General Options - Delegates

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Permissions

You will require an Access Role with the following permissions:
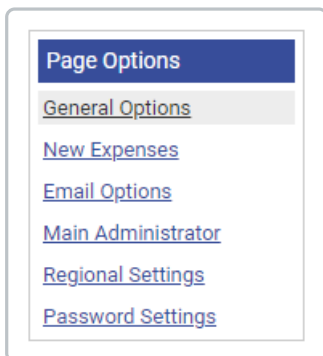
- (Tailoring) General Options

There are two types of delegate which can be configured within Assure Expenses -**Named Delegate** and **Access Role Delegates**.

- Named Delegates are users that have been selected as a delegate by another claimant within the My Details | Delegates menu, for example, if a claimant is on holiday, they may set a Named Delegate to act on heir behalf. For more information on how to assign a delegate, view Assign a Delegate.

- Access Role Delegates are users that have the 'Delegate logon element' selected within their access role, meaning they can search for any employee and act as their delegate. For more information on configuring access roles, view Manage Access Roles.

It is important to configure the specific permissions for both delegate types to ensure that the user is only able to access the information which is required to perform their delegate responsibility.

1. Navigate from the **Home** page to **Administrative Settings** | **Tailoring** | **General Options**.

2. From the General Options menu, click**Delegates**.

| General Details | Employees | Self Registration | **Delegates** | Declaration | Session Timeout | Expedite |

Named delegates are individuals who have been specifically selected as a delegate by another user within the My Details | Delegate menu. This type of delegate can only logon as a delegate for the user(s) that have specifically named them as a delegate.

Access Role Delegates are users who have an Access Role which includes the Delegate Logon element. They can search for and act as delegate for any user with in the product.

Delegate Options

| Named and access role delegates can submit claims | ☑ | ❓ |

Named Delegate Options

Modify categories and system options	☐	Modify employees, sign-off groups and roles	☑
Check and pay expenses	☑	Manage and approve advance requests	☐
Import corporate card statements	☐	Search and view the audit log	☐
Export data and view export history	☐	View administrator reports	☐
View claimant reports	☐		

Delegate Access Role Options

| Restrict users with the Delegate Logon element on their Access Role to the same options as named delegates | ☐ | ❓ |

Option	Description
Named and access role delegate can submit claims	This section applies to both delegate types as outlined above. Selecting this checkbox will allow both delegate types to submit claims for the users that they are acting as a delegate for.

Option	Description
Modify categories and system options	Select to give Named Delegate permission to User Defined Fields, Broadcast Messages, Colours, Company Details, Company Logo, Email Suffixes, Flags And Limits, General Options, Email Server, Main Administrator, Print Out, Regional Settings, Expense Items, Cost Codes, Countries, Currencies, Reasons, Project Codes, P11D, Departments, Vehicle Journey Rate Categories, Allowances, Expense Categories, Pool Cars, Default View, Default Print View, Emails, Company Details, Filter Rules, Envelope Management and Company Policy.
Modify employees, sign-off groups and roles	Select to give Named Delegate permission to Budget Holders, Employees, Access Roles, Signoff Groups, Teams, Vehicle Documents, General Options, Envelope Management, Item Roles.
Check and pay expenses	Select to give Named Delegate permission to Check and Pay.
Quick edit design	Select to give Named Delegate permission to Quick Entry Forms.

Option	Description
Manage and approve advance requests	Select to give Named Delegate permission to Advances.
Import corporate card statements	Select to give Named Delegate permission to Imports/Exports and Corporate Card Imports.
Search and view the audit log	Select to give Named Delegate permission to Audit Log.
Export data and view export history	Select to give Named Delegate permission to Financial Exports.
View administrator reports	Select to give Named Delegate permission to Administrator Reports.
View claimant reports	Select to give Named Delegate permission to Claimant Reports - Delegate will have access to reports where the report creator has defined that users can view the report for their own data.

Option	Description
Restrict users with the Delegate Logon element on their Access Role to the same options as named delegates	Select to restrict Access Role Delegate permissions to Named Delegate permissions when a user has both delegate settings active. Clear the checkbox to restore Access Role Delegate permissions, allowing the user to search any employee and act as their delegate with the same permissions as the employee.

> **Note:** Restrictions will prevent a delegate from accessing the Support Tickets menu or requesting a change of details for the user that they are logged in as. The Audit Logkeeps a record of the activity of the user when they are logged on as a delegate.
>
> Delegates cannot change the password of the user that they are logged in as.

3. Click **Save** to confirm or **Cancel** to discard any changes and return to the Tailoring page.