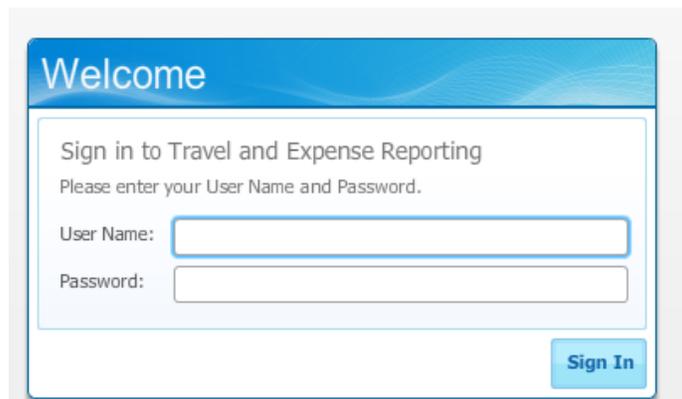


# Mississippi State University

## Travel Module

## Delegate Manual

# Travel Module Login



The image shows a login interface for the Travel and Expense Reporting system. It features a blue header with the word "Welcome" in white. Below the header, the text "Sign in to Travel and Expense Reporting" is displayed, followed by the instruction "Please enter your User Name and Password." There are two input fields: "User Name:" and "Password:". A blue "Sign In" button is located at the bottom right of the form area.

[www.tem.travel.msstate.edu](http://www.tem.travel.msstate.edu)

