Expenses - Manage Delegates and Permissions

In this topic you will learn how to delegate permission to someone else to create Expense reports. This process must be initiated by the person who wants another staff member to enter and manage expense reports on their behalf. Once the permission is granted, the person it has been delegated to will see the delegator's name in a pull-down menu on the Travel and Expenses page.

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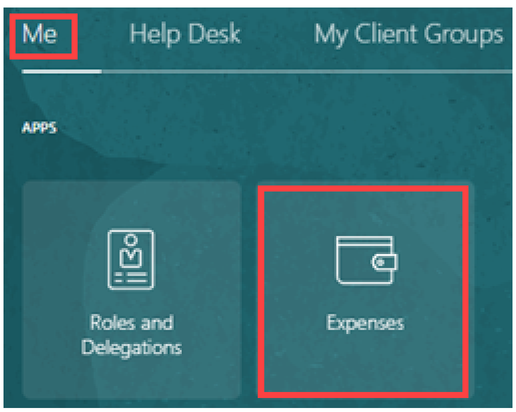
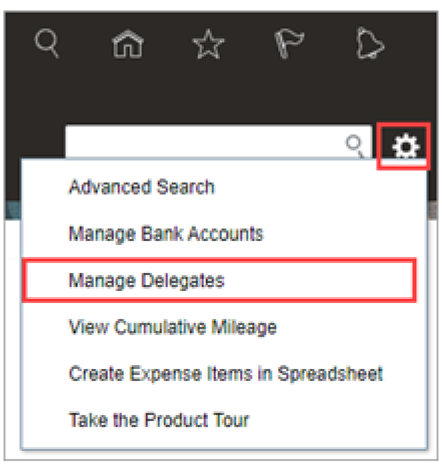
Directions

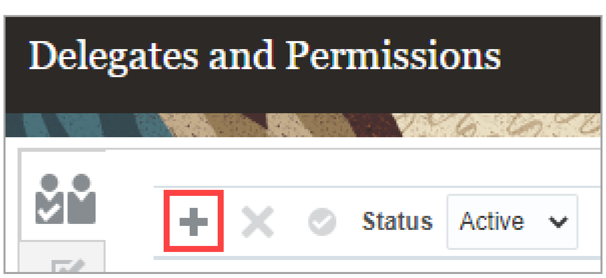
1. Scroll to the **Me** menu and select the **Expenses** tile.



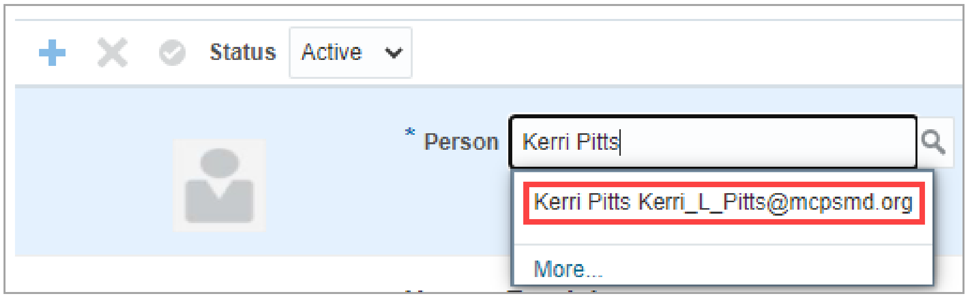
2. Click on the **Go to Task** gear icon and select **Manage Delegates** from the drop-down list.



