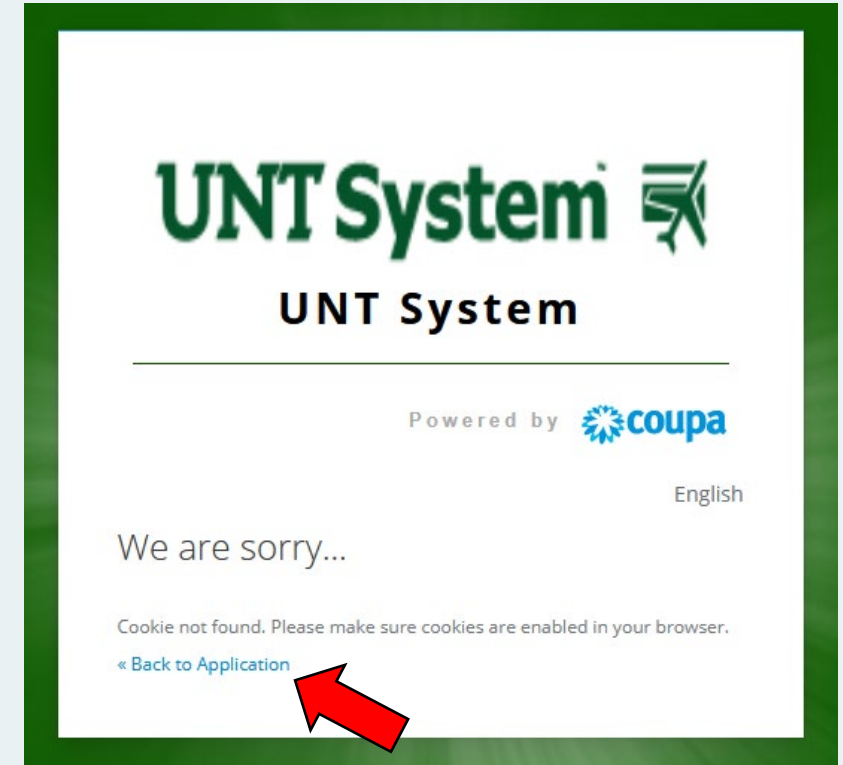


How to Add Delegates in Coupa as a UNT Employee

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

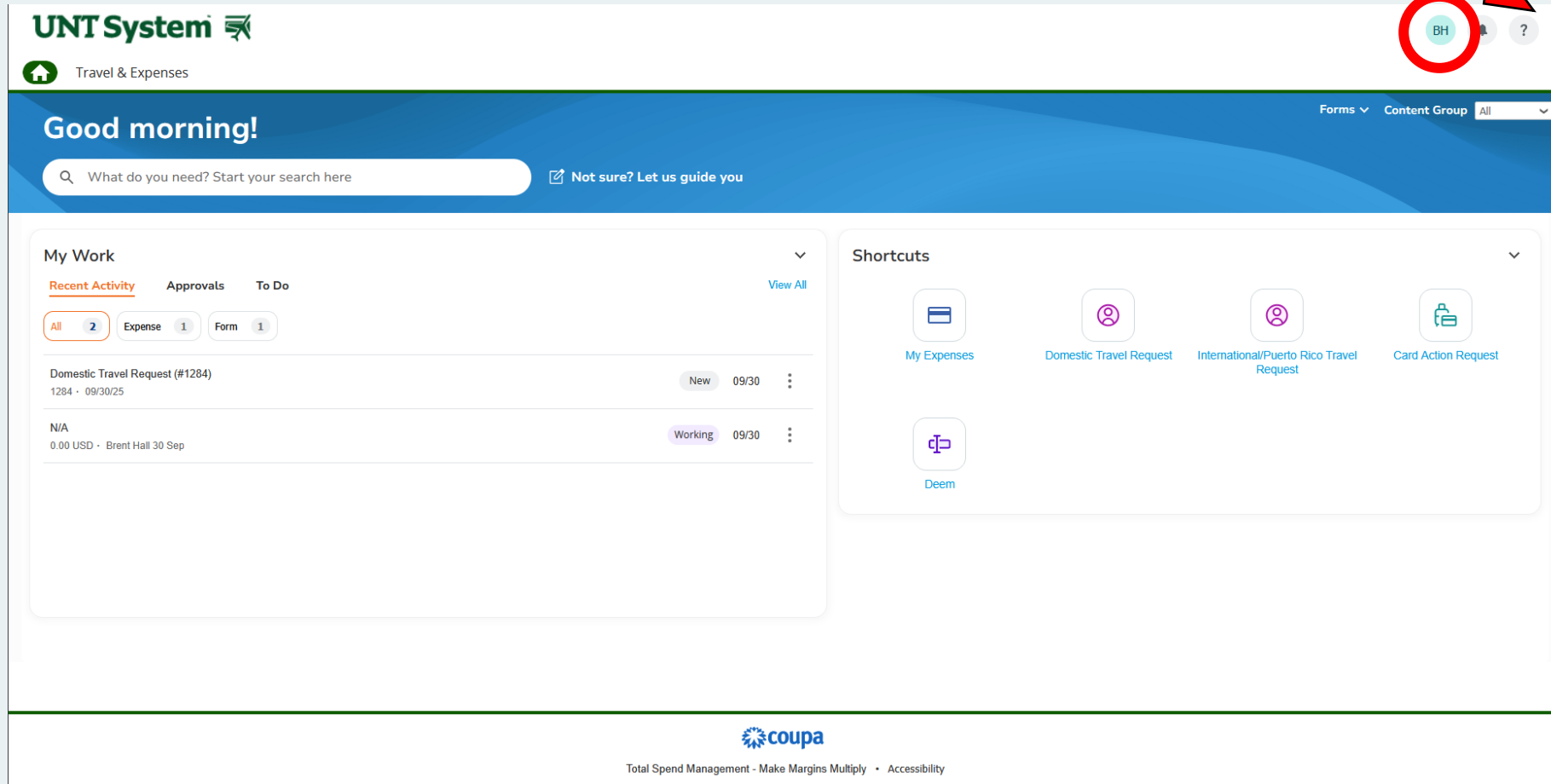


If the link leads you here, please complete the [Travel Training 2025](#) on Bridge and email Travel@untsystem.edu with the training certificate **and request a user license.*



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 Coupa home screen. In the top right corner, there is a user profile icon (a circle with the initials 'BH') which is circled in red. A red arrow points to this icon. The 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 sections: 'My Work' and 'Shortcuts'. The 'My Work' section shows a table of recent activity with columns for 'Recent Activity', 'Approvals', and 'To Do'. The 'Shortcuts' section contains icons for 'My Expenses', 'Domestic Travel Request', 'International/Puerto Rico Travel Request', 'Card Action Request', and 'Deem'. The footer includes the Coupa logo and the text 'Total Spend Management - Make Margins Multiply • Accessibility'.

UNT System

Travel & Expenses

Good morning!

What do you need? Start your search here

Not sure? Let us guide you

Forms Content Group All

My Work

Recent Activity Approvals To Do View All

All 2 Expense 1 Form 1

Domestic Travel Request (#1284)
1284 · 09/30/25 New 09/30

N/A
0.00 USD · Brent Hall 30 Sep Working 09/30

Shortcuts

My Expenses Domestic Travel Request International/Puerto Rico Travel Request Card Action Request Deem

coupa

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 'UNT System' logo is visible. Below it, a home icon and the text 'Travel & Expenses' are shown. A large 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 dropdown menu. The dropdown menu is open, showing options: 'Activity', 'Settings', 'Inbox', and 'Sign Out'. A red arrow points to the 'Settings' option. Below the banner, the 'My Work' section is visible, featuring 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. To the right of 'My Work' is a 'Shortcuts' section with four icons: 'My Expenses', 'Domestic Travel Request', 'International/Puerto Rico Travel Request', and 'Card Action Request'. At the bottom of the page, the Coupa logo is displayed, along with the text 'Total Spend Management - Make Margins Multiply • Accessibility'.

UNT System

Travel & Expenses

Good afternoon!

