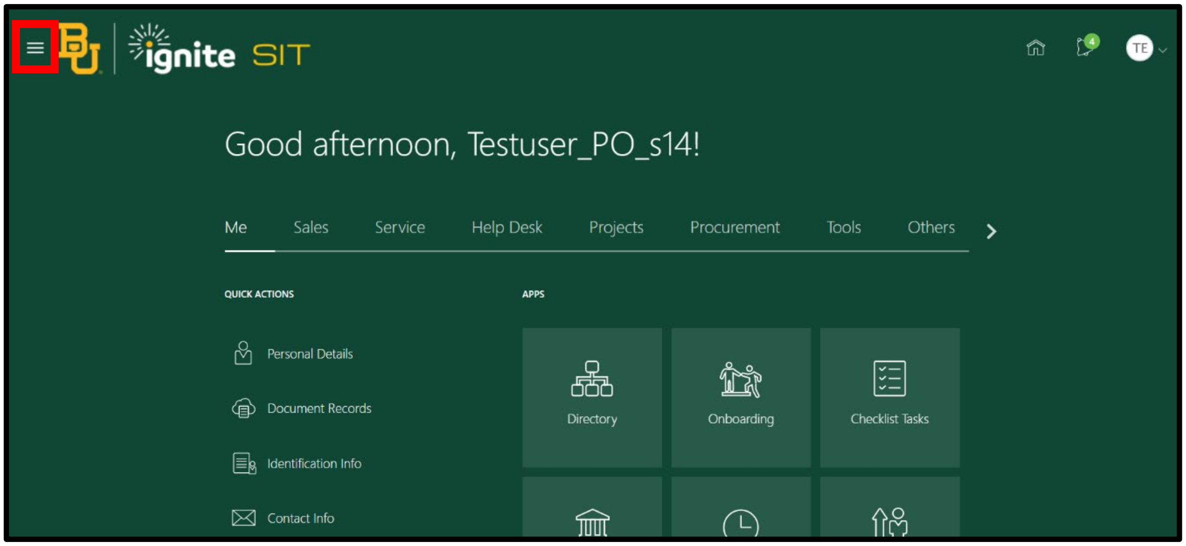
Expenses: Managing Expense Report Delegates

Overview

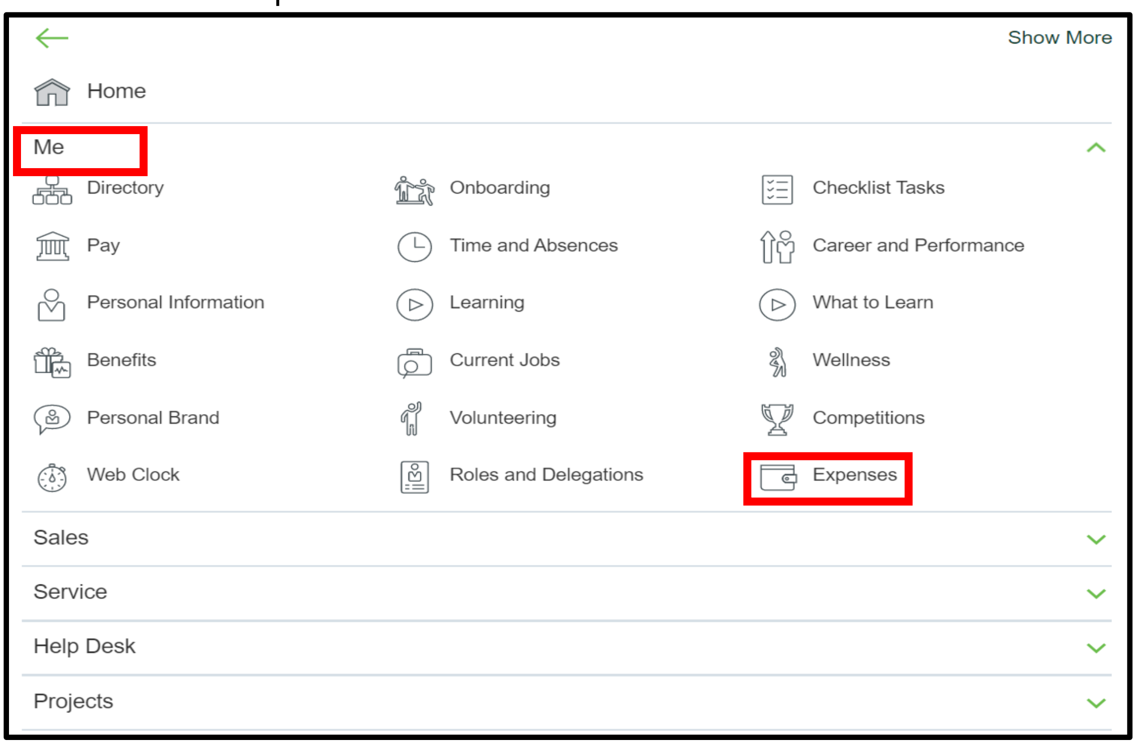
- This guide documents the process to set up Expense module delegates.
    - These delegates can enter expense reports for another employee.
    - The employee is still responsible for all expense report details, even when submitted by their delegate.
- For more information on the different Delegations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

