Add a Delegate

If you would like to provide another user access to your account so they can create reports on your behalf, such as an administrative assistant, you will need to add them as a delegate. Giving another user delegate access will allow them to access your Home Screen, Settings, and Inquiry reports, and enter Pre-Approvals and Expense Reports on their behalf.

To add a delegate, click on the User Icon with your name on the right side of the Navigation Bar and click Account Settings. Under Delegate Settings, click + Add New Delegates.

![Delegate Settings](image)

Begin typing the user’s name and it will appear in the dropdown menu. Click on his or her name to add them as a delegate. You may add as many delegates as you would like.

![My Delegates](image)
You may remove delegate access at any point by simply clicking the X next to the delegate’s name.