What do you need? Start your search here

Not sure? Let us guide you

Forms

BH

Activity

Settings

Inbox

Sign Out

My Work

Recent Activity Approvals To Do

All 2 Expense 1 Form 1

Domestic Travel Request (#1284)
1284 · 09/30/25

New 09/30

N/A
0.00 USD · Brent Hall 30 Sep

Working 09/30

Shortcuts

My Expenses

Domestic Travel Request

International/Puerto Rico Travel Request

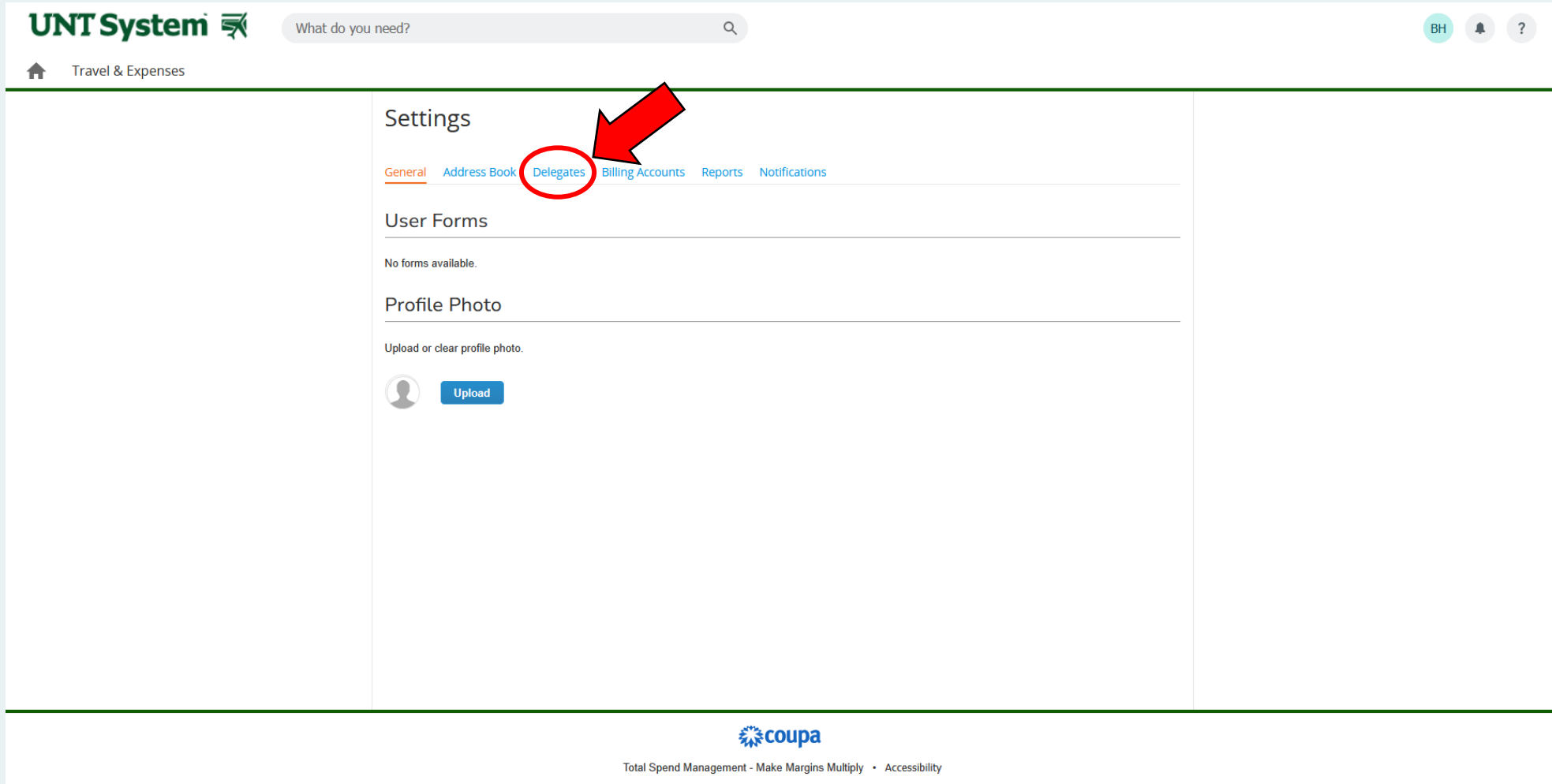
Card Action Request

Deem

coupa

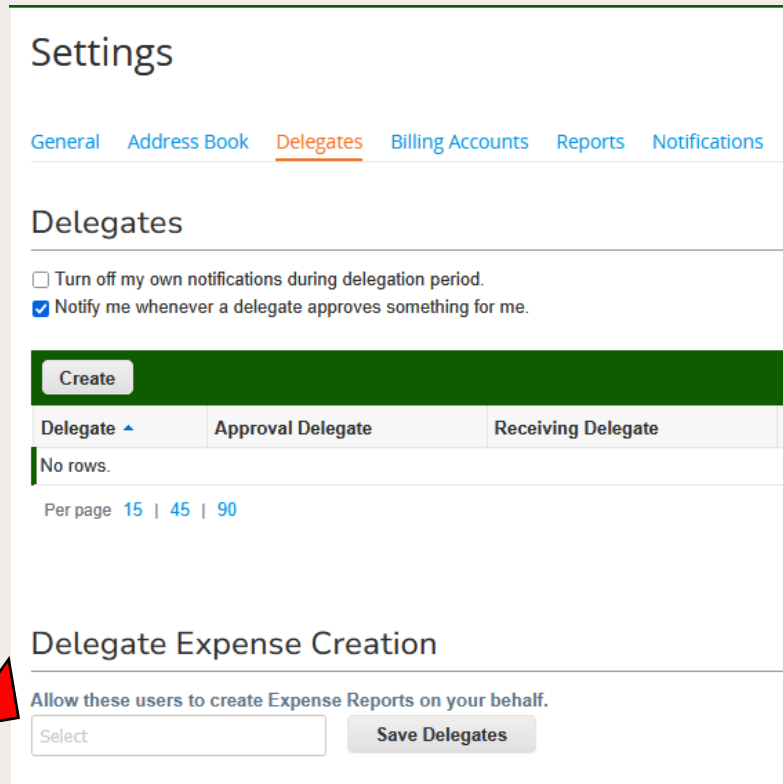
Total Spend Management - Make Margins Multiply • Accessibility

