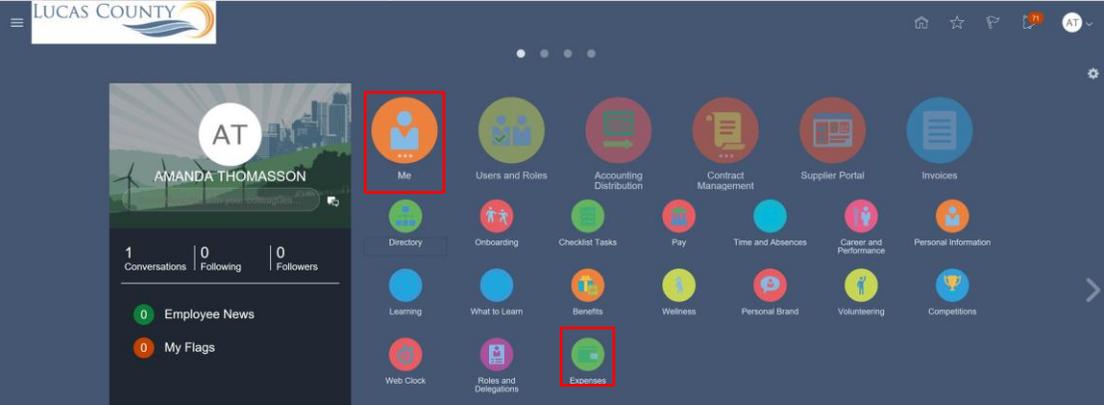
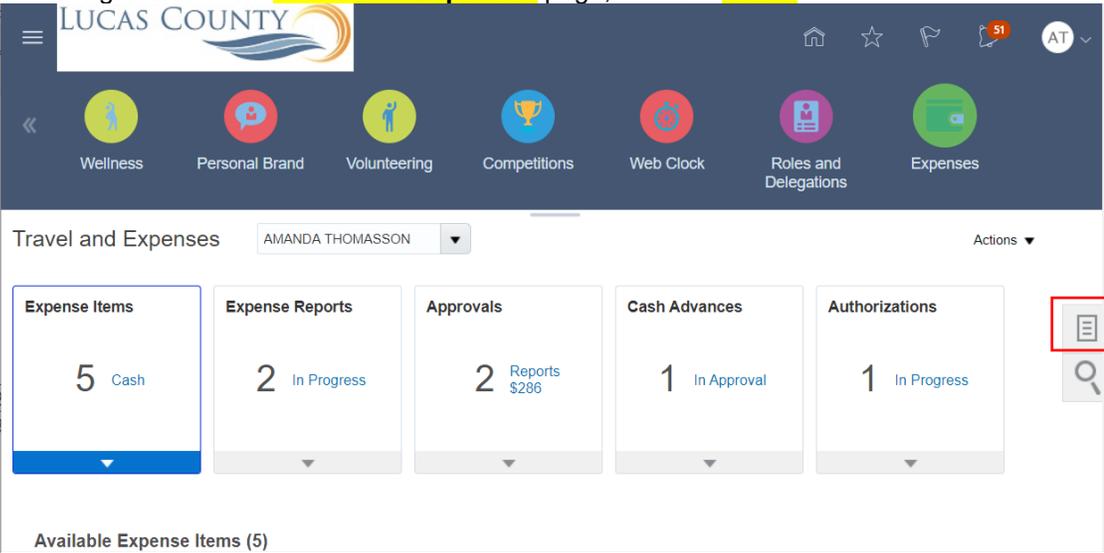
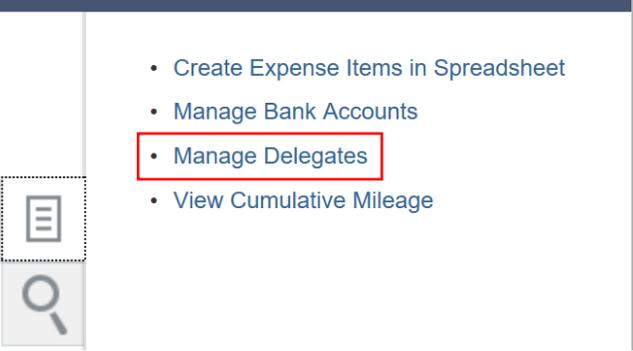
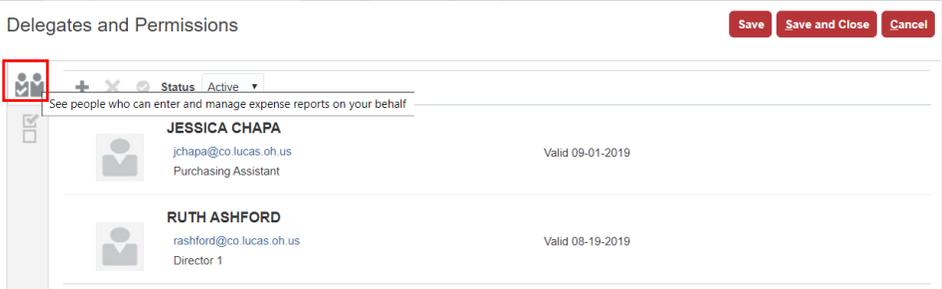
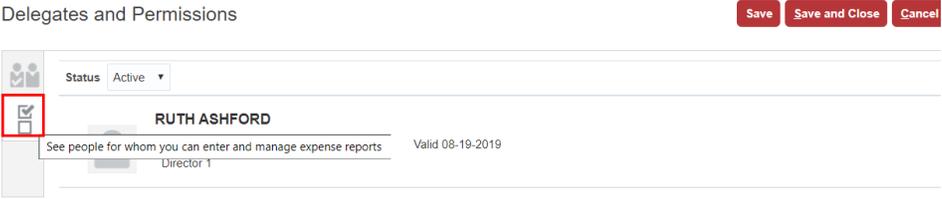


