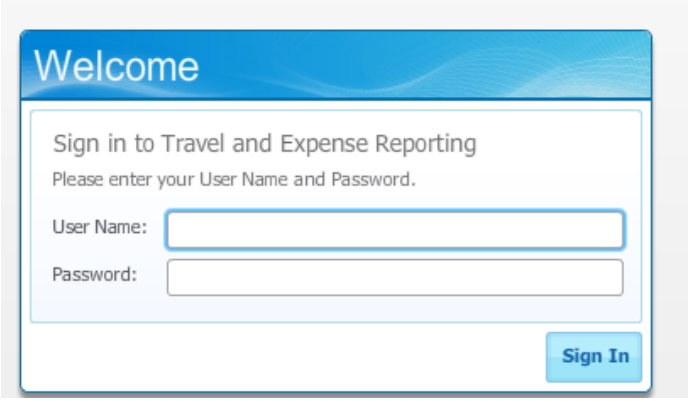
Mississippi State University

Travel Module

Delegate Manual

Travel Module Login



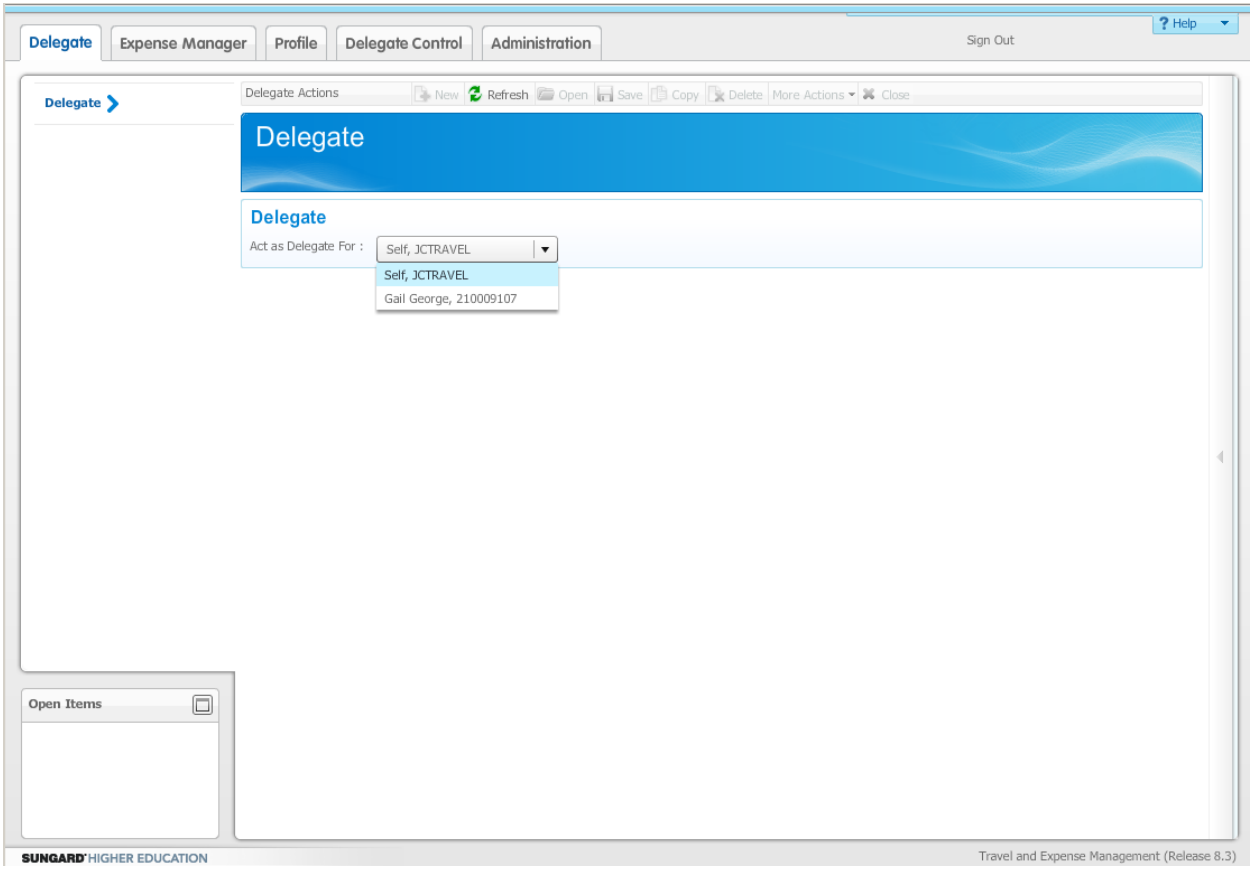
www.tem.travel.msstate.edu

Username: MSU ID
Password: Net Password

Delegation

Introduction

The **Delegate** workspace for individuals with the appropriate role assignments appear as tabs on the user interface.



