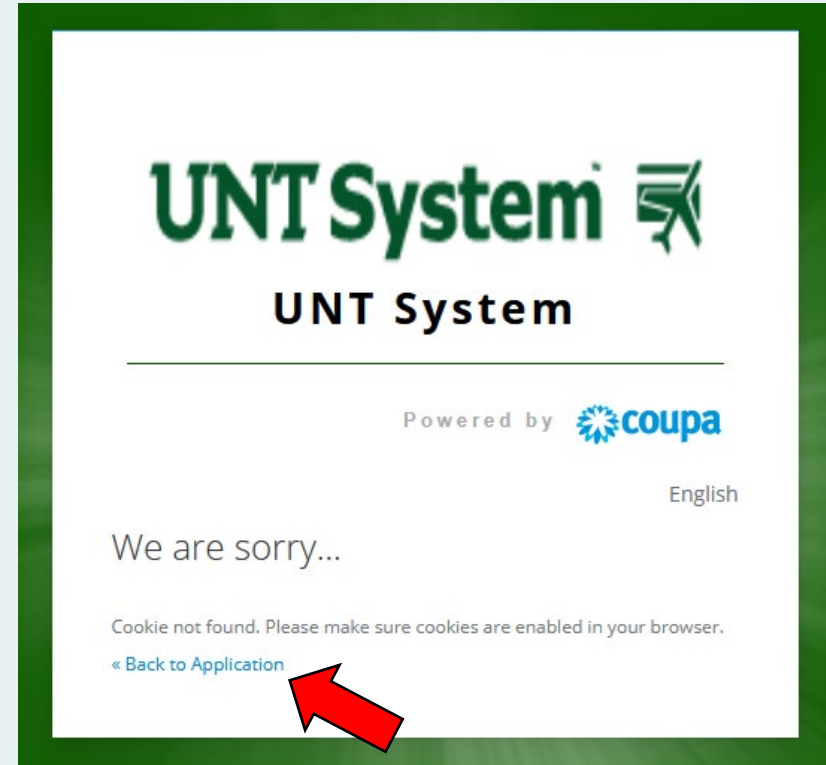


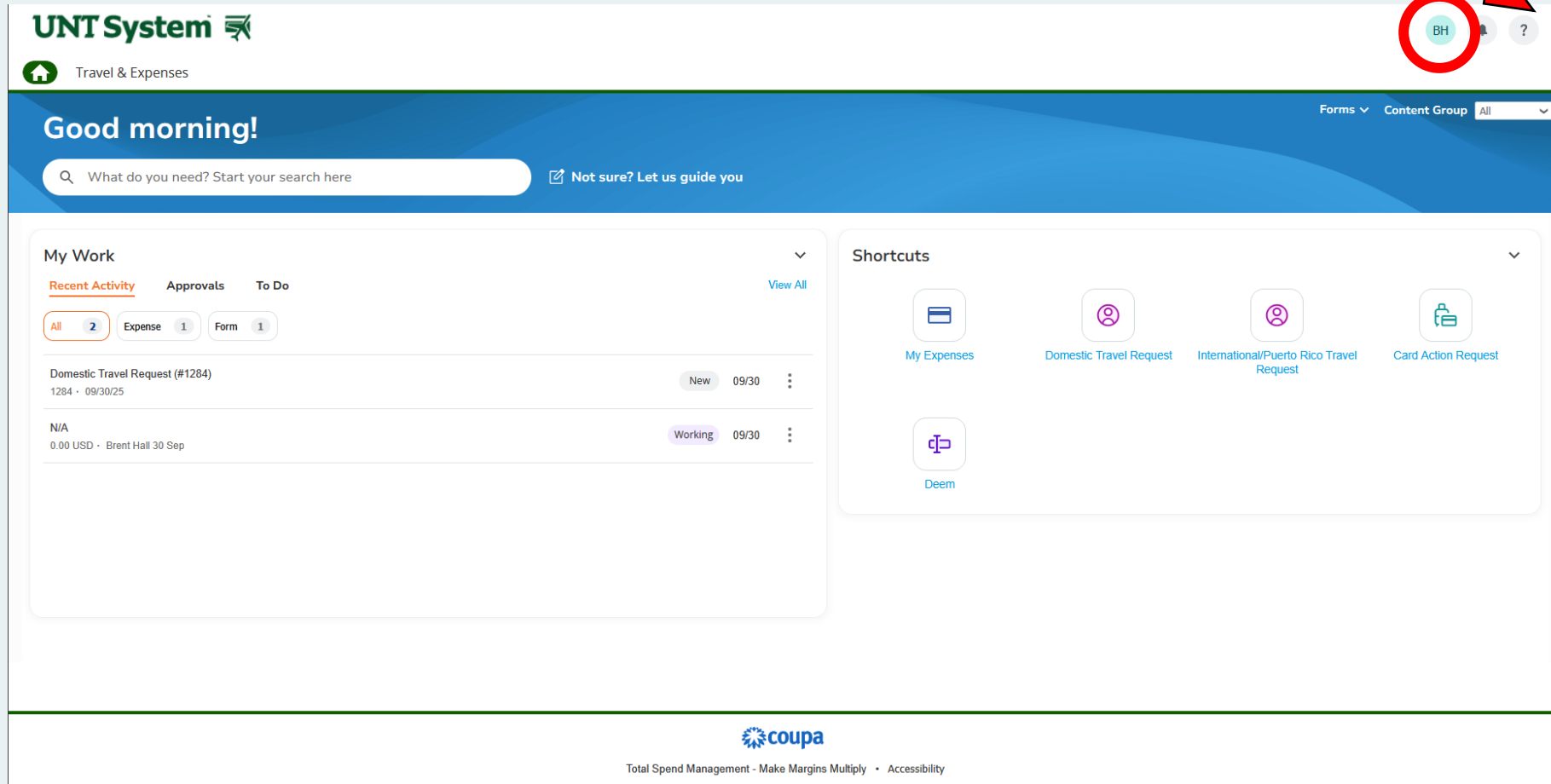
How to Add Delegates in Coupa

Click the link [here](#) to be routed to Coupa