## Manage Delegates

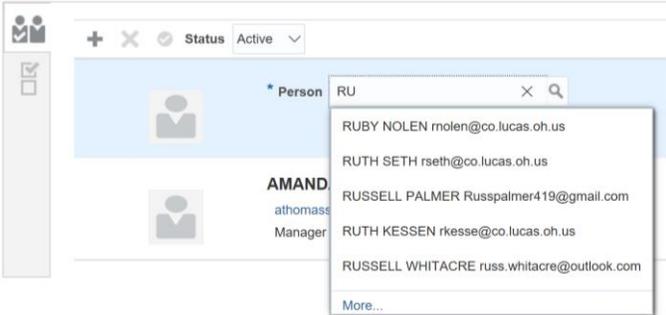
**Audience:** Employee

**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	<p>Log on and navigate to the <b>Expenses</b> work area.</p> 
2	<p>On the right side of the <b>Travel and Expenses</b> page, click the <b>Tasks</b> icon.</p> 
3	<p>Click on <b>Manage Delegates</b> menu item.</p>

	 <ul style="list-style-type: none"> <li>• Create Expense Items in Spreadsheet</li> <li>• Manage Bank Accounts</li> <li>• <b>Manage Delegates</b></li> <li>• View Cumulative Mileage</li> </ul> <p>First time users will need to click the Travel and Expenses link at the bottom of the Expenses start up page.</p>
<p>4</p>	<p>To assign someone who is eligible to enter and manage expense reports on your behalf, you will use the <b>Delegates</b> (people) icon.</p>  <p>To see who has currently given you permission to act on their behalf to view, create and update expense items and reports, use the <b>Permissions</b> (checkboxes) icon.</p> 
<p>5</p>	<p>To Delegate another person to view, create and update expense items and reports, click the <b>Delegates</b> icon. Then click the '+' icon to add a delegate (the person who can act for you).</p> 
<p>6</p>	<p>In the <b>Person</b> field, you will enter a person's name (first and last name in capital letters).</p>

Delegates and Permissions

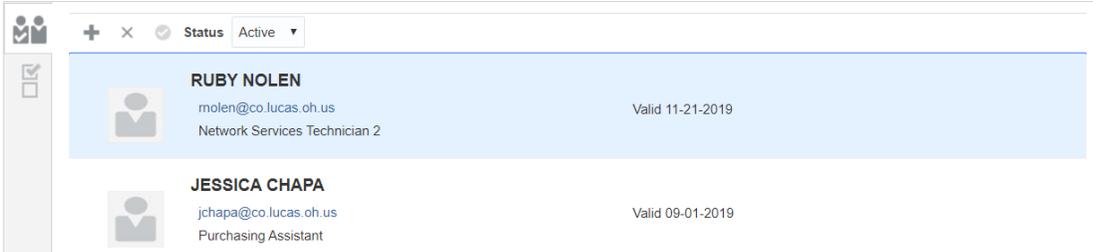


Start entering the first name and pick from the results or use the **Search** capability.

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.

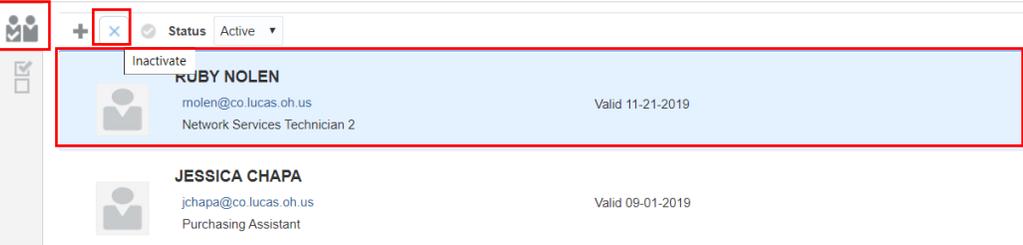
Delegates and Permissions Save Save and Close Cancel



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.

Delegates and Permissions Save Save and Close Cancel



Respond to the inactivate warning by clicking **Yes** to continue.

**Warning**

If you remove this person, the delegate can no longer manage expense reports for you. Do you want to continue?

Yes No

Click the **Save and Close** button.

Delegates and Permissions

The screenshot shows a web interface for managing delegates and permissions. At the top, there are icons for adding (+), deleting (x), and refreshing (circular arrow), followed by a 'Status' dropdown menu currently set to 'Active'. Below this is a list of three users:

Name	Email	Role	Valid Dates
<b>RUBY NOLEN</b>	molen@co.lucas.oh.us	Network Services Technician 2	Valid 11-21-2019 - 11-21-2019
<b>JESSICA CHAPA</b>	jchapa@co.lucas.oh.us	Purchasing Assistant	Valid 09-01-2019
<b>RUTH ASHFORD</b>			