Authorization

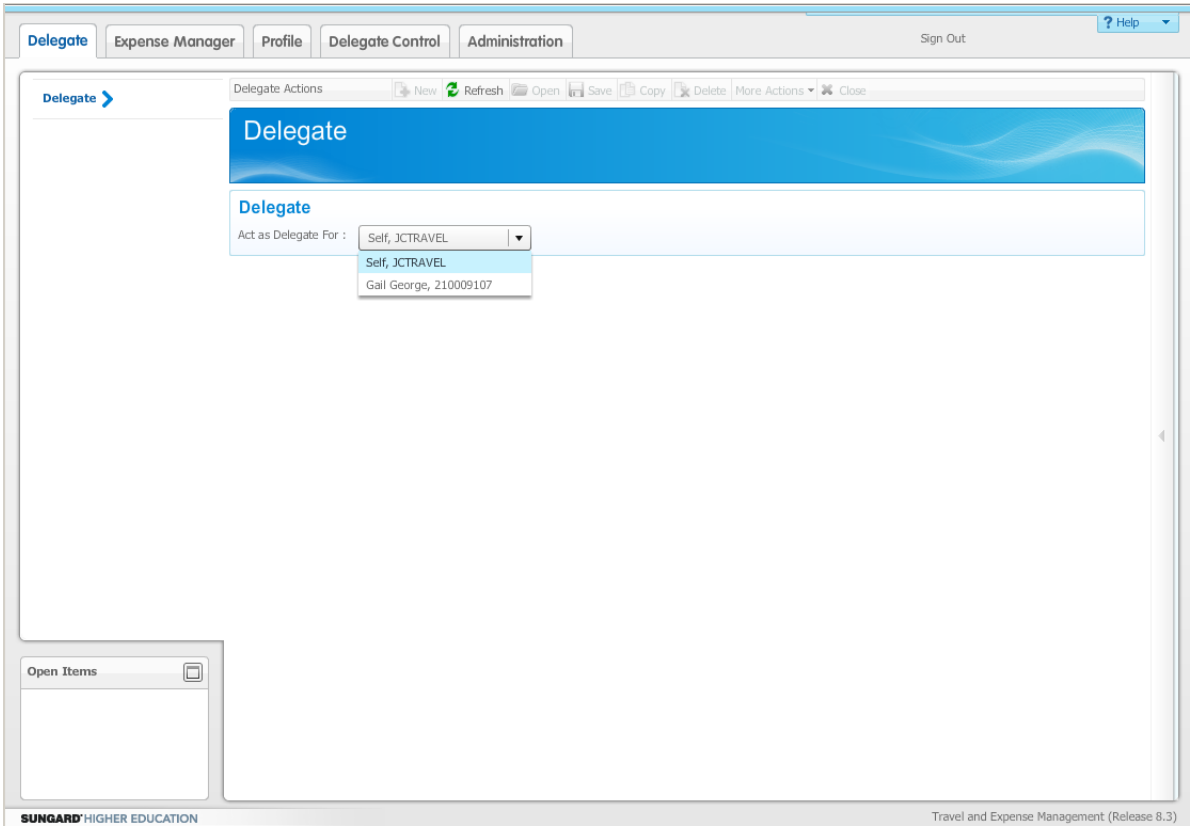
A delegate must be assigned both the Delegate and User roles in Banner Travel and Expense Management to view and access the **Delegate** tab. Likewise, a delegate administrator must be assigned the Delegate Administrator role to view and access the **Delegate Control** tab. Users without these roles will not see their respective tabs.

