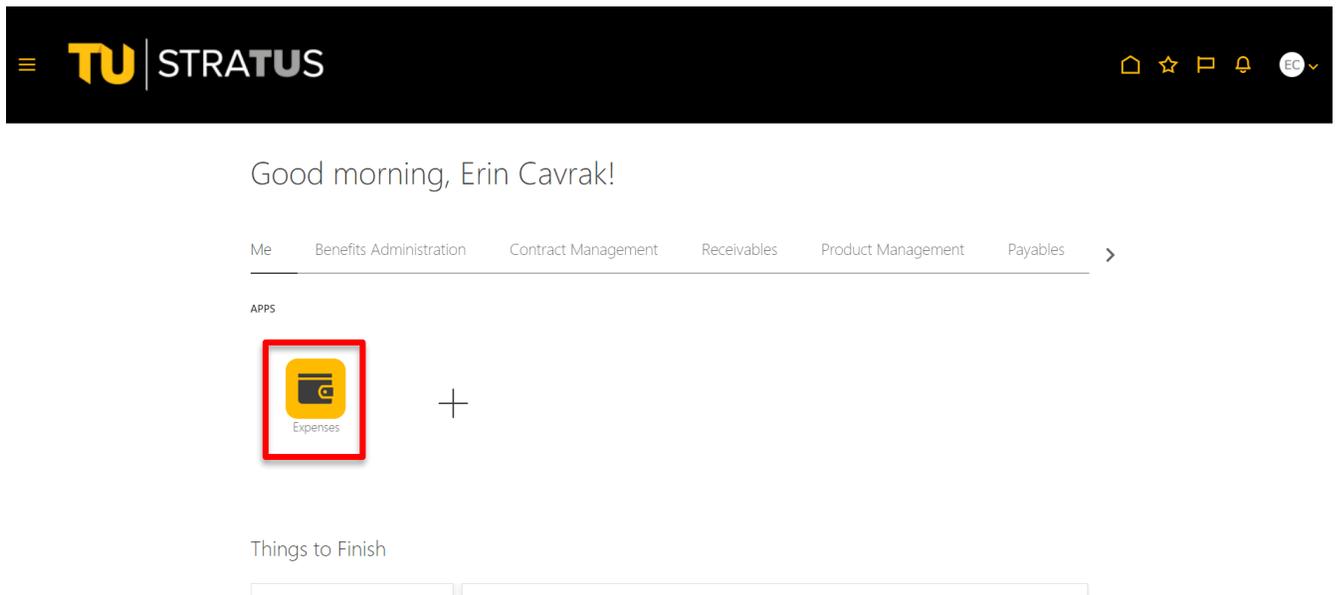


# Expenses – Add & Manage Delegates

For employees adding and/or managing delegates.

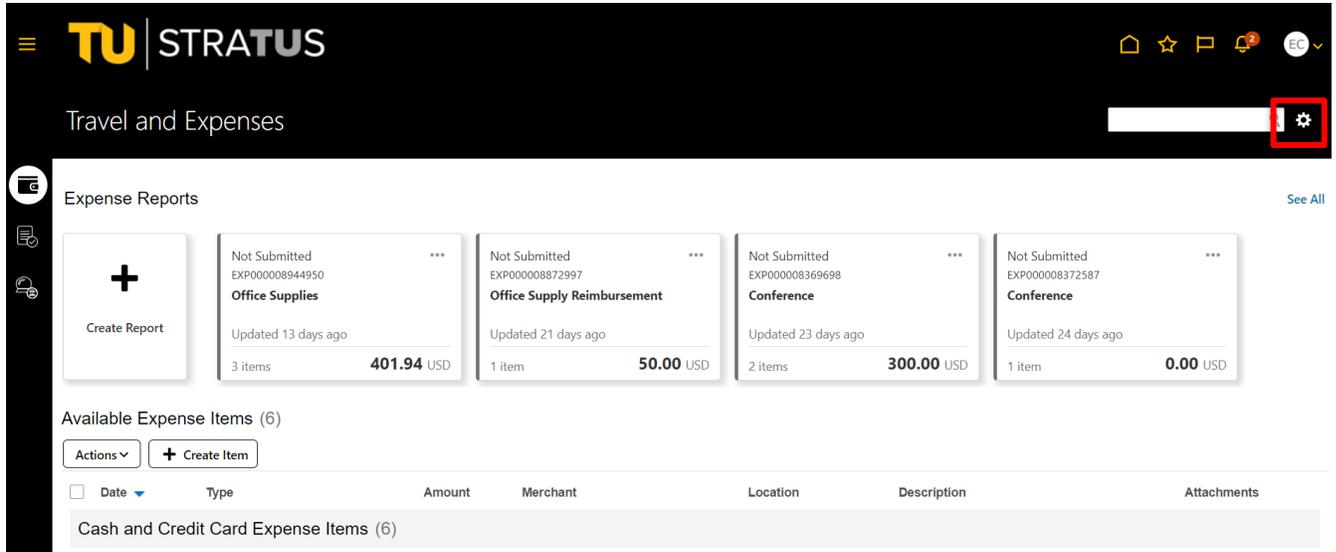
<b>Purpose:</b>	Add and/or manage delegates to allow someone to prepare expenses on your behalf.
<b>How to Access:</b>	Log into the Stratus application. Select the <b>Expense</b> application from the Navigator.
<b>Helpful Hints:</b>	Be sure to keep in mind that... <ul style="list-style-type: none"><li>• This process can apply to all types of expenses (Travel, Reimbursements, and Procard).</li></ul>
<b>Procedure:</b>	Complete the following steps to add and/or manage delegates:

