

# Expenses: Managing Expense Report Delegates

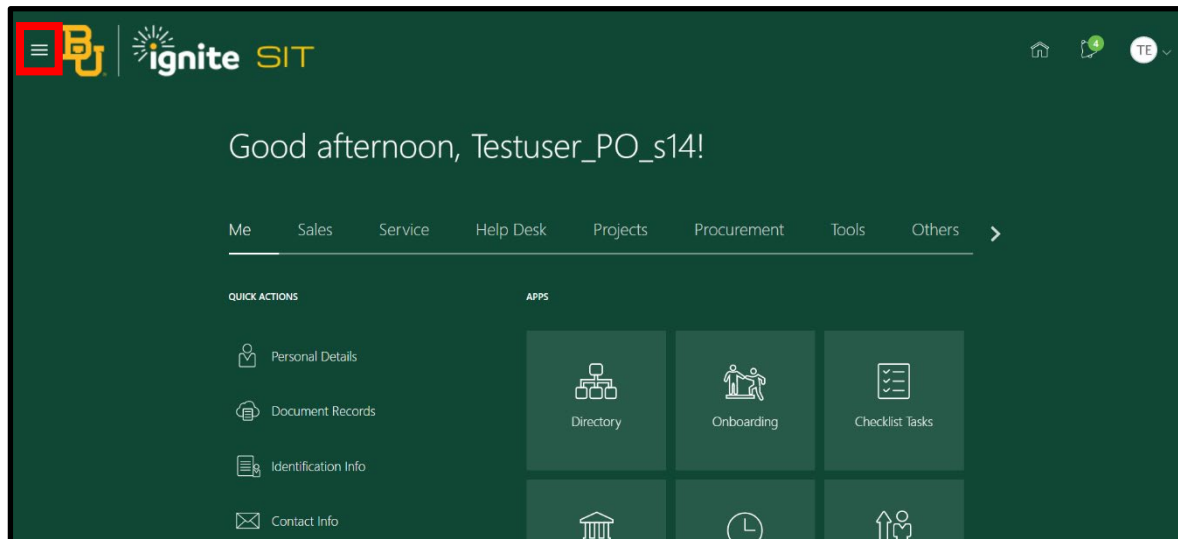
## Overview

- This guide documents the process to set up Expense module delegates.
  - These delegates can enter expense reports for another employee.
  - The employee is still responsible for all expense report details, even when submitted by their delegate.
- For more information on the different Delegations available in Ignite, see the ***Delegation Type Fact Sheet***.

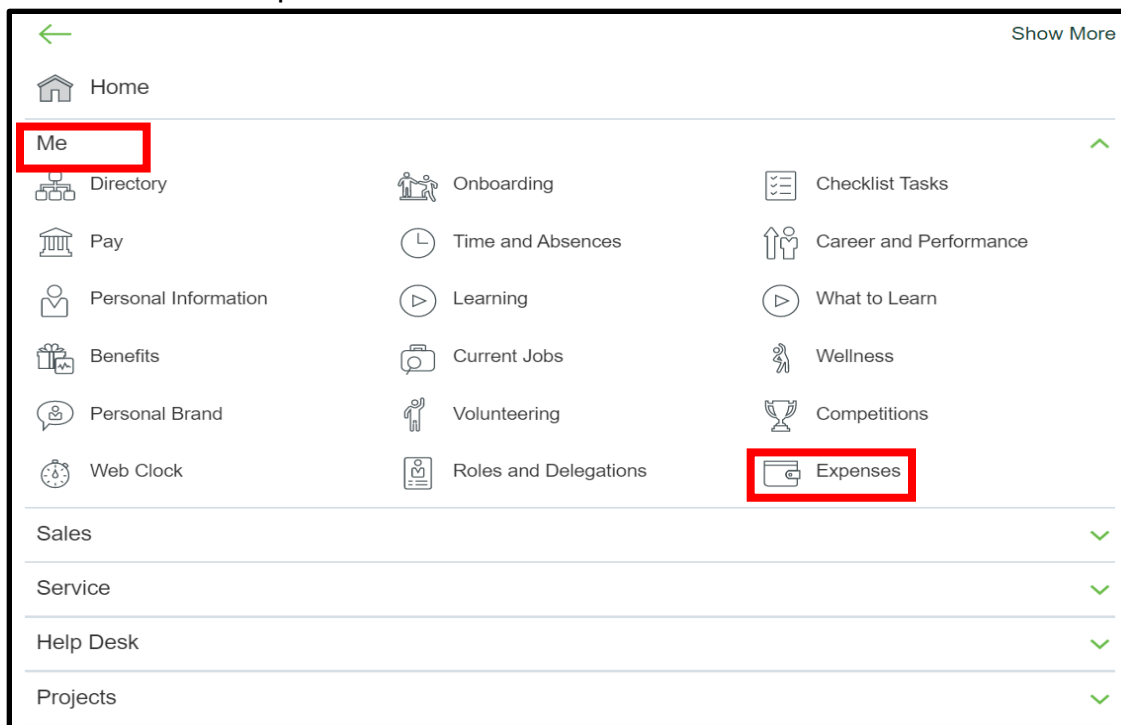
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## I. Navigating to the Self Service Module