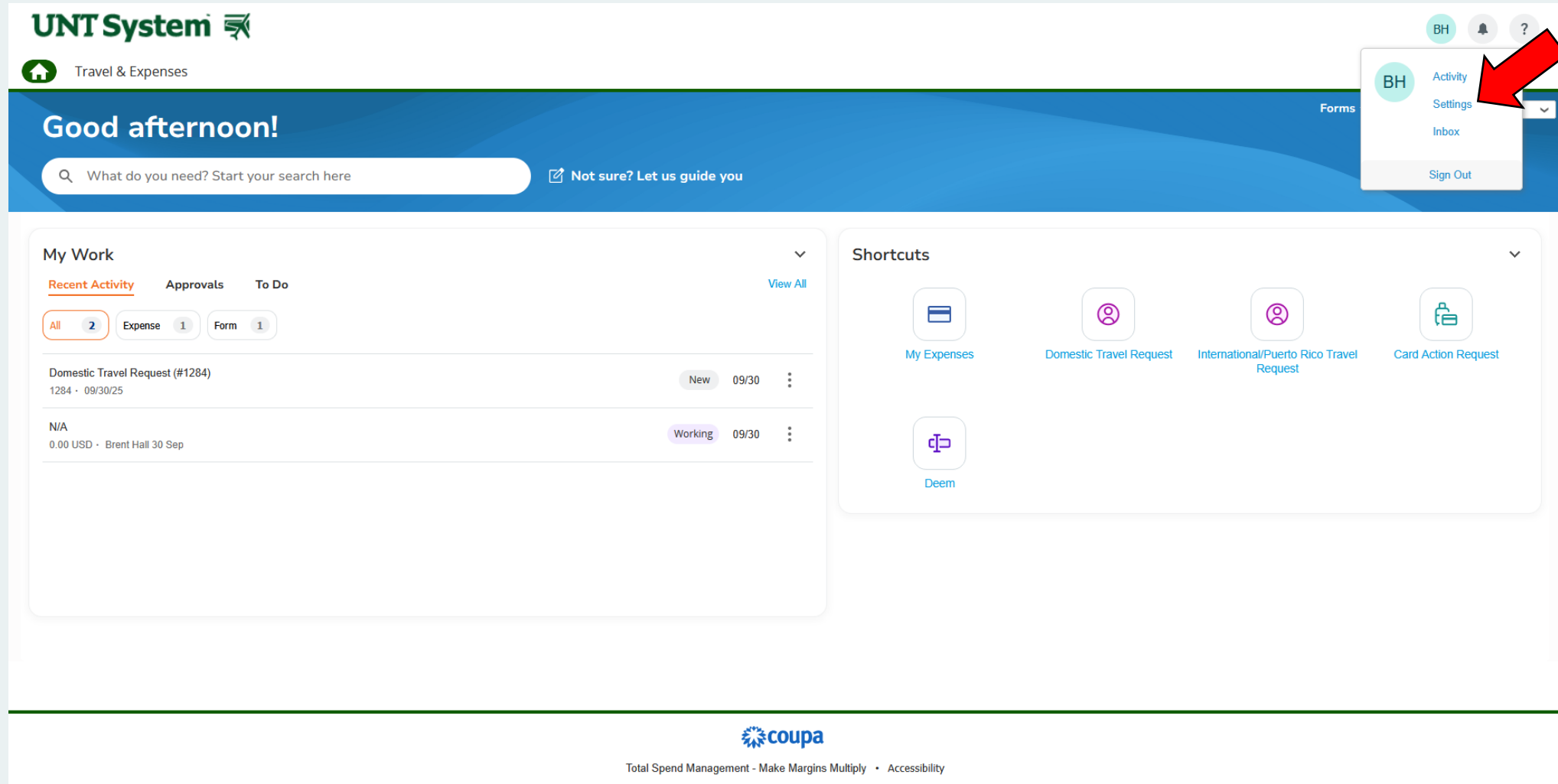
If the link leads you here, click "« Back to Application" to reach the Coupa home screen

Once on the home screen, click the icon for your profile (circle with your initials or profile picture) in the upper right-hand corner