1. On the homepage, select **Expenses** under Me from the sliding menu in the center of the screen.



## Expenses – Manage Delegates

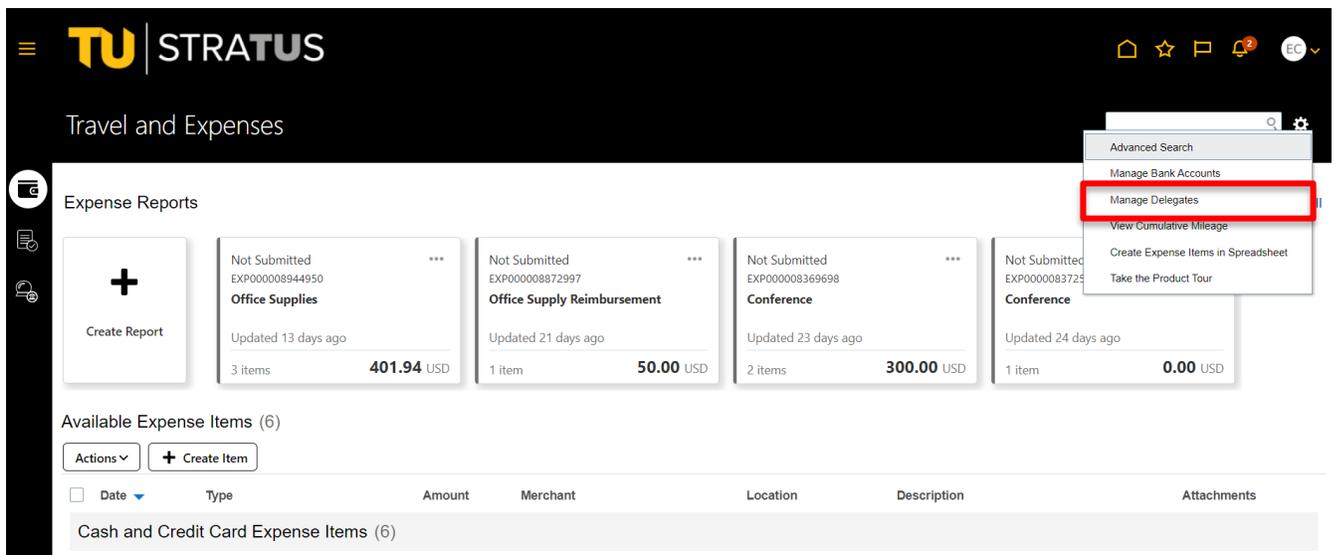
2. On the Expenses homepage, click on the **Gear** icon.



The screenshot shows the TU STRATUS Travel and Expenses homepage. The top navigation bar includes the TU STRATUS logo, a home icon, a star icon, a flag icon, a notification bell icon with a '2' badge, and a user profile icon labeled 'EC'. A search bar is present on the right, and a gear icon (settings) is highlighted with a red box. Below the navigation bar, the page title 'Travel and Expenses' is displayed. The main content area is titled 'Expense Reports' and features a 'Create Report' button and four report cards. Each card shows a status of 'Not Submitted', an expense ID, a description, an update time, and a total amount in USD. Below the reports, there is a section for 'Available Expense Items (6)' with a table header including Date, Type, Amount, Merchant, Location, Description, and Attachments. A dropdown menu is visible in the top right corner, containing options like 'Advanced Search', 'Manage Bank Accounts', 'Manage Delegates', 'View Cumulative Mileage', 'Create Expense Items in Spreadsheet', and 'Take the Product Tour'. The 'Manage Delegates' option is highlighted with a red box.