1. Navigating to the Self Service Module

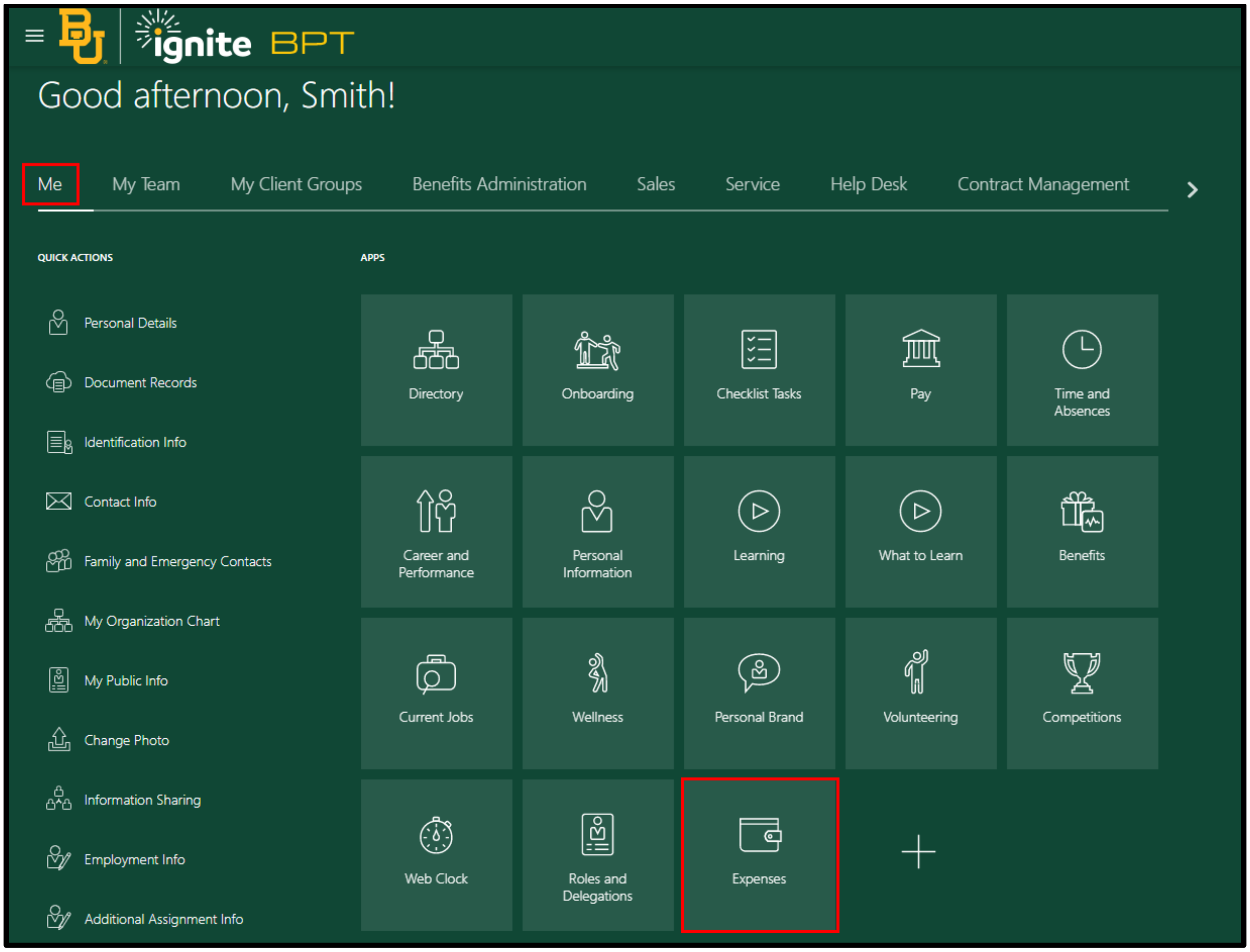
1. You can access the **Expenses** section in two ways:
    a. Click the **Navigator** icon in upper left-hand corner of the Ignite landing page.



