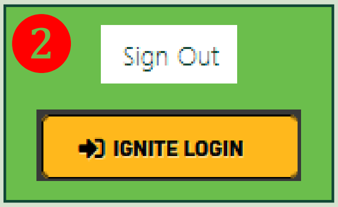
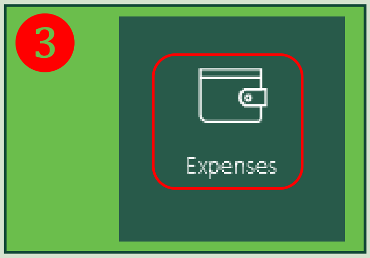
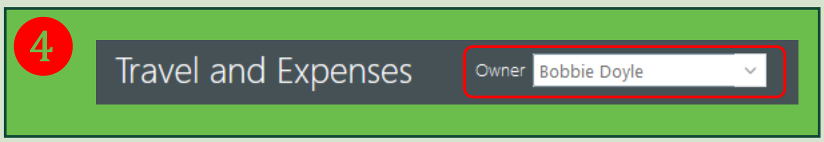
Expense Delegate QRG

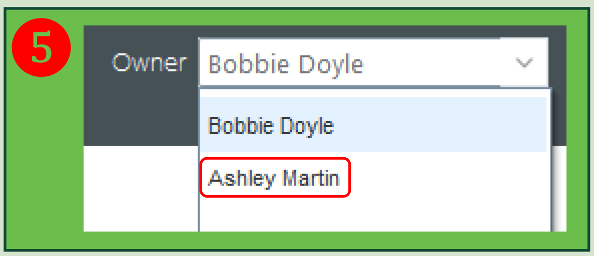
How Enter Expense Items or Reports as a Delegate:

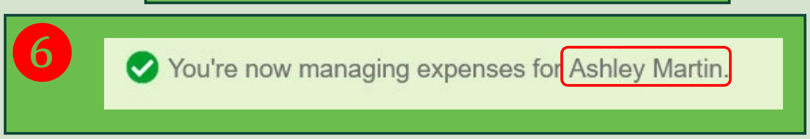
Expense Delegation (Expense Report Creation) ***EXPENSE MODULE***	**Me** tab – **Expense** tile – click the **Gear icon** in the top right corner of the screen – select **Manage Delegates** – click the **Plus Sign (+) icon** – select the **Magnifying Glass icon** - enter the name of the employee or email - click **Search**. **Highlight** the person's name – click **OK** – click **Save**.

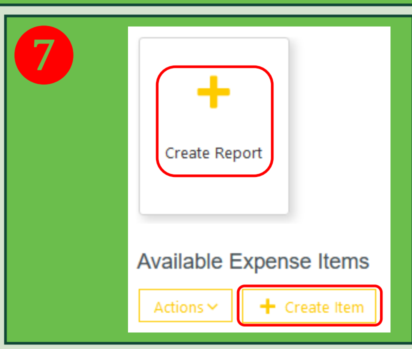


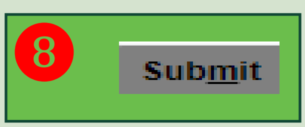












You've been assigned as an Expense Delegate – now what?

- 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.