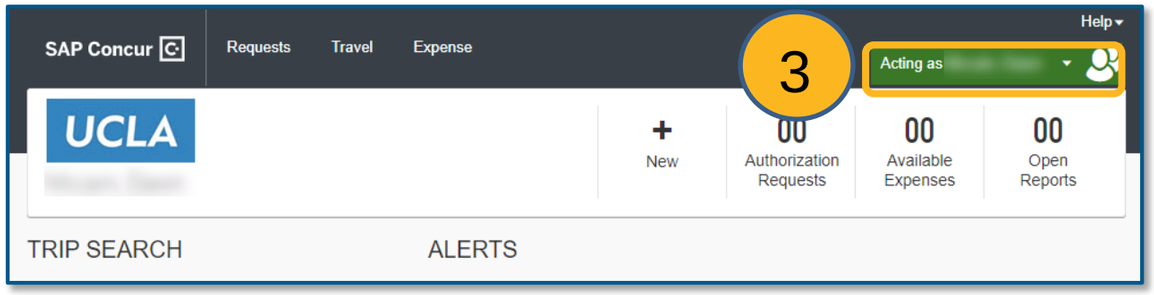
1) Click **Profile**

2) Search for and select the person on whose behalf you want to act

Click **Start Session**



3) You are now acting as a delegate for this user. Proceed as you would when acting as yourself (preparing reports, submitting requests, etc.)



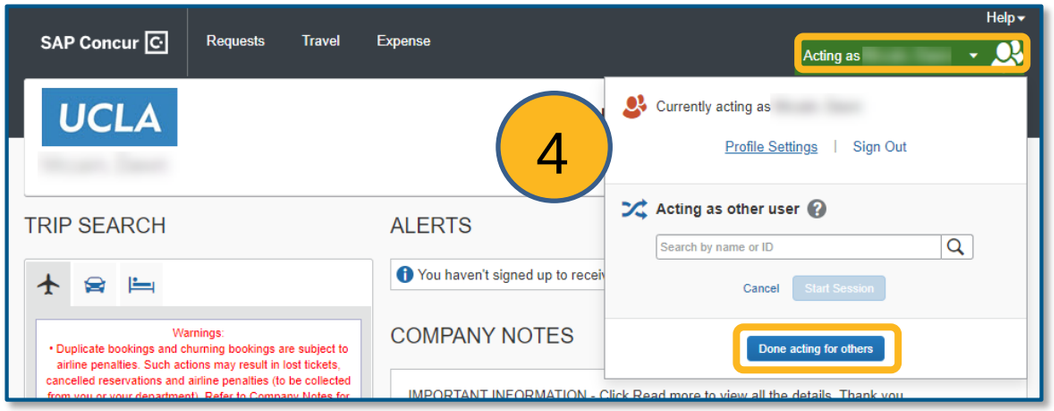
Note: Your rights and privileges as a delegate are determined by the user you are delegating for. If adjustments need to be made, the user must make those by updating their profile.

You will **not** be able to submit a report on behalf of other users. Users must submit their own report.

Tip: When a report is ready for submittal, click the submit button. The system won't let you submit the report for the user. BUT it will alert you to any errors/exceptions in the report. Correct the errors and click submit again. The system will send an email (the following day) to the user that there is a report ready for their review and submission.

