Expenses – Add & Manage Delegates
For employees adding and/or managing delegates.

Purpose: Add and/or manage delegates to allow someone to prepare expenses on your behalf.

How to Access: Log into the Stratus application. Select the Expense application from the Navigator.

Helpful Hints: Be sure to keep in mind that...

- This process can apply to all types of expenses (Travel, Reimbursements, and Procard).

Procedure: 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.
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2. On the Expenses homepage, click on the Gear icon.

3. Click on **Manage Delegates**.
4. Click on the Plus (+) sign to Add Delegates.

5. Clicking on the **magnifying glass** icon allows you to search for a user by name and email.
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6. Click on the user you want so that it is highlighted in blue and click **OK**.

![Image of user management interface]

7. 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.

![Image of user management interface with a valid date]
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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.
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.

**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.