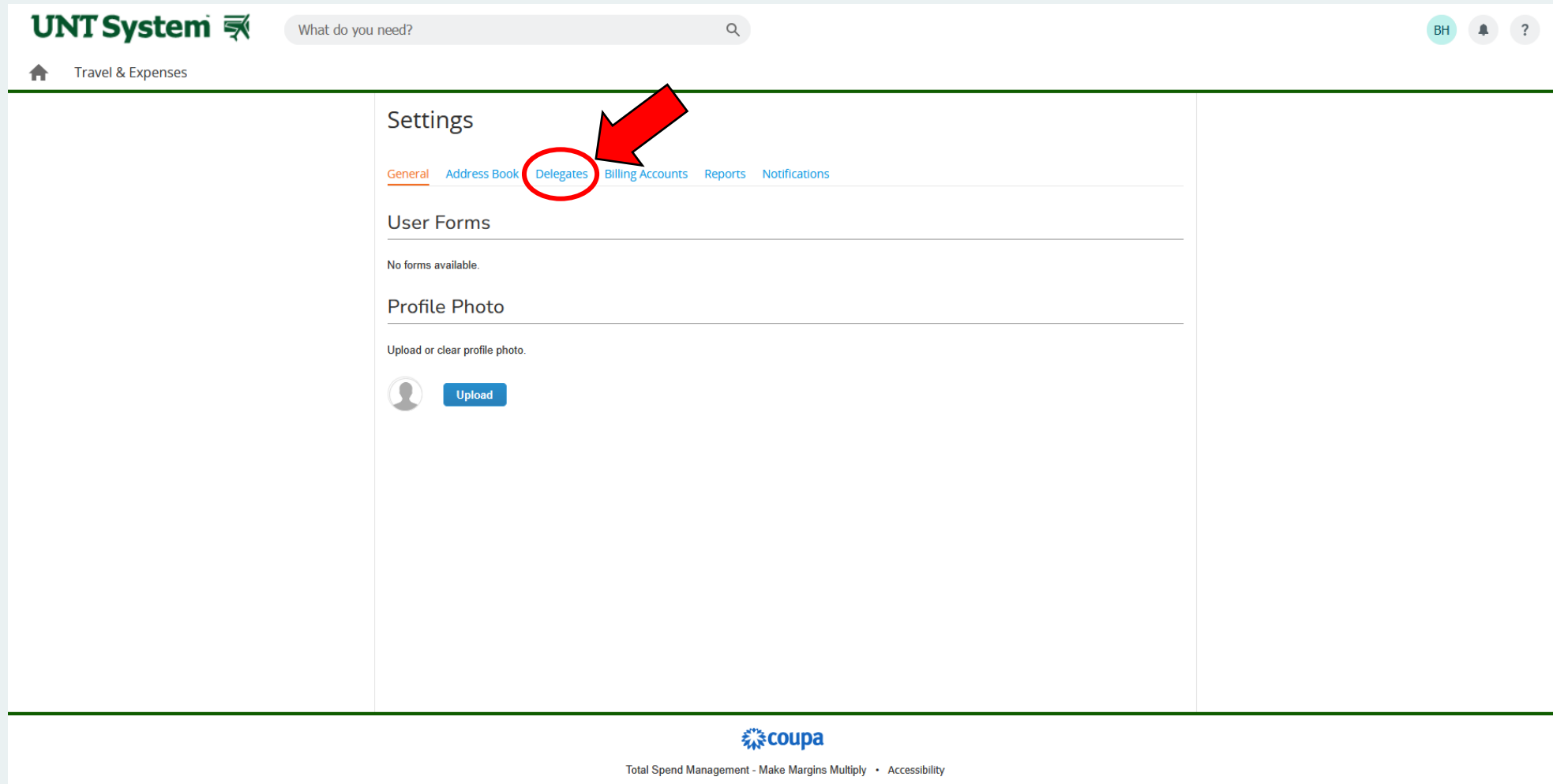
The screenshot shows the UNT System home screen. In the top right corner, there is a user profile icon consisting of a circle with the initials 'BH' inside. A red circle highlights this icon, and a red arrow points to it from the right. The page header includes the UNT System logo, a home icon, and the text 'Travel & Expenses'. Below the header is a blue banner with 'Good morning!' and a search bar. The main content area is divided into two columns: 'My Work' and 'Shortcuts'. The 'My Work' section shows a list of items with filters for 'All', 'Expense', and 'Form'. The 'Shortcuts' section contains icons for 'My Expenses', 'Domestic Travel Request', 'International/Puerto Rico Travel Request', and 'Card Action Request'. The footer features the Coupa logo and the text 'Total Spend Management - Make Margins Multiply • Accessibility'.

In the pop-up menu, click "Settings."