Username: MSU ID

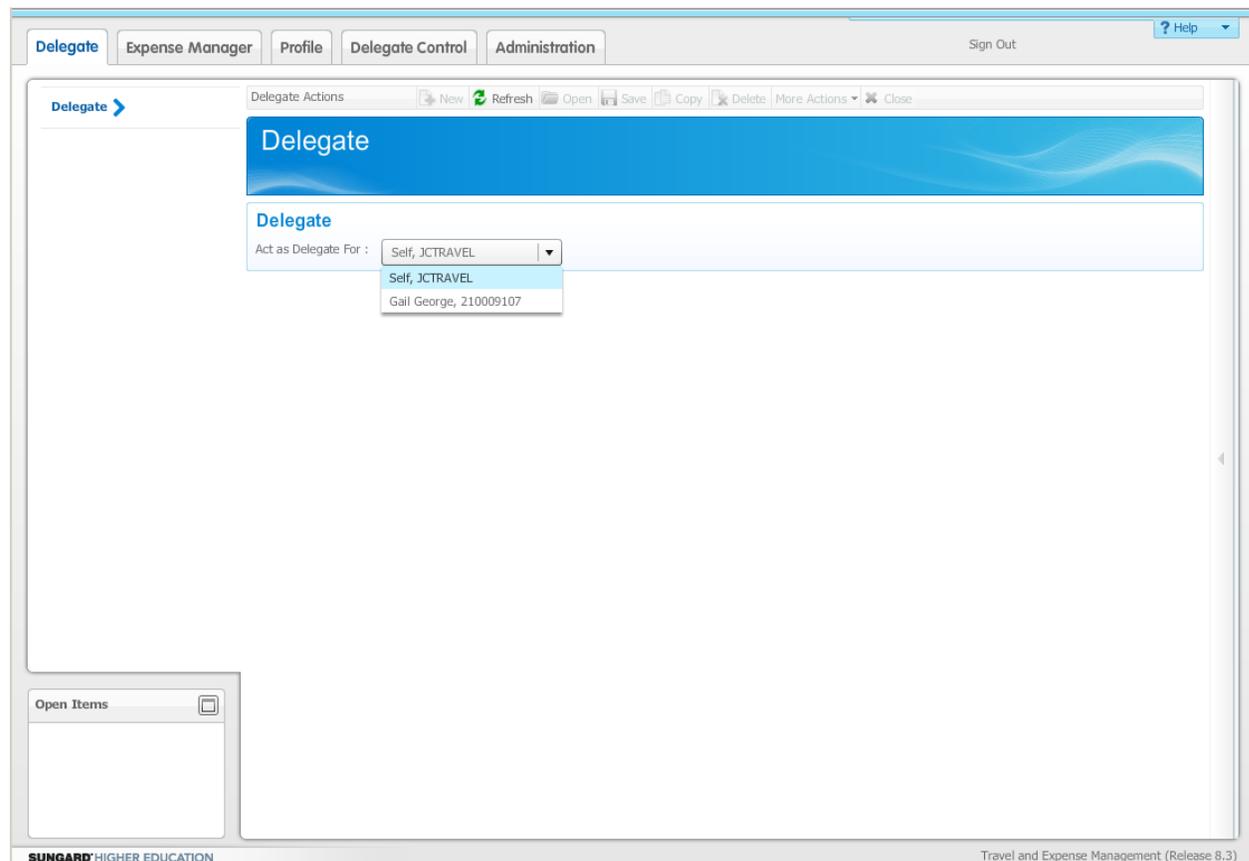
Password: Net Password

# Delegation

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## Introduction

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



## Authorization

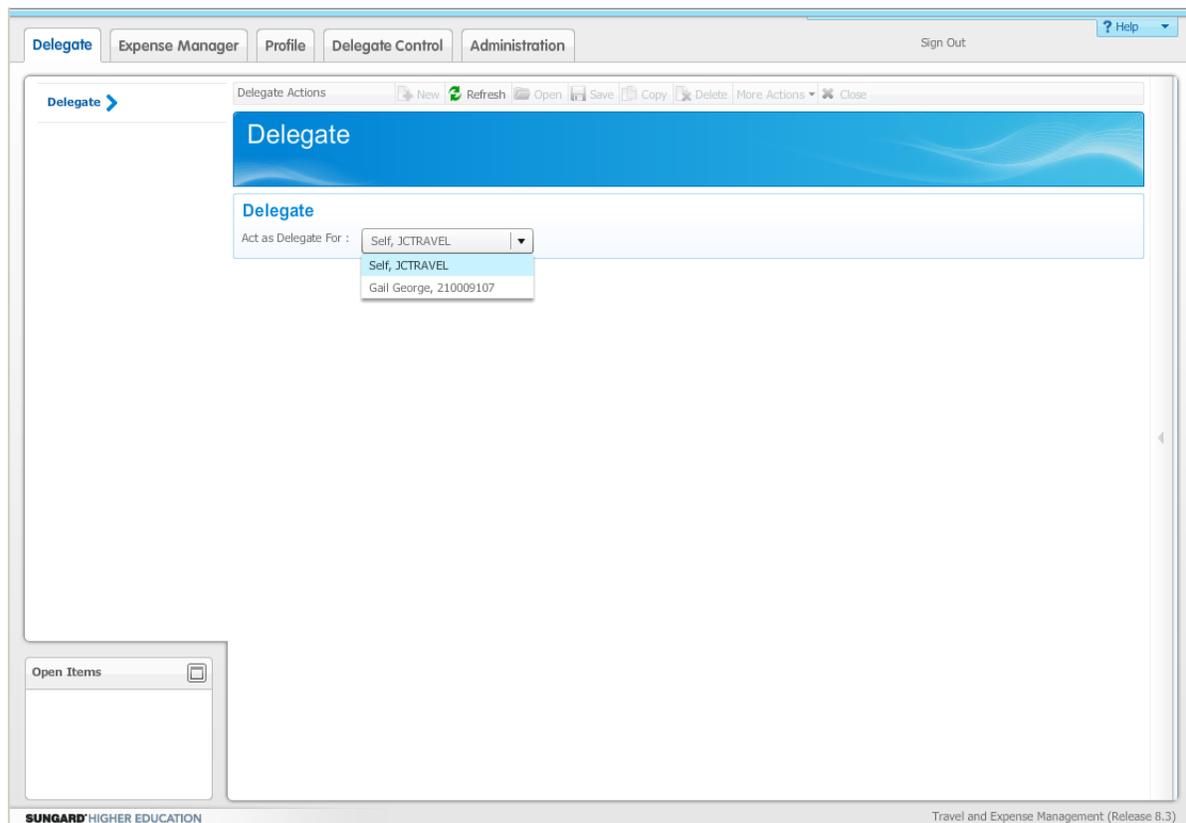
A delegate must be assigned both the Delegate and User roles in Banner Travel and Expense Management to view and access the **Delegate** tab. Likewise, a delegate administrator must be assigned the Delegate Administrator role to view and access the **Delegate Control** tab. Users without these roles 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.

The screenshot displays the SUNGARD HIGHER EDUCATION Expense Manager interface. The top navigation bar includes tabs for Delegate, Expense Manager (selected), Profile, Delegate Control, and Administration. A Sign Out button and a Help icon are also visible. The main content area is titled "Authorization Report List for Gail George" and features a search bar for "Search by Report Name" and an "Advanced Search" dropdown. Below the search bar is a table with the following columns: Report Name, Report ID, Report Date, Status, Status Date, Reimbursable, Non-Reimbursable, and Report Total. The table currently displays 0 rows. A "Generate Expense Report" button is located at the bottom right of the table area. The footer of the interface shows "SUNGARD HIGHER EDUCATION" on the left and "Travel and Expense Management (Release 8.3)" on the right.

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.

Authorization Report Actions New Refresh Open Save Copy Delete More Actions Close

XX - PA Bug Dec 08 Auth (TA000033 - Sent for Review)

Gail George (ID: 210009107)

**General Information**

Report Type: TR  
Purpose: Co  
Description: Co

**E-Mail Address**  
gail\_george@m

**Itinerary**

**Attachments**

**Comments**

Initiated By: Gail George (ID: 210009107)  
Sent to traveler by: Kathy Temper (ID:N00013595)  
Submitted by:

**Information**

Request document TA000033 forwarded by Kathy Temper for traveler review.

OK

Traveler Review Print View Related Documents

Travel and Expense Management (Release 8.2)

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**.

Report Name	Report ID	Report Date	Status	Status Date	Reimbursable	Non-Reimbursable	Report Total
XX - PA Bug Dec 0	TA000033	Jul 30, 2009	Pending Review	Jul 30, 2009	0.00	0.00	0.00

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.)