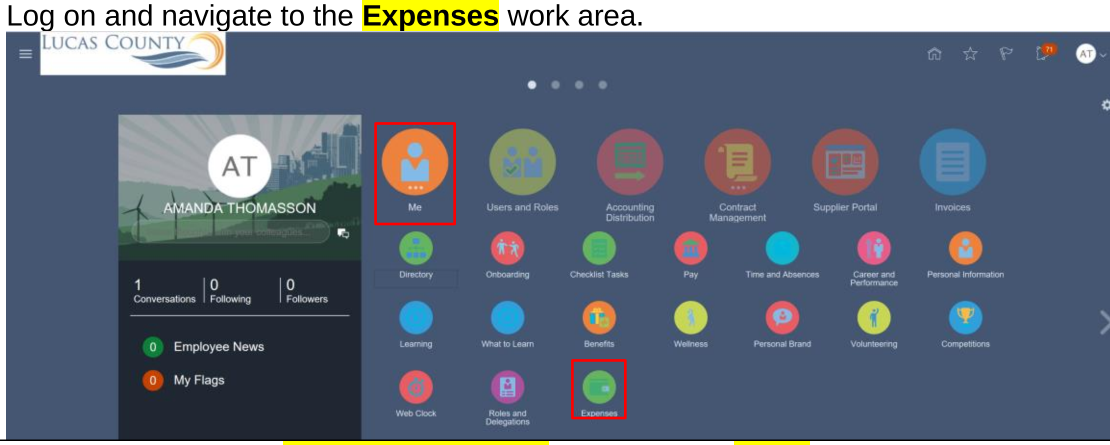
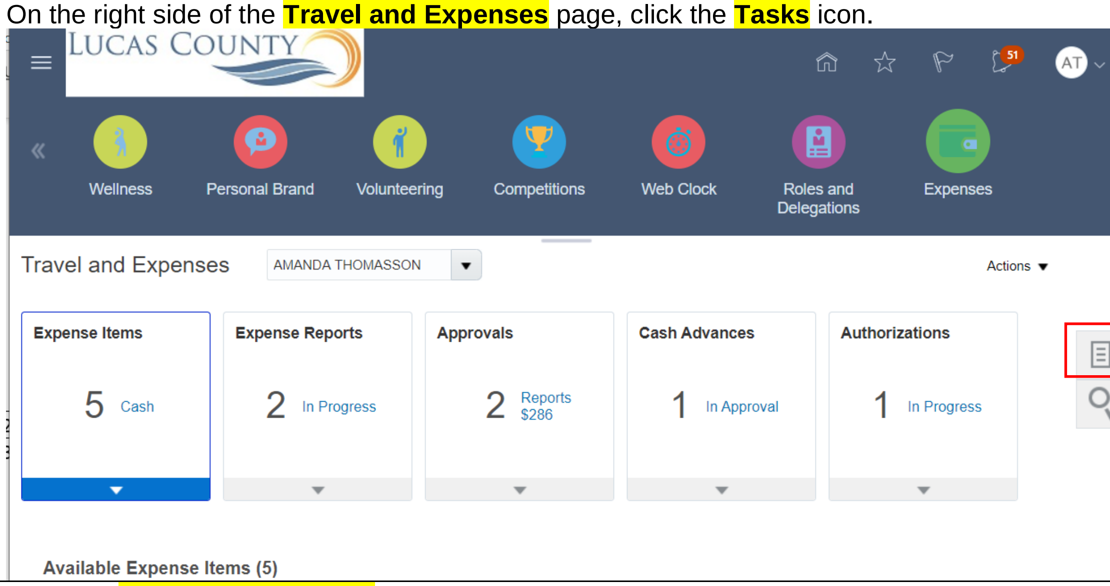
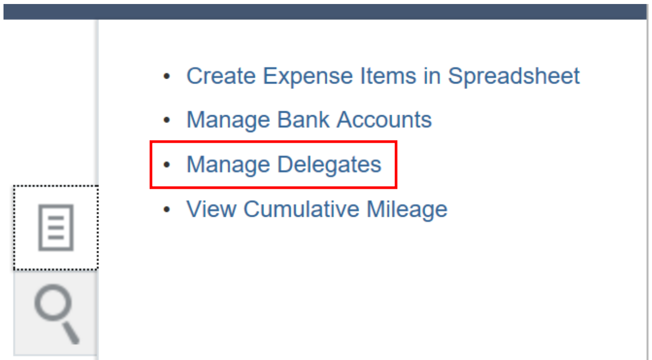
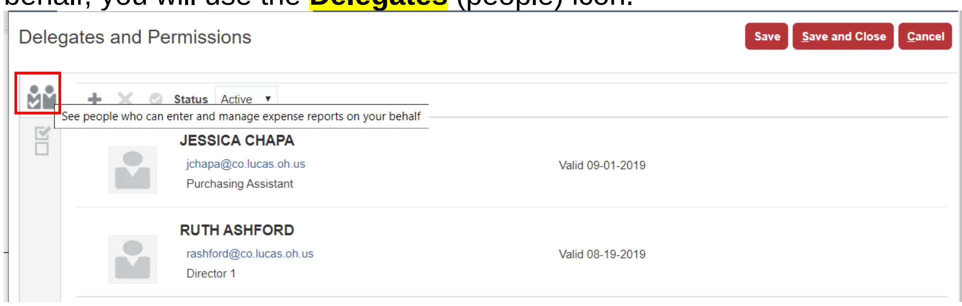
Manage Delegates