In addition, administrators can enable or restrict a traveler's ability to select his or her delegates, as well as reviewing reports that were entered directly by a delegate.

Acting as a Delegate

Introduction

A user who has been designated as a delegate can log into Banner Travel and Expense Management and act on the delegator's behalf.



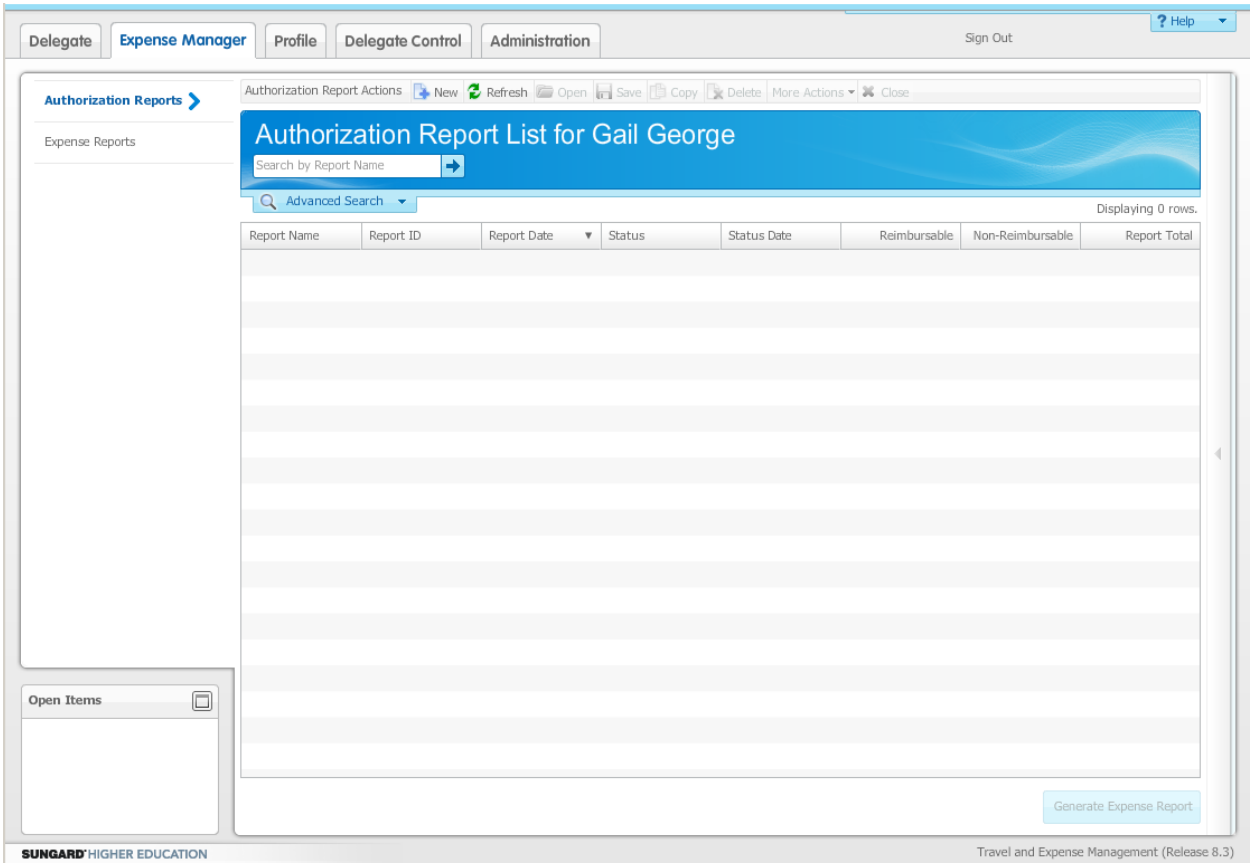
In this example, the user has been selected as a delegate by Jeff Coleburn, and can therefore use the Delegate tab to select for whom he or she will act as a delegate at this time. The default is to act on one's own behalf.

