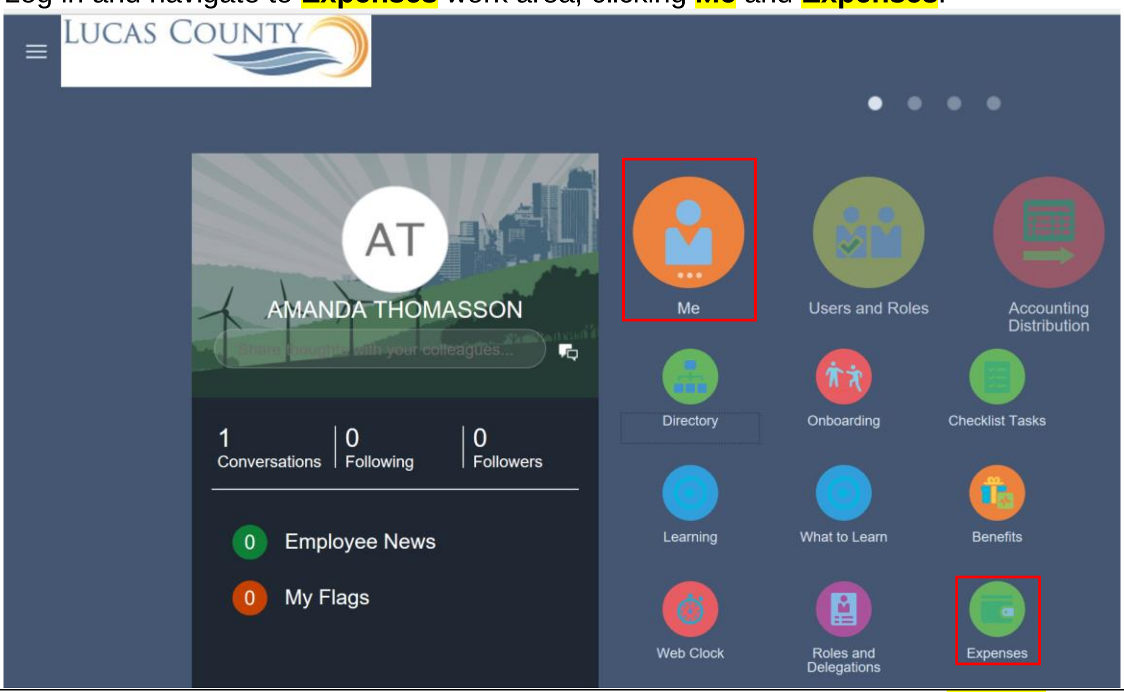
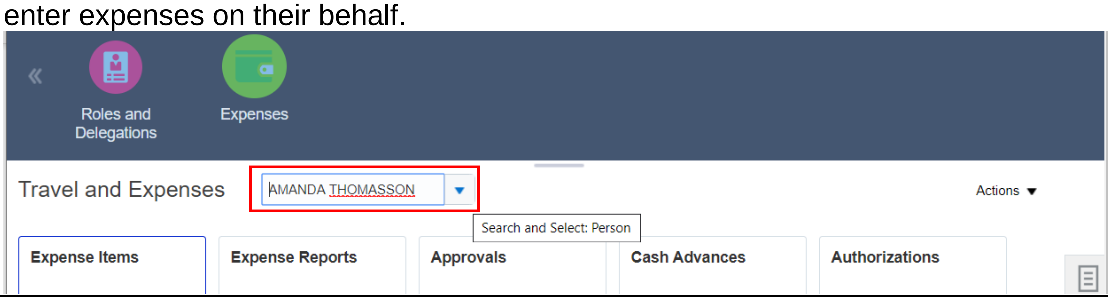
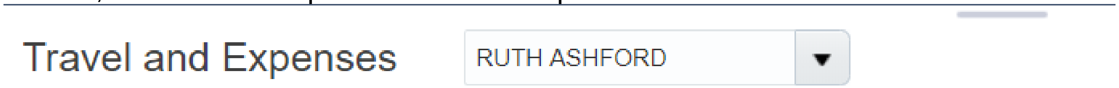
Enter Expenses as a Delegate for Another User