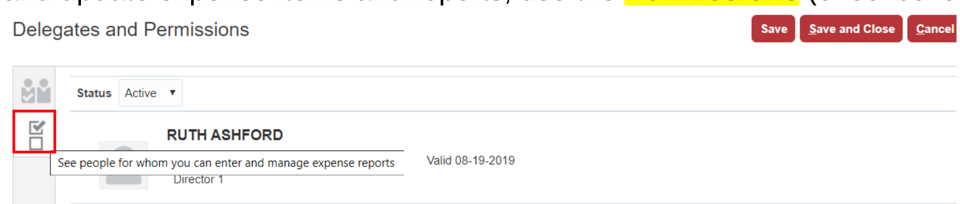
Audience: Employee

Purpose: Delegates are other employees, normally a person who can act on behalf of the traveler or PCARD user reviewing information and creating and submitting expense reports. This job aid will assist you with setting up other users to be able to view, create and update expense items and reports on your behalf.

Step	Action
1	Log on and navigate to the **Expenses** work area. 
2	On the right side of the **Travel and Expenses** page, click the **Tasks** icon. 
3	Click on **Manage Delegates** menu item.

<table>
<tr><td></td><td>

First time users will need to click the Travel and Expenses link at the bottom of the Expenses start up page.</td></tr>
<tr><td>4</td><td>To assign someone who is eligible to enter and manage expense reports on your behalf, you will use the Delegates (people) icon.


To see who has currently given you permission to act on their behalf to view, create and update expense items and reports, use the Permissions (checkboxes) icon.

</td></tr>
<tr><td>5</td><td>To Delegate another person to view, create and update expense items and reports, click the Delegates icon.
Then click the ‘+’ icon to add a delegate (the person who can act for you).