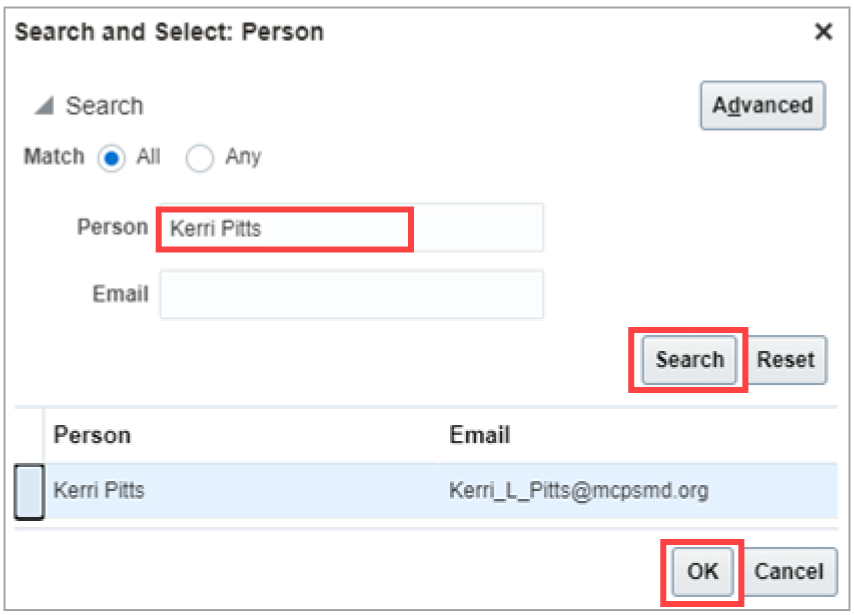
3. Click on the **+** icon to add a delegate.



4. Type in the name of the person (*Firstname Lastname*) you will delegate to and select from the drop-down list.



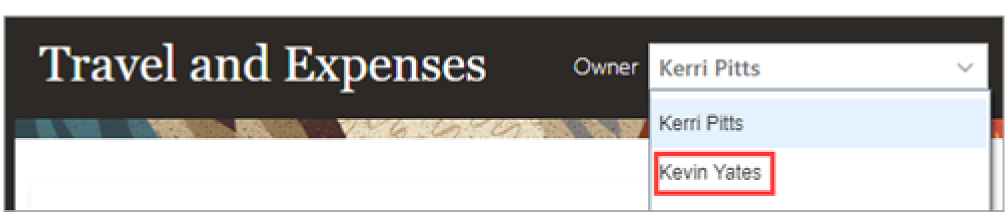
Alternatively, you can search by clicking on the Search icon to bring up a search window for a more advanced search.



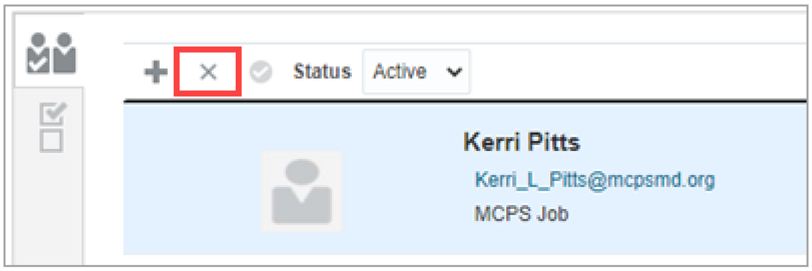
Note: *When conducting a search, you will need to capitalize the first letter in the first and last name as shown in this example.*

5. Click on the **Save and Close** button in the upper right of the screen to complete the delegation.

Note: *When the person to whom you've delegated logs in, they will now see a new* ***Owner*** *menu at the top of the Travel and Expenses screen with your name to select as the owner of Expense Reports to be created.*



6. If you would like to remove a delegation once it has been assigned, you will need to repeat Steps 1 and 2 above. Then on the Delegates and Permissions screen, select the name of the person with the delegation and click on the **Inactivate** button.



7. A pop-up window will appear. Select **Yes** to confirm that you are inactivating the delegation.

Note: *There will now be a beginning and ending validation date next to the delegate's name. It may take up to 24 hours for the delegation to be updated and removed from the Delegates and Permissions screen. When the person who had the rights logs in the following day, they will no longer see the* ***Owner*** *menu on the Travel and Expenses screen.*

8. Click on the **Save and Close** button in the upper right of the screen to complete the inactivation of the delegation.