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



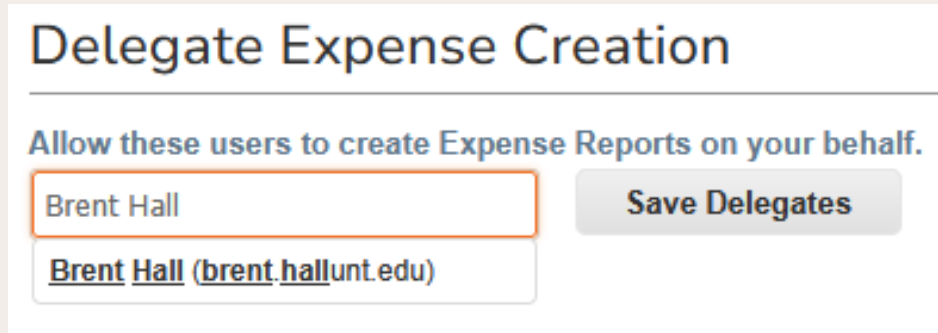
The screenshot shows the UNT System web interface. At the top left is the UNT System logo. Next to it is a search bar with the placeholder text "What do you need?". On the top right, there are three icons: a user profile icon labeled "BH", a notification bell, and a help/question mark icon. Below the header, there is a breadcrumb trail: a home icon followed by "Travel & Expenses". The main content area is titled "Settings". Below this title, there is a horizontal tab bar with five tabs: "General" (highlighted in orange), "Address Book", "Delegates" (circled in red with a red arrow pointing to it), "Billing Accounts", "Reports", and "Notifications". Below the tabs, there are three sections: "User Forms" with the text "No forms available.", "Profile Photo" with the text "Upload or clear profile photo.", and a profile picture placeholder icon next to an "Upload" button. At the bottom of the page, there is a footer with 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”



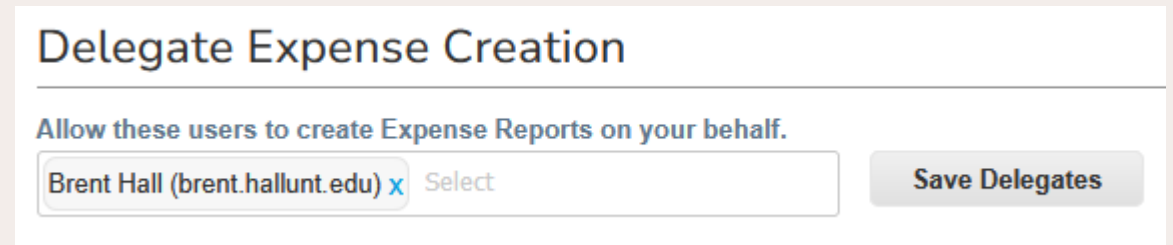
The screenshot shows the 'Settings' page with tabs for General, Address Book, Delegates, Billing Accounts, Reports, and Notifications. The 'Delegates' tab is active. Below the tabs, there are checkboxes for notification preferences. A green 'Create' button is visible. Below that is a table with columns 'Delegate', 'Approval Delegate', and 'Receiving Delegate', which is currently empty. At the bottom, the 'Delegate Expense Creation' section is highlighted with a red arrow. It contains a 'Select' dropdown menu and a 'Save Delegates' button.

- 2 Enter the name of the desired delegate(s) and select them from the dropdown menu.



The screenshot shows the 'Delegate Expense Creation' form. It has a title 'Delegate Expense Creation' and a subtitle 'Allow these users to create Expense Reports on your behalf.' Below the subtitle is a dropdown menu with 'Brent Hall' selected. To the right of the dropdown is a 'Save Delegates' button. Below the dropdown, the selected name 'Brent Hall (brent.hallunt.edu)' is displayed.

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



The screenshot shows the 'Delegate Expense Creation' form. It has a title 'Delegate Expense Creation' and a subtitle 'Allow these users to create Expense Reports on your behalf.' Below the subtitle is a dropdown menu with 'Brent Hall (brent.hallunt.edu)' selected. To the right of the dropdown is a 'Save Delegates' button. Below the dropdown, the selected name 'Brent Hall (brent.hallunt.edu)' is displayed next to a small 'x' icon.

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!