4) To return to working as yourself, click **Acting as *<user name>***

Click **Done acting for others**



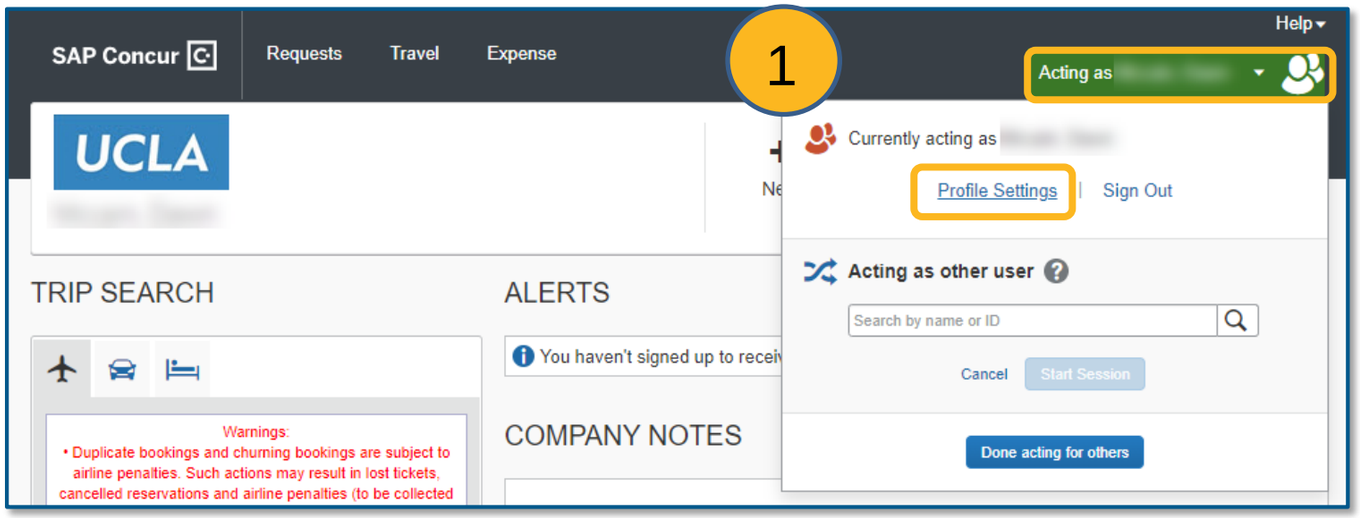
Acting as a Delegate

Emailing Receipts on Behalf of a User

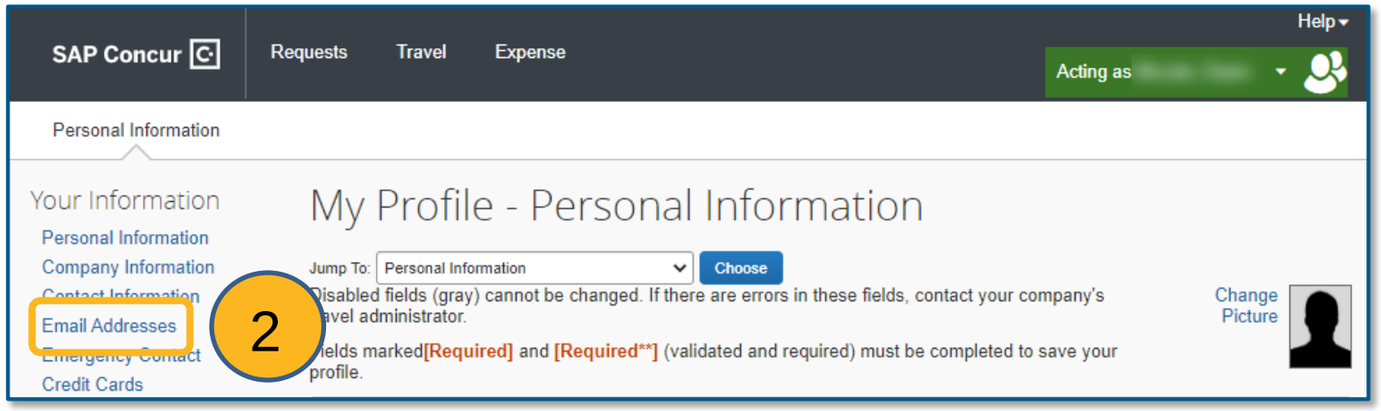
To email receipts on behalf of the user you are working for, both you and the user will need to individually verify your own email addresses in your own profiles.

1) Follow the steps on page 1 of this guide to search and select the user you want to act as.

Click **Acting as <*user name*>**, and then click **Profile Settings**.