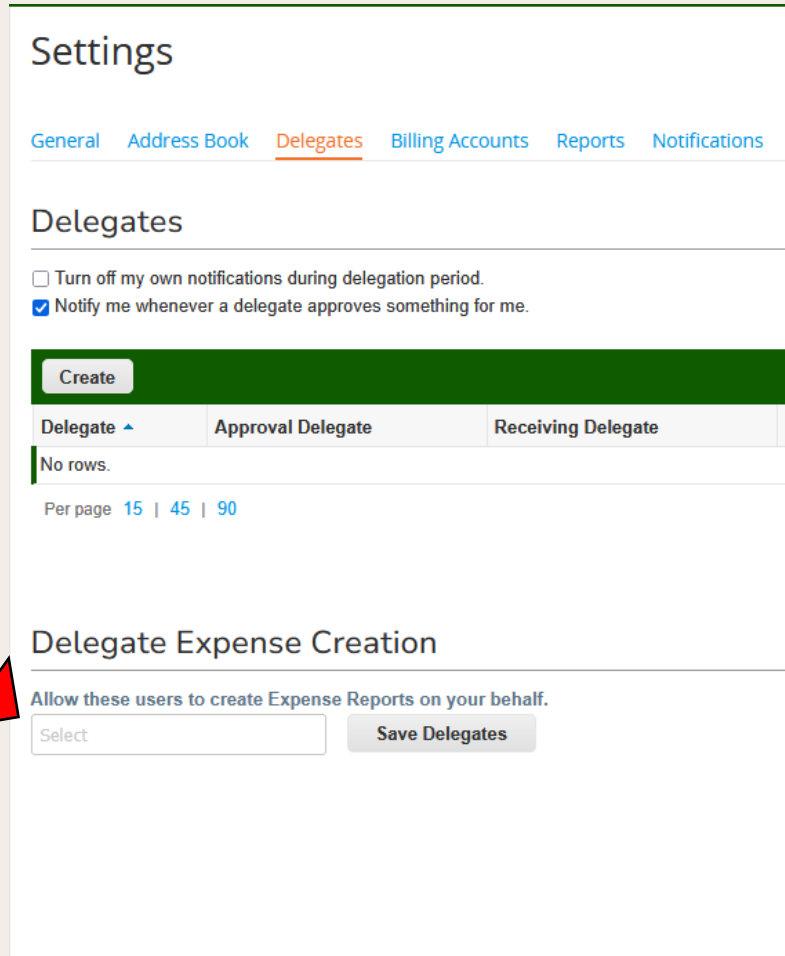
The screenshot displays the UNT System Coupa portal interface. At the top left, the logo for 'UNT System' is visible, followed by a home icon and the text 'Travel & Expenses'. A blue banner contains the greeting 'Good afternoon!' and a search bar with the placeholder text 'What do you need? Start your search here'. To the right of the search bar is a link that says 'Not sure? Let us guide you'. In the top right corner, there is a user profile section with a 'BH' icon, a notification bell, and a question mark. A dropdown menu is open, showing options: 'Activity', 'Settings', 'Inbox', and 'Sign Out'. A red arrow points to the 'Settings' option. Below the banner, the main content area is divided into two sections: 'My Work' and 'Shortcuts'. The 'My Work' section has tabs for 'Recent Activity', 'Approvals', and 'To Do'. Under 'Recent Activity', there are filters for 'All' (2), 'Expense' (1), and 'Form' (1). Two items are listed: 'Domestic Travel Request (#1284)' with a 'New' status and '09/30' date, and 'N/A' with a 'Working' status and '09/30' date. The 'Shortcuts' section contains four icons: 'My Expenses', 'Domestic Travel Request', 'International/Puerto Rico Travel Request', and 'Card Action Request', along with a 'Deem' icon.

On the settings page, directly below the word **“Settings”**, select the **“Delegates”** tab.



The screenshot shows the UNT System interface. At the top left is the UNT System logo. A search bar contains the text "What do you need?". On the top right, there are icons for a user profile (labeled "BH"), a notification bell, and a help question mark. Below the header, a breadcrumb trail shows "Travel & Expenses". The main content area is titled "Settings" and features a horizontal tab bar with the following options: "General", "Address Book", "Delegates", "Billing Accounts", "Reports", and "Notifications". The "Delegates" tab is circled in red, and a red arrow points to it from the right. Below the tabs, there are sections for "User Forms" (with the text "No forms available.") and "Profile Photo" (with the text "Upload or clear profile photo." and an "Upload" button). The footer contains the Coupa logo and the text "Total Spend Management - Make Margins Multiply • Accessibility".

