How Enter Expense Items or Reports as a Delegate:

You've been assigned as an Expense Delegate – now what?

- This QRG shows you how to access the existing Expense Items; or enter new Expense Items and Expense Reports on behalf of someone else.

Instructions:

1. Another employee must first assign you as an Expense Delegate. See the Delegation Type Fact Sheet for instructions or use Guided Learning.

2. If the delegation has recently been assigned, sign out of Ignite, then sign back in.

3. Access the Expense Module – (Ignite Homepage, Me tab, Expenses tile)

4. At the top of the Expense Module homepage, you will now see an Owner box in the header of the page.

5. Use the drop-down menu to select the owner of the expenses you want to see, or for whom you want to create items.

6. The system displays a banner to confirm for whom you are managing expenses.

7. As a Delegate, you can now reconcile existing expense items, create new expense items, and create expense reports for the owner selected. Refer to the Create Expense Reports & Using Expense Types Job Aids, as necessary.

8. Once the report is submitted, it automatically routes to the OWNER for approval, then to the DEPARTMENT APPROVER.