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

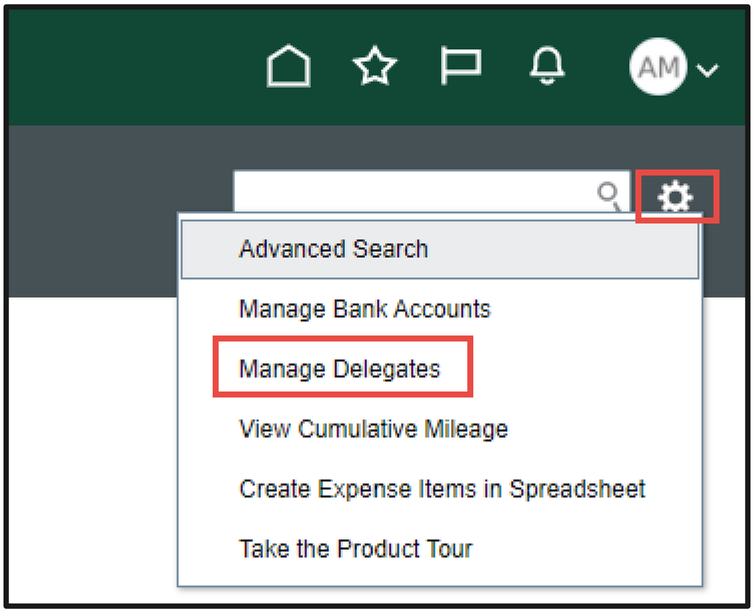


c. (Option 2) Under the **Me** heading on the home page, you can scroll down and click on the **Expenses** tile on the Main Page.



2. Manage Delegates

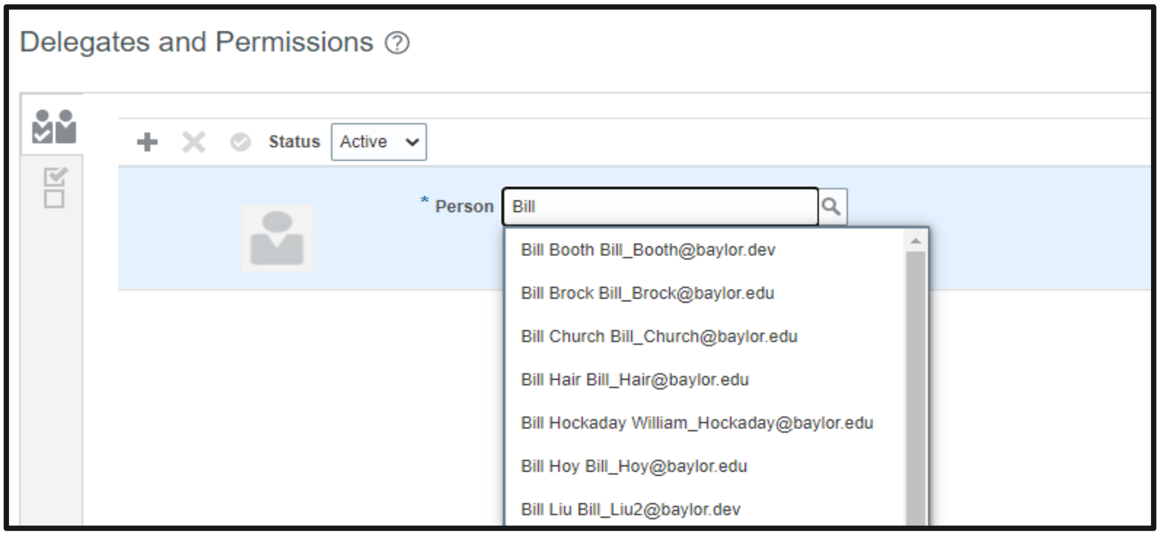
1. Upon entering the **Expenses** work area, click the **gear icon** to the far right of the window. Then click **Manage Delegates**.



   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.

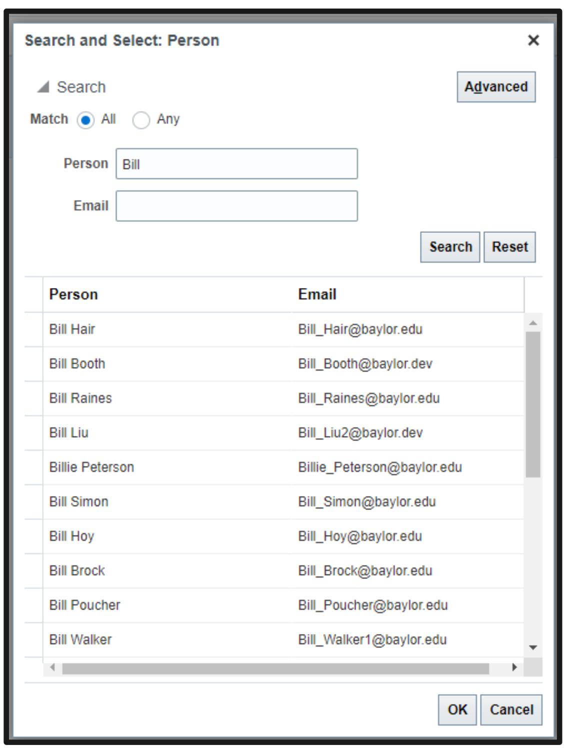
2. Click on the **"+"** Create Icon in the top left of the window.

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**.

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**.