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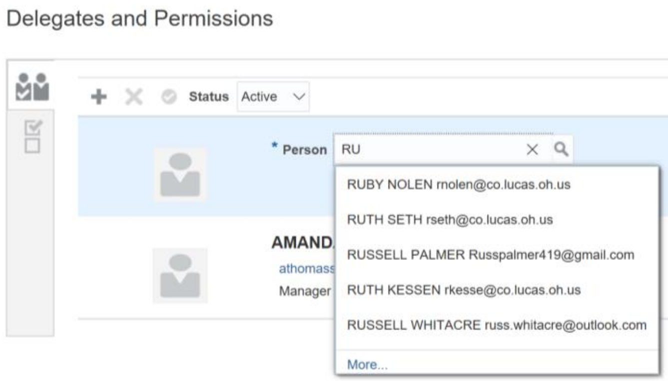
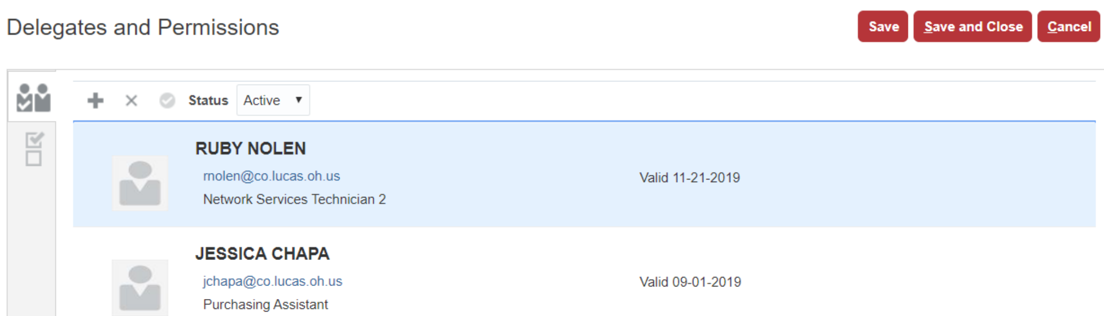
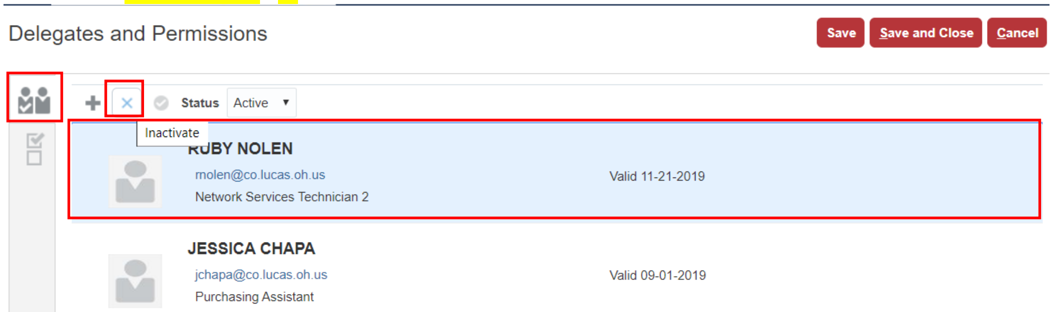
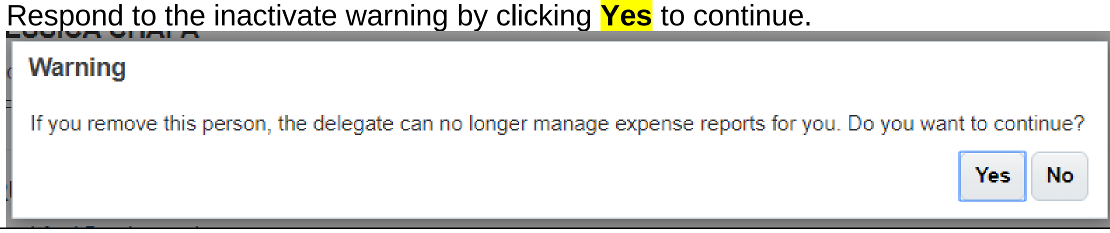
<tr><td>6</td><td>In the Person field, you will enter a person’s name (first and last name in capital letters).</td></tr>
</table>

	 Start entering the first name and pick from the results or use the **Search** capability.
7	Select the individual name from the list and click **OK** to add the person's name.
8	Click **Save** to save the delegation and remain on the screen or **Save and Close** to complete the activity and return to the Travel and Expenses, Expense Items Info Tile.  Alternatively, you can click **Cancel** to cancel the activity.
9	**To inactivate a delegate:** From the **Tasks** list, navigate back to **Manage Delegates**. With the Delegates icon selected, click on the delegate to inactivate. Click the **Inactivate** "**X**" icon.  Respond to the inactivate warning by clicking **Yes** to continue. 

	Click the **Save and Close** button.