- I. You can access the **Expenses** section in two ways:
  - a. Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.



- b. Under the **Me** section, click the drop down arrow, and select **Expenses** from the drop down list.



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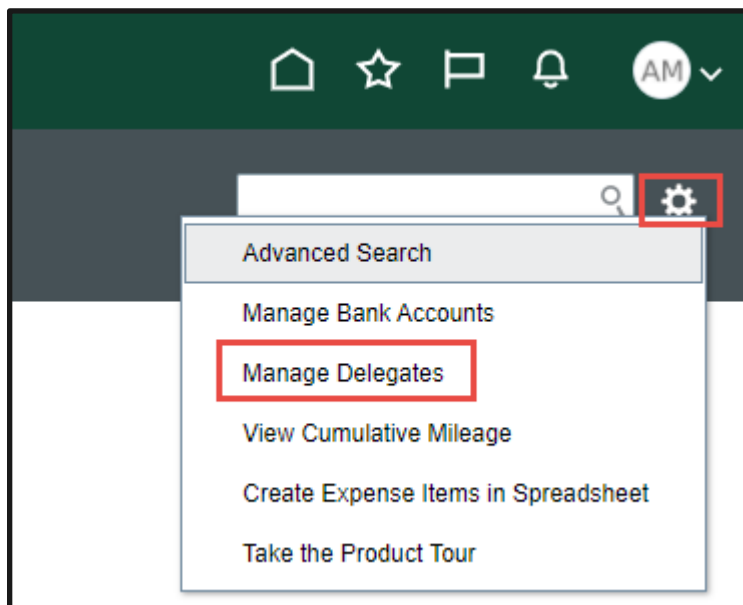
- c. (Option 2) Under the **Me** heading on the home page, you can scroll down and click on the **Expenses** tile on the Main Page.

The screenshot displays the Ignite BPT home page. At the top left, there is a logo for 'ignite BPT' and a greeting 'Good afternoon, Smith!'. Below the greeting is a navigation bar with several tabs: 'Me', 'My Team', 'My Client Groups', 'Benefits Administration', 'Sales', 'Service', 'Help Desk', and 'Contract Management'. The 'Me' tab is highlighted with a red box. Below the navigation bar, there are two columns of tiles. The left column is titled 'QUICK ACTIONS' and contains various personal and organizational information tiles. The right column is titled 'APPS' and contains various functional tiles. The 'Expenses' tile, located in the bottom row of the 'APPS' column, is highlighted with a red box. The 'Expenses' tile features an icon of a wallet with a dollar sign and the text 'Expenses' below it.

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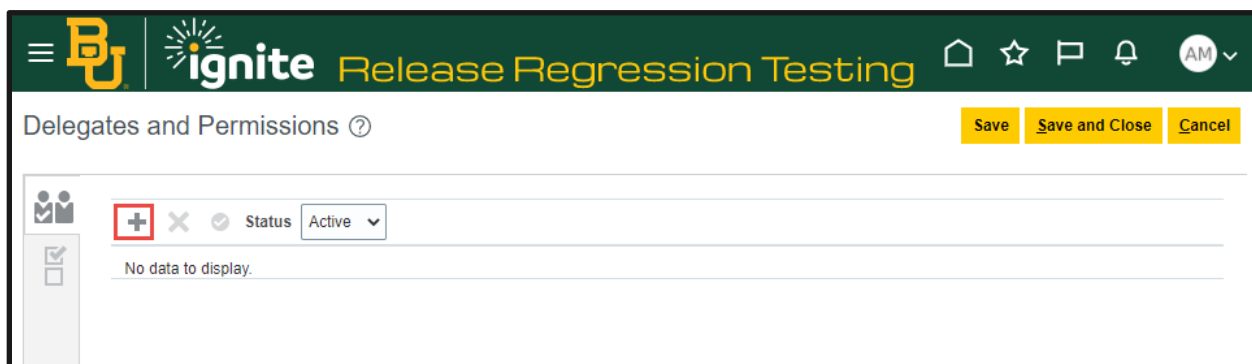
## 2. Manage Delegates

1. Upon entering the **Expenses** work area, click the **gear icon** to the far right of the window. Then click **Manage Delegates**.