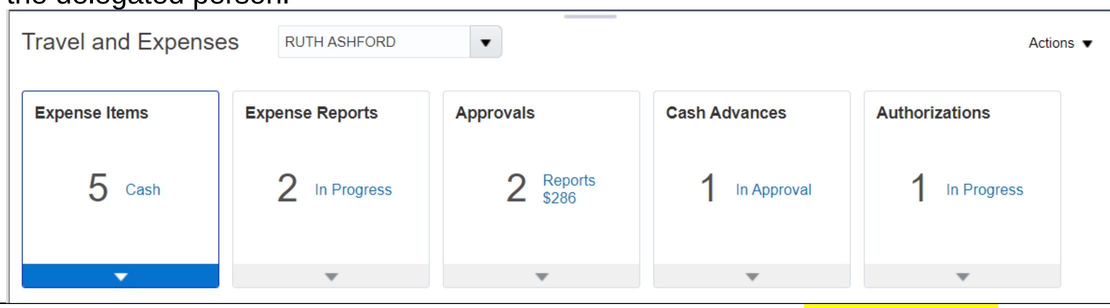
Audience: Employee Delegate

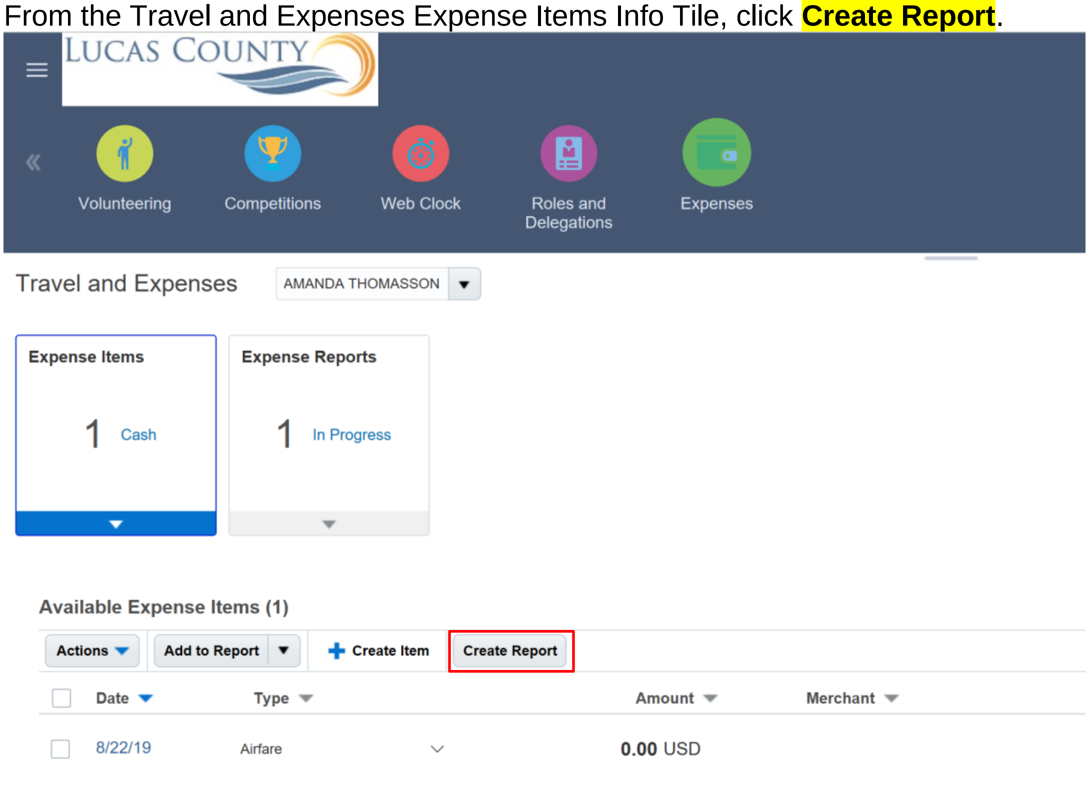
Purpose: Delegates are other employees who can act on behalf of the traveler or PCARD user by reviewing information as well as creating and submitting expense reports. During the period of delegation assigned to you, you have the capability to create, update and submit expense reports for this person as you would for yourself.

This job aid will assist you with creating and updating expense items and reports as a delegate for another user. The steps are similar to EX009 – Create an Expense Report.

