

Assigning a Delegate to Approve Invoices and Expenses

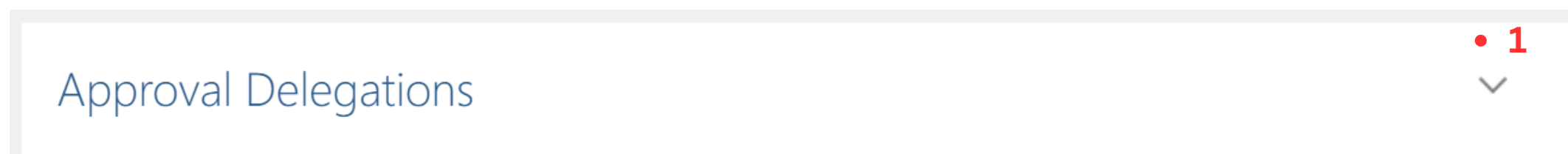
How to assign a delegate to approve invoices and/or expense reports on your behalf

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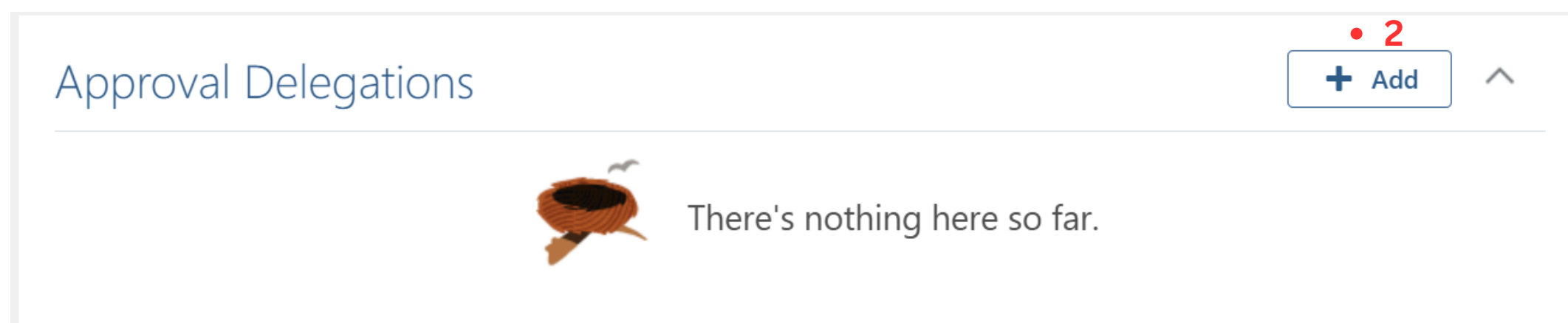
- **1** From the **Me** page find the **Roles and Delegations** icon



- **1** Click on **Roles and Delegations**



- **1** Scroll down to the bottom to find **Approval Delegations** and click on the down arrow to open more options



- **2** Click on **+ Add**

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There's

Approval Delegations

*Rule Name
Vacation Rule - Invoice Approvals • 3

*Start Date
03-Apr-2025 11:38 AM • 4

End Date
03-Sep-2025 11:38 AM • 5

Select a value
GlobalAbsenceApproval
Time and Labor
Journal Approval
Expense Report Approval
Purchasing Approval
Invoice Approval
PPR Approval

Invoice Approval • 6

*Delegate To
Select a value • 7

Allow this user to approve their own transaction

Save Cancel

Category

- 3 This is a free text field. You can enter any name you wish. In the example below, this is a vacation rule for **Invoice Approvals**.
- 4 Enter a start date
- 5 Enter an end date
- 6 Choose a start date from the drop down list
- 7 Begin by typing in the first name of the Delegate. A list will appear where you can choose the Delegate's name.

• 7 Allow this user to approve their own transaction

- 7 **DO NOT ALLOW THE USER TO APPROVE THEIR TRANSACTIONS.** This box should never be checked.

If you have any questions or need any assistance,
please contact Accounts Payable at:
ap@gmhec.org