Date	Type	Amount	Merchant	Location	Description	Attachments
Cash and Credit Card Expense Items (6)						

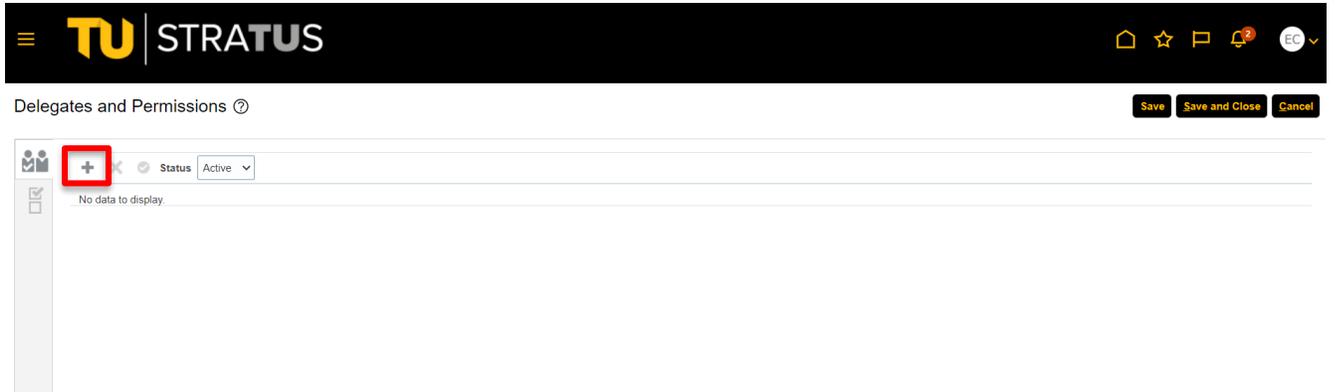
3. Click on **Manage Delegates**.



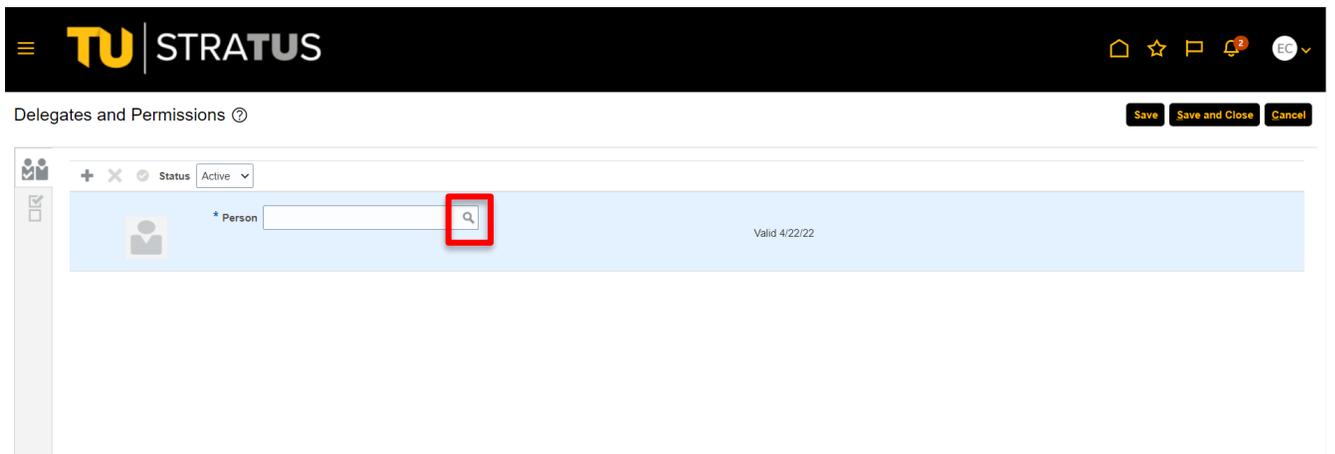
This screenshot is identical to the previous one, but with a dropdown menu open in the top right corner. The menu contains the following items: 'Advanced Search', 'Manage Bank Accounts', 'Manage Delegates', 'View Cumulative Mileage', 'Create Expense Items in Spreadsheet', and 'Take the Product Tour'. The 'Manage Delegates' option is highlighted with a red box.

