EXPENSE REPORT: ACTING AS A DELEGATE

CAL POLY
Strategic Business Services
ADMINISTRATION & FINANCE
Acting as a Delegate

If you have been assigned to work as a delegate, your delegator will define which tasks you can complete, such as preparing reports, submitting reports, etc.

To work as a delegate:

1. Click Profile > Acting as other user.
2. Select the appropriate delegator's name.
3. Click Apply.
   
   **NOTE:** Notice that the Profile menu now displays Acting as and shows the name you just selected.
4. You are now officially working on behalf of that person. Complete the normal processes of creating reports, attaching receipts, etc.

To select a different user, follow the same steps but click a different name.
To return to your own tasks, click Acting as and then Done acting for others.

**NOTE:** Notice that the Profile menu now appears.