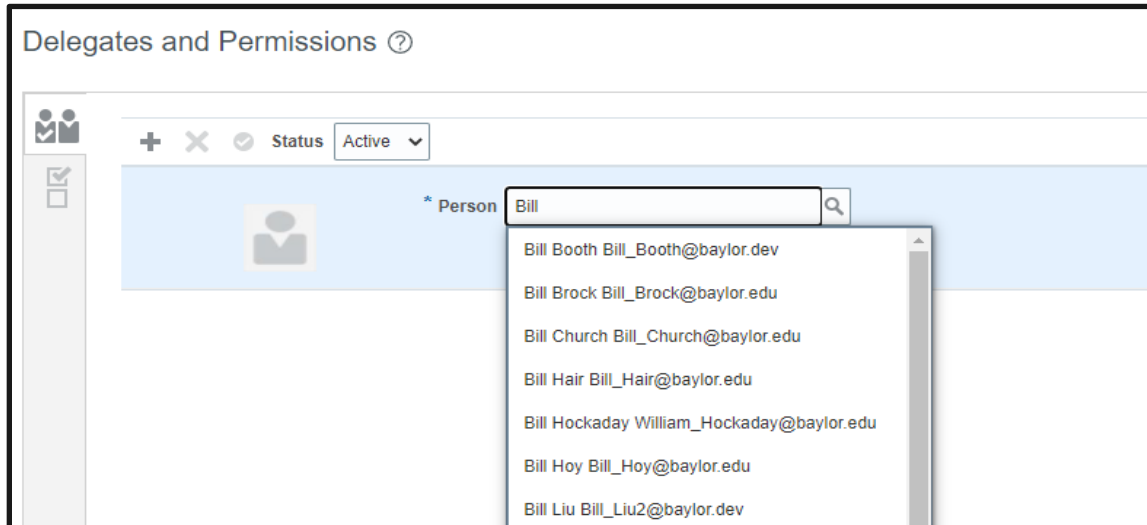
- i. \*Note: The Expense Module allows you to delegate expense report entry to another person. However, you are still the owner of the expense report.

2. Click on the **“+”** Create Icon in the top left of the window.



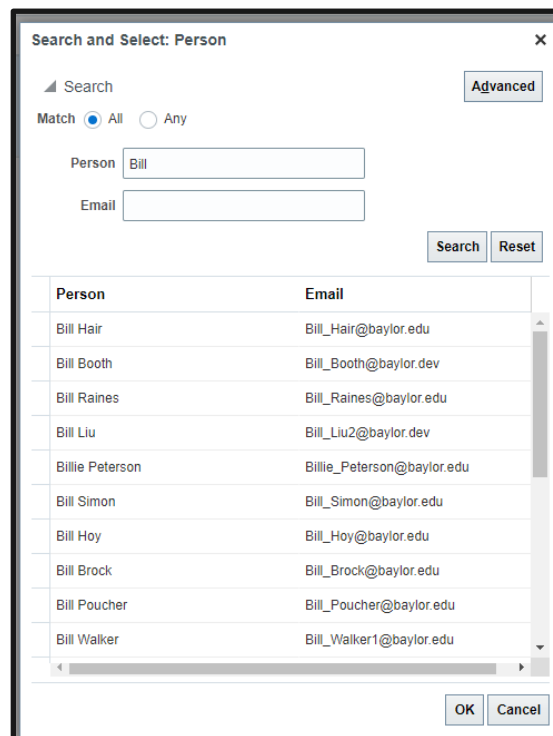
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3. In the **Person** field, enter the name of who you want to delegate. If the name does not appear, use the Search icon.



- a. When you search, do so by first name.

**Note:** Fields are case sensitive, capitalize the first letter and enter the rest of the name in lower case.



4. Select the delegate from the list and click **OK**.

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5. Click **Save and Close**.

6. To **Remove a delegate**:

- a. Open the **Manage Delegations** screen once more.
- b. Click the delegate row to select (the row will be highlighted blue).
- c. Click the **X** icon.
- d. Click **Save and Close**.