## Expenses – Manage Delegates

- Click on the Plus (+) sign to Add Delegates.

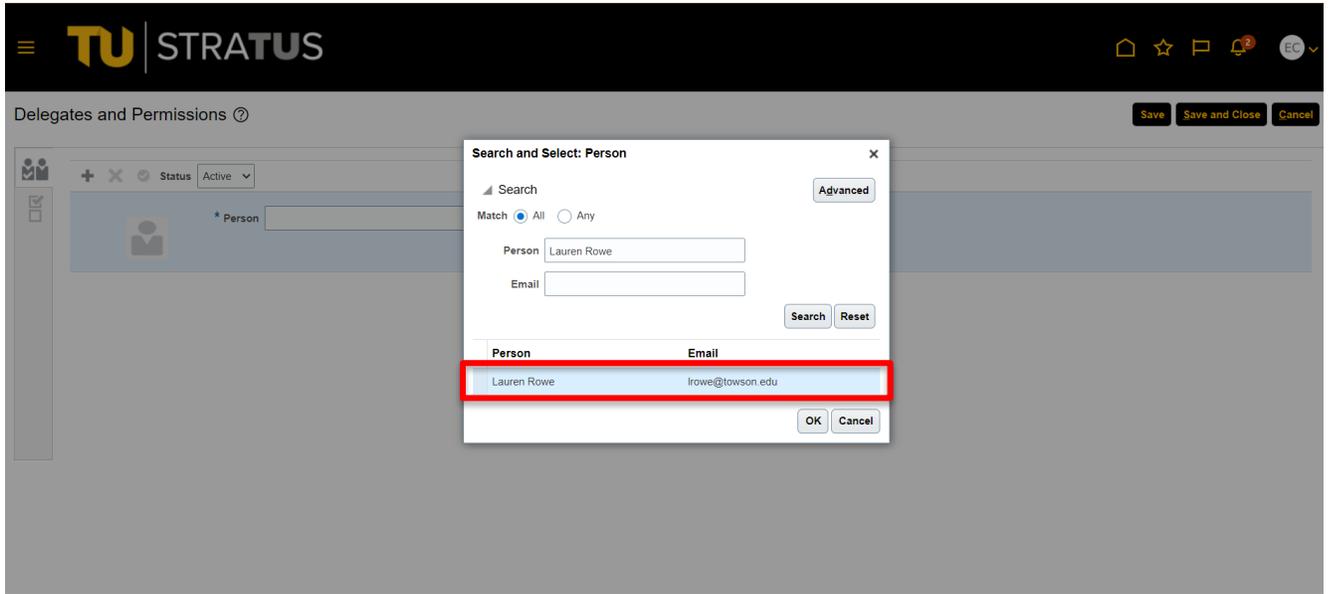


- Clicking on the **magnifying glass** icon allows you to search for a user by name and email.



## Expenses – Manage Delegates

- Click on the user you want so that it is highlighted in blue and click **OK**.

