

# Delegates - Feature Overview

Last Modified on 12/01/2023 3:13 pm GMT

## Overview

Assure Expenses allows you to select delegate users to perform actions on your behalf. This can be used for a variety of reasons such as submitting expense claims through to delegating administrative permissions during periods of absence, for example, holidays or extended business trips.

There are two types of delegates which can be assigned within Assure Expenses:

- **Named Delegates** - Named delegates are individuals who have been specifically selected as a delegate by another claimant within the **My Details | Delegates** menu. This type of delegate can only logon as a delegate for the claimant(s) that have specifically set them as a delegate.
- **Users with the Delegate Logon Access Role element**- Users who have an **Access Role** which includes the **Delegate Logon** element can search for, and act as delegate for any user within your Assure Expenses system.

The screenshot shows the 'Tailoring General Options' page for 'Delegates'. The page has a sidebar with 'Page Options' including General Options, New Expenses, Email Options, Main Administrator, Regional Settings, and Password Settings. The main content area has tabs for General Details, Employees, Self Registration, Delegates, Declaration, Session Timeout, and Expedite. A yellow box contains text explaining Named Delegates and Access Role Delegates. Below this are sections for Delegate Options, Named Delegate Options, and Delegate Access Role Options, each with a table of settings and checkboxes.

Delegate Options	
Named and access role delegates can submit claims	<input checked="" type="checkbox"/> ?

Named Delegate Options	
Modify categories and system options	<input type="checkbox"/>
Check and pay expenses	<input checked="" type="checkbox"/>
Import corporate card statements	<input type="checkbox"/>
Export data and view export history	<input type="checkbox"/>
View claimant reports	<input type="checkbox"/>

Delegate Access Role Options	
Restrict users with the Delegate Logon element on their Access Role to the same options as named delegates	<input type="checkbox"/> ?

## Benefits

- **Efficiency in Absence** - Hand over duties to colleagues during out of office periods such as absence or business trips.

- **Task Designation** - Assign tasks to assistants or colleagues when dealing with high workloads.
- **Maintain Approver Process** - Set holidays within the system to enable delegates to receive approver emails.

## Features

Feature	Description
<b>Login as a delegate</b>	Login as a delegate and perform actions on behalf of other users
<b>Customise delegate access</b>	Restrict or provide delegate access privileges
<b>Specify a delegate</b>	Assign a specific employee as a delegate
<b>Holiday routed delegate approver emails</b>	Receive approver emails in place of delegator during periods of absence

## Implementation

### Administrators

1. In order to configure delegate options, administrators will require an Access Role with active permissions to Tailoring (General Options).
2. To configure delegate options, navigate from the **Home** page to **Administrative Settings | Tailoring | General Options** and click on the **Delegates** tab. For more information, view [General Options - Delegates](#).

### Claimants

1. Users will require the 'Delegate Logon' Access Role element to log in on behalf of other users within the system. For more information on configuring an Access Role, view [Manage Access Roles](#).
  2. To assign a named delegate and give a user access that doesn't have the 'Delegate Logon' Access Role element, navigate from the Home page to My Details. For more information, view [Assign a Named Delegate](#).
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