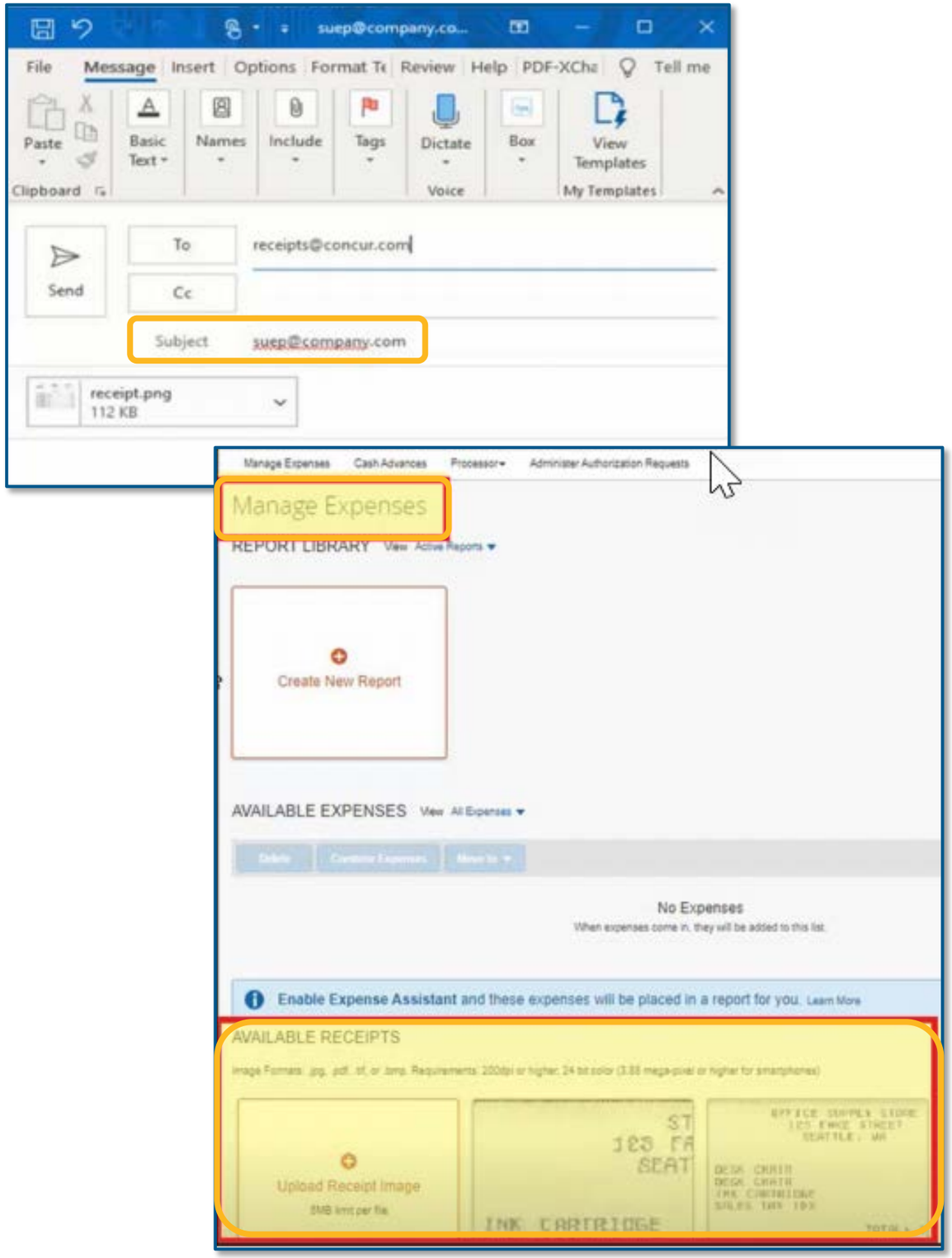
2) Click **Email Addresses**.



Once both email addresses are verified, you can send receipt images for reporting from your laptop or from a mobile device to receipts@concur.com. If you have the ExpenseIt add-on product, send your receipt images to receipts@expenseit.com.

Acting as a Delegate

When you are sending receipts on behalf of another user, enter **only their email address** in the Subject: line and attach the appropriate receipt(s).



Once you email the receipts and are acting on the user's behalf, the images are viewable and ready for use in reporting from **the Manage Expenses** screen in the **Available Receipts** section.