The **Act as Delegate For** field will display those travelers who have designated the current user as a delegate to act on their behalf.

Once the **Act as Delegate For** field has been set, the delegate acts for the specified traveler and can perform most of the functions that typical Banner Travel and Expense Management users would perform for themselves. In addition, if the Delegate Administrator has allowed the delegate to bypass the traveler review of an expense or authorization report, the delegate can submit the report on behalf of the traveler without their review.

Example

Jeff Cole has been designated as a delegate for Gail George. On the Delegate tab, he selected Gail George in the **Act as Delegate For** field. When Jeff clicks the Expense Manager tab, he will see Gail's report list rather than his own.



Notice that Gail's name is displayed, so that the delegate does not lose track of for whom he or she is acting as a delegate.

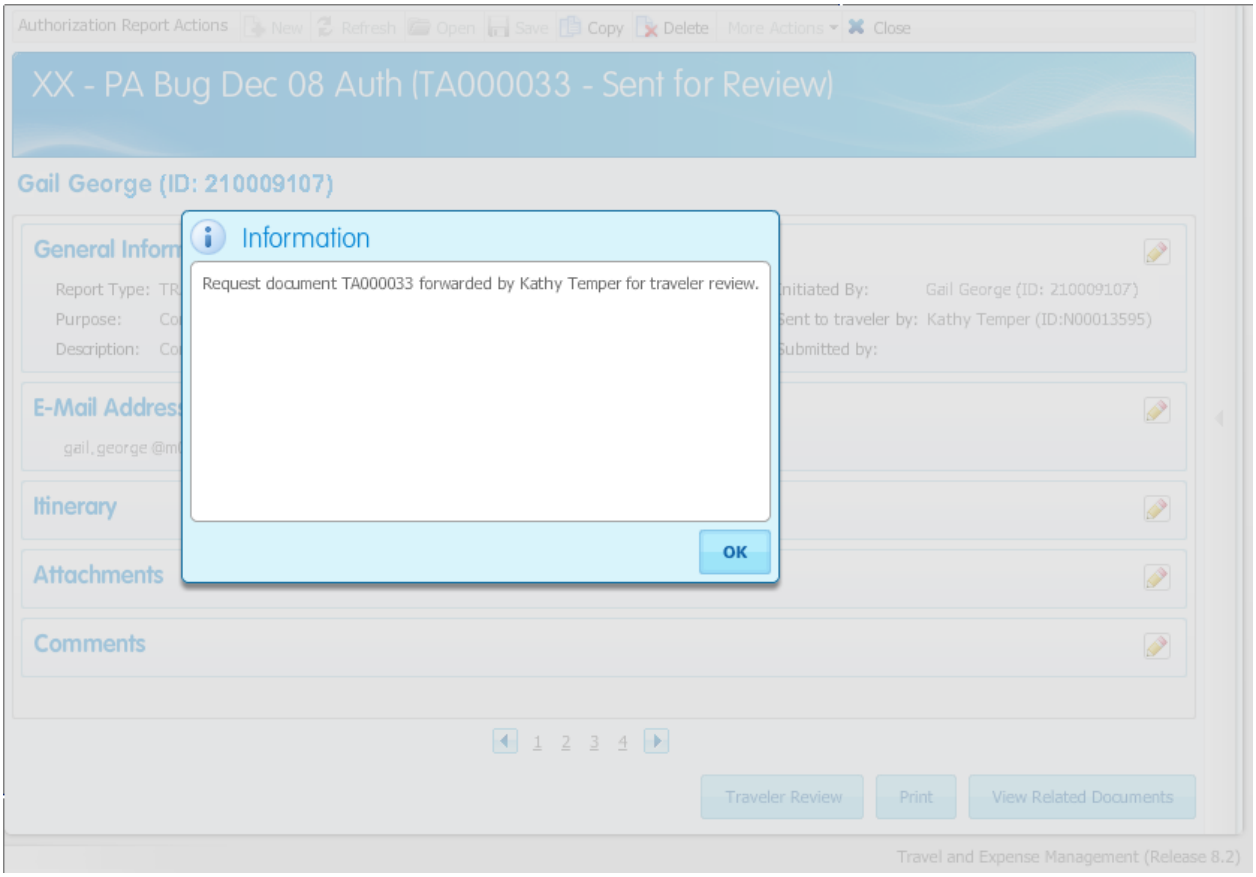
Capabilities

When acting as a delegate for a traveler, the delegate can:

- view, edit, and copy authorization and expense reports for the traveler
- update the traveler's profile
- submit reports to the traveler for review.

Traveler Review

Click the **Traveler Review** button to forward an edited report to the traveler for review.



The traveler will receive an email similar to the following:

From: workflow@sungardhe.com
Subject: Travel & Expense Document Review Request for TA001179
Date: Thu, 30 Jul 2009 16:47:51 -0400

Dear Jeff Cole,

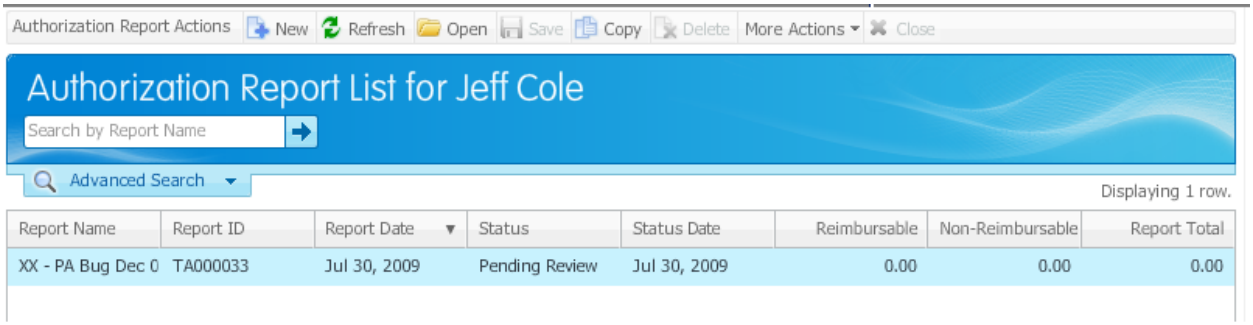