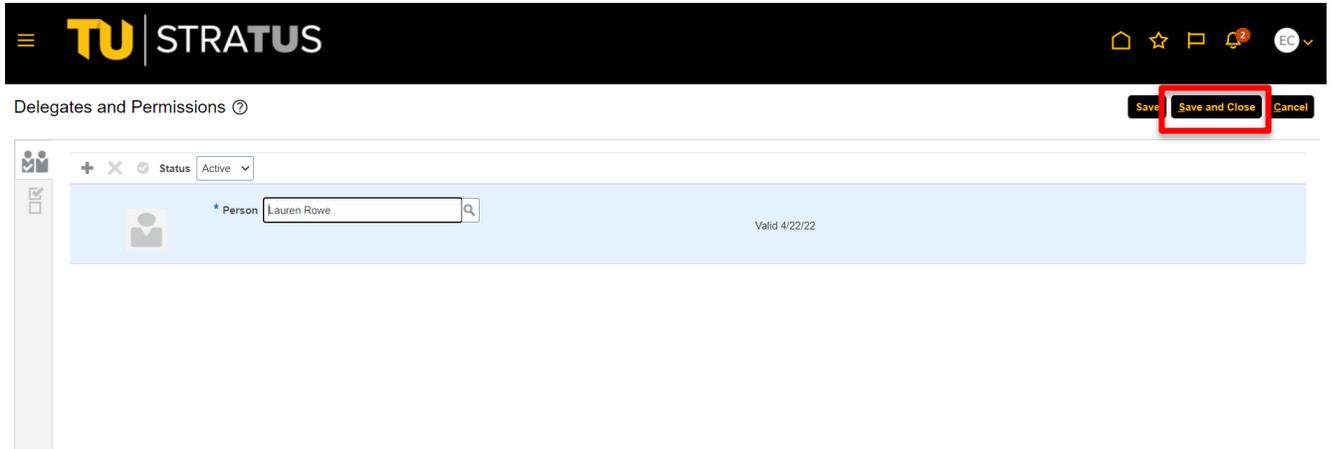


- The name should now be populated with a “valid date”. This person now has the authority to create travel authorizations and expense reports on your behalf. **NOTE:** The expense report will still route to you for review and approval before it gets picked up in the workflow for approval.

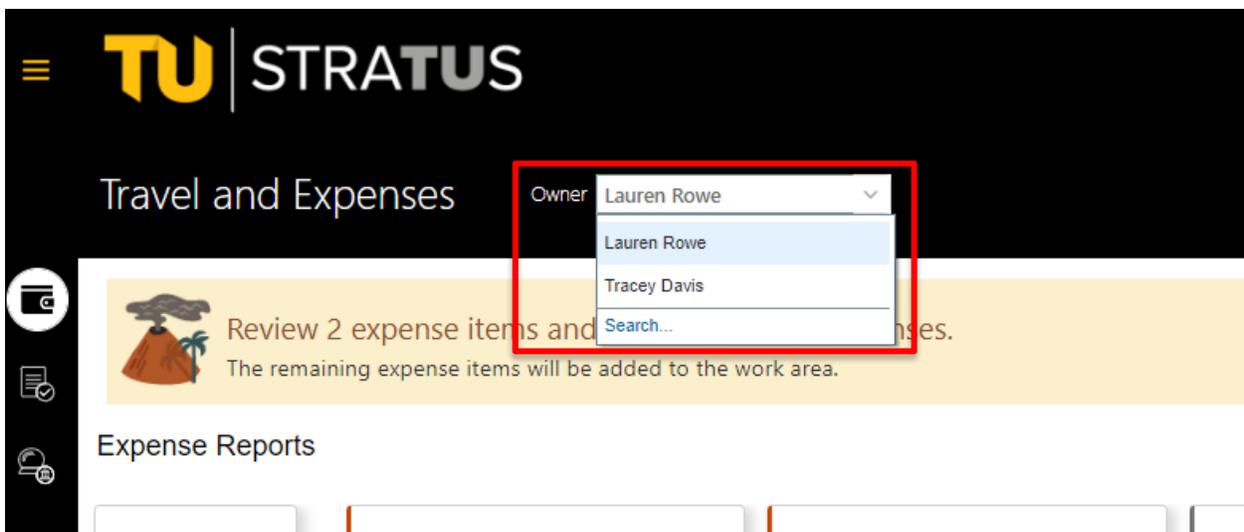


## Expenses – Manage Delegates

8. Click **Save and Close**.



9. If you are **assigned as a delegate of someone**, on the Expenses homepage, there should be a new field titled **Owner** that will default to you. The field will have a dropdown arrow where you can select the different individuals you can prepare Expenses for.



## Expenses – Manage Delegates

10. Select the person you want to prepare expense items for and you will be taken to their expense homepage. You can now enter expenses on their behalf.

The screenshot shows the TU STRATUS interface for managing delegates. The header includes the TU STRATUS logo and the text 'Travel and Expenses'. A dropdown menu for 'Owner' is highlighted with a red box, showing 'Tracey Davis' selected. A tooltip above the dropdown reads 'Select a person for whom you can enter and manage expense report'. Below the header, there is a 'Create Report' button and a table of 'Available Expense Items (1)'. The table has columns for Date, Type, Amount, and Merchant. One item is listed: 4/14/22, Academic Printer Replace, 55.00 USD.

**NOTE:** Submitted expense reports will follow the traveler (Owner's) approval workflow. It will go to their immediate supervisor and any cost center managers/financial stewards of the cost center used.