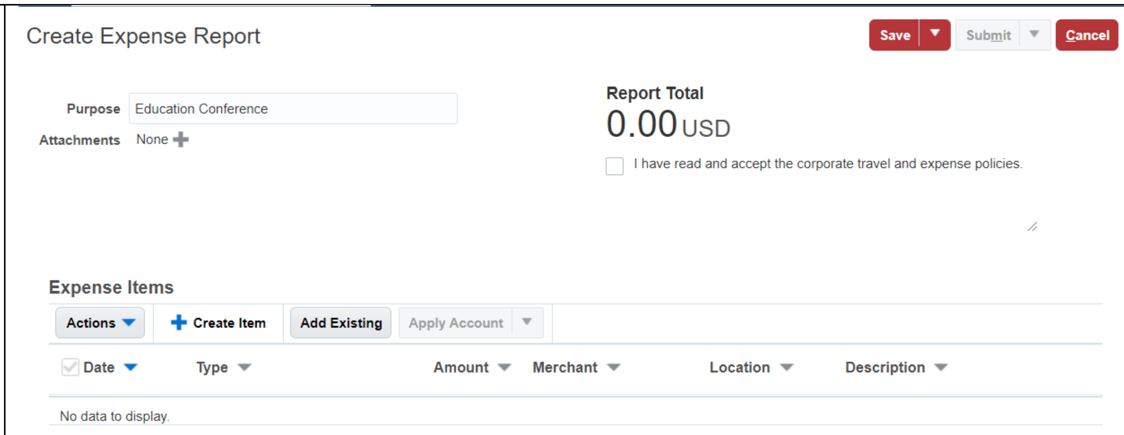
Step	Action
1	Log in and navigate to **Expenses** work area, clicking **Me** and **Expenses**. 
2	The Person indicated in this page defaults to your own name. Select the **Person** pull down list (beside the **Travel and Expenses** page name) to select another user to enter expenses on their behalf. 

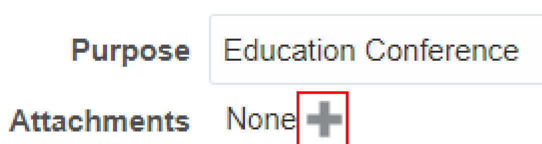
<table>
<tr><td>3</td><td>From the list of names, click to select the name of the Person who has delegated you to view, edit or enter expense items and reports on their behalf.


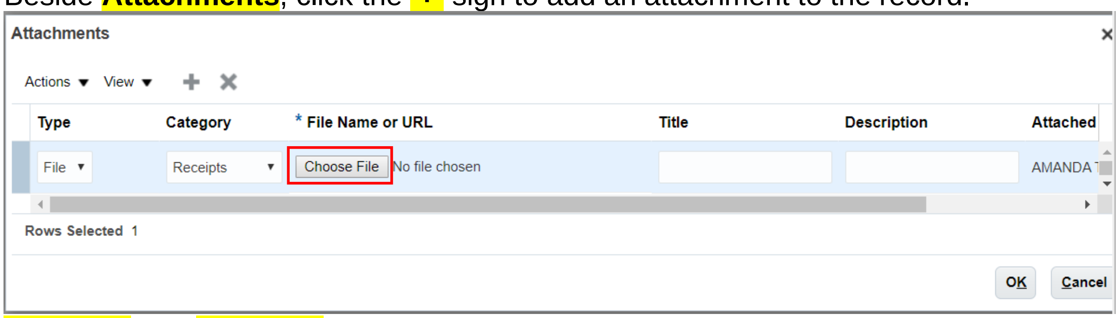
</td></tr>
<tr><td>4</td><td>Expense report, expense items, approvals and authorizations areas are displayed for the delegated person.


</td></tr>
<tr><td>5</td><td>From the Travel and Expenses Expense Items Info Tile, click Create Report.