A new Travel and Expense document has been entered in your behalf. Please check the link below or log into the Travel and Expense Management System to review and submit the document.

Use the Travel & Expense Page to review more detail of the expense

Document Code: TA001179
Entered by: Kathy Temper-Delegate
Document Purpose: Conference
Document Description: Scientific yearly conference
Document Comments:
Reimbursement Amount: 500.00

The traveler can then click the link or log into Banner Travel and Expense Management directly to review and submit the report.

When the traveler next logs into the system, he or she will see the report with a status of **Pending Review**.



An administrator can allow individual delegates to bypass this review process and submit reports directly. In these cases, the delegate will see the **Submit** button in place of the **Traveler Review** button.

When this takes place, the traveler will receive a different email indicating that a report has been entered on his or her behalf.

From: dmcgarry@m039079.sungardhe.com
Subject: Travel & Expense Document Approval Request for TR112772
Date: Thu, 30 Jul 2009 16:47:51 -0400

Dear Jeff Cole,

The following Travel & Expense document has been entered on your behalf and sent to Jayne Franklin for approval.

Document Code: TR112772
Entered by: Kathy Temper
Document Purpose: Entertainment
Document Description: None
Document Comments:
Reimbursement Amount: 500.00

Approval Process

When a delegate enters a report for another traveler the delegate will be copied on all email notifications sent to the traveler. Email notifications are sent to the traveler when the approver takes action (approved, denied, returned for correction or forwarded for additional approval.)