1 Find the “Delegate Expense Creation” section where it says, “Allow these users to create Expense Reports on your behalf”



Settings

General Address Book **Delegates** Billing Accounts Reports Notifications

Delegates

Turn off my own notifications during delegation period.
 Notify me whenever a delegate approves something for me.

Create

Delegate	Approval Delegate	Receiving Delegate
No rows.		

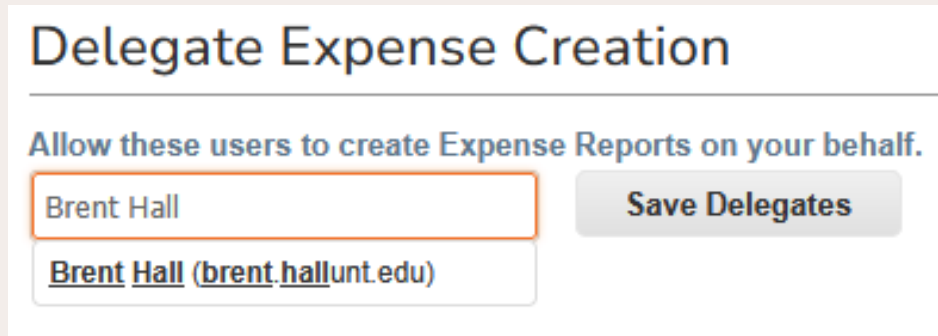
Per page 15 | 45 | 90

Delegate Expense Creation

Allow these users to create Expense Reports on your behalf.

Select Save Delegates

2 Enter the name of the person you want as your delegate and select them from the drop-down menu.



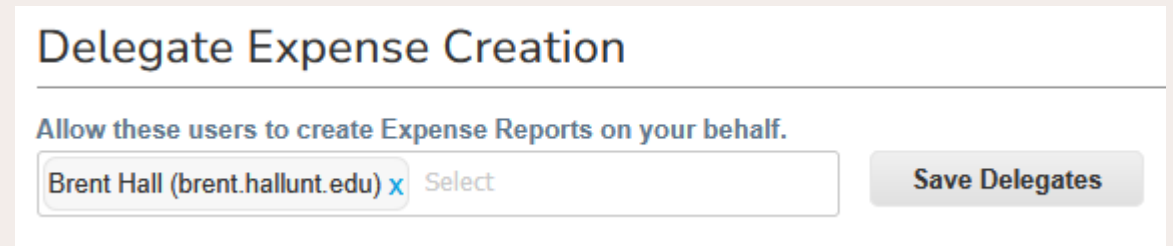
Delegate Expense Creation

Allow these users to create Expense Reports on your behalf.

Brent Hall Save Delegates

Brent Hall (brent.hallunt.edu)

3 Make sure to click the name in the dropdown menu!!! It will look like this if done correctly:



Delegate Expense Creation

Allow these users to create Expense Reports on your behalf.

Brent Hall (brent.hallunt.edu) x Select Save Delegates

**If there is no “Delegate Expense Creation” section, please make sure you have completed your Bridge training [here](#). If you have completed your bridge training and you still do not see the section, please notify Travel@untsystem.edu.*

Click “Save Delegates”

Delegate Expense Creation

Allow these users to create Expense Reports on your behalf.

Brent Hall (brent.hallunt.edu) x Select

Save Delegates

Finally, exit the Coupa app, and we should be all set!

Helpful Coupa Links

[UNT Travel](#)

[Coupa Resource Page](#)

[Coupa Login](#)

Coupa Contacts

CLASS-Travel@unt.edu

Travel@untsystem.edu