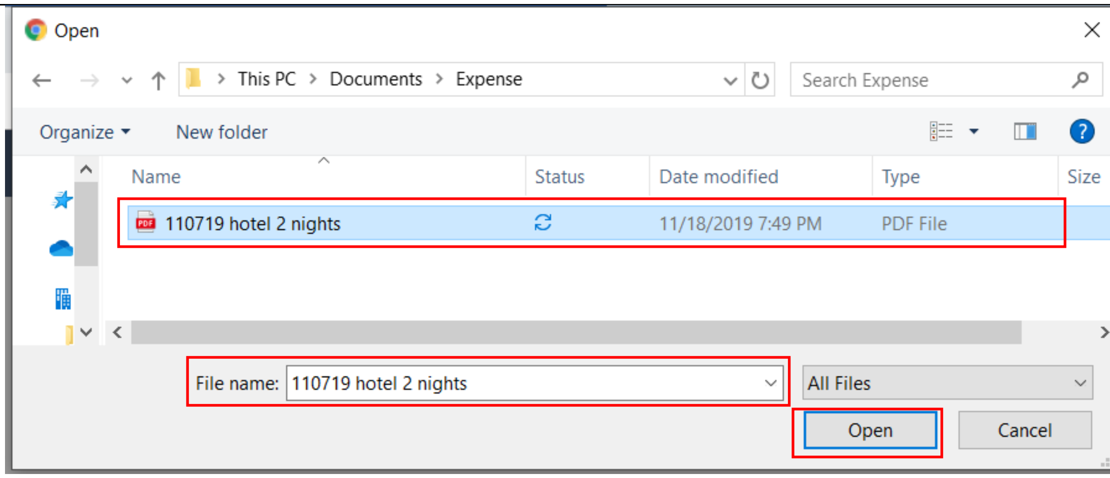
</td></tr>
<tr><td>6</td><td>The Create Expense Report page displays.</td></tr>
</table>

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

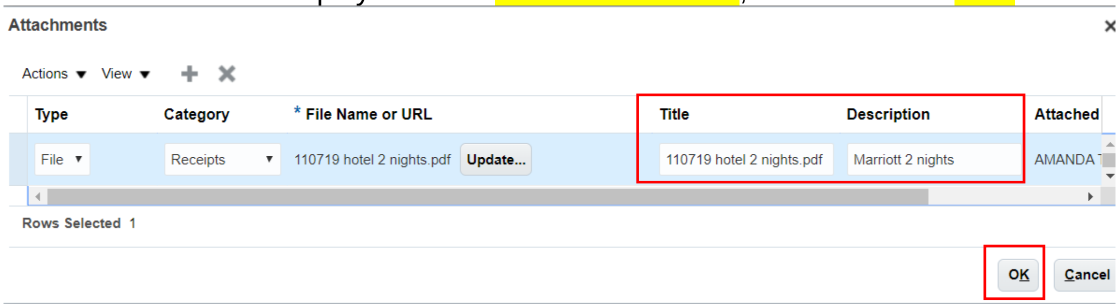
Enter a Purpose (Top left of the page).</td></tr>
<tr><td>7</td><td>Check on the box for “I have read and accept the corporate travel and expense policies.”</td></tr>
<tr><td>8</td><td>Add expense items to the report either by creating an item or by adding an existing item. To create an item, click the + Create Item icon.</td></tr>
<tr><td>9</td><td>Add an attachment to justify the expense. Note: Receipts are required. Report will be rejected if there are no receipts attached.


Beside Attachments, click the ‘+’ sign to add an attachment to the record.


File Type and Category values default. Please choose your File Type and Category appropriately. Use the Choose File button to select a file from your computer and click the Open button.</td></tr>
</table>