Acting as a Delegate

Preview Reports for an Approver

If you are the delegate for an Approver, and they delegate the **Can Preview for Approver** access to you, follow these steps to review an expense report on the Approver's behalf. Please note, the Approver will need to approve the report, but you are able to preview reports requiring approval and either notify the approver that you have reviewed the report and deem it ready for approval or send it back to employee if more information is required.

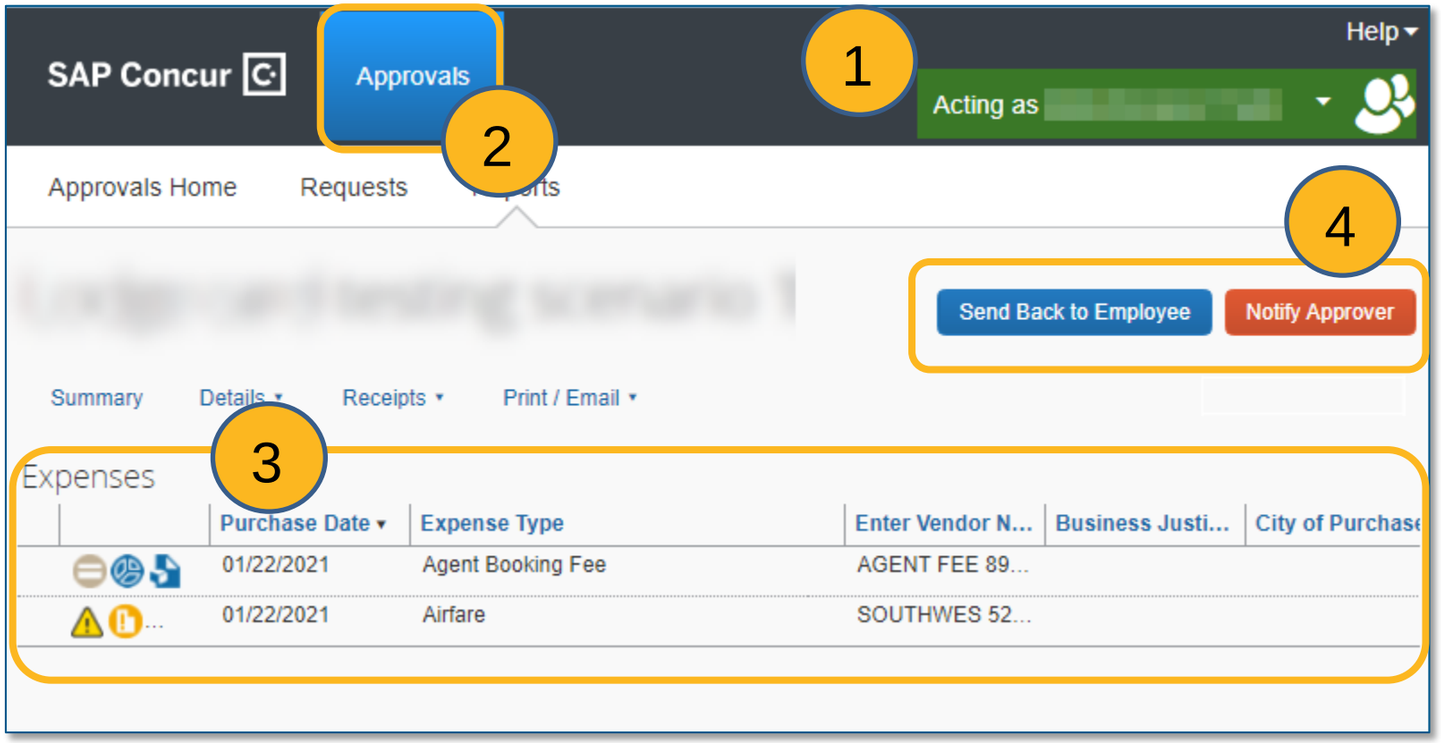
1) Ensure that you are acting as the user who has reports to approve

2) Click the **Approvals** tab

3) Review the reports* as needed

*For more information on the review steps, refer to the Reviewing & Approving an Expense Report guide

4) Select either the **Send Back to Employee** or the **Notify Approver** button



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