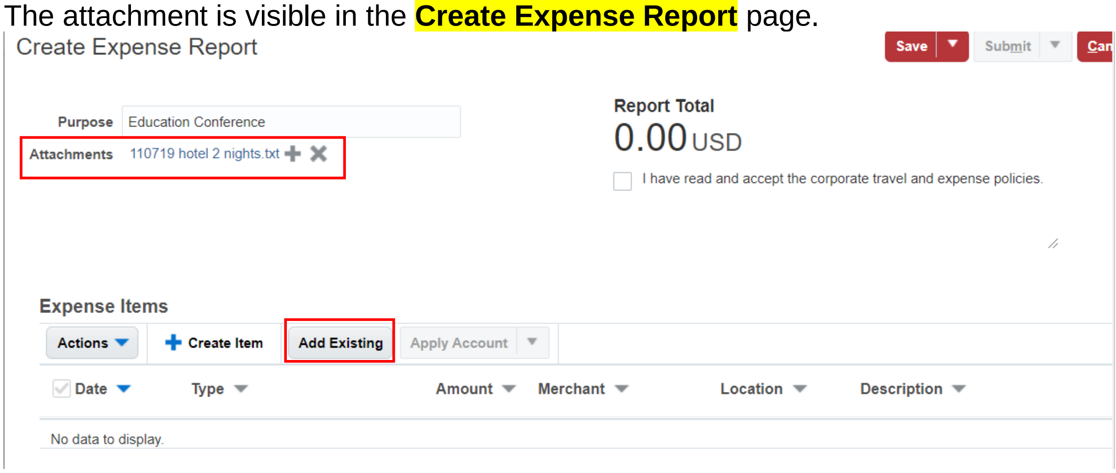


The file name will be displayed under **File Name or URL**, and also in the **Title** field.



Modify the attachment **Title** if necessary and add a **Description**.
Click the **Ok** button.

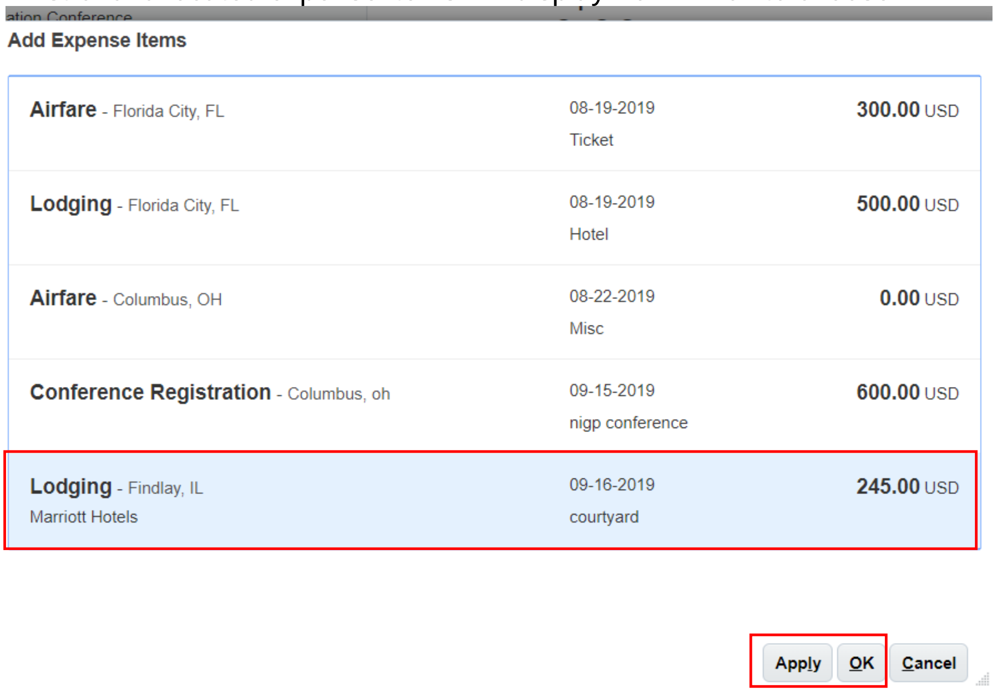
10 The attachment is visible in the **Create Expense Report** page.



Items should then be added that match the transactions on the monthly bank statement and the report total should match the total purchases for the month. Items can be manually added using the **Create Item** button. See ***Job Aid EX-008 Create Edit or Delete Expense Item*** for steps to do so.

Alternatively, to add an existing expense item(s) from the Expense Items list, select the **Add Existing** tab, and make selections from existing items.

11 A list of unallocated expense items will display from which to choose.



Highlight an existing expense item and click the **Apply** button to add to expense report.
Then click the **OK** button.

Click the **Submit** button to submit the Expense Report. A Submit action invokes a confirmation message to determine that all receipts are included with the report.

The following Complete Actions are available:

Save (saves the information and continue)
Save and Close (from Save popup menu, confirmation that expense report is saved and placed under 'In Progress' with status of 'Saved')
Submit (sent for approval)
Cancel (expense report creation activity is cancelled)

12 Select the **Yes** button to process.