Setting delegates in iExpenses

iExpenses is used by employees or their delegates to process expense reports for University credit card transactions, expense reimbursements and acquit cash advances. Employees can process their own expenses or delegate someone else, such as Business Centre staff or an administrative assistant, to enter expense report transactions on their behalf. Delegates will be able to log into iExpenses and prepare the expense report transactions for another employee however the employee for whom the transactions were generated is still required to log into iExpenses and submit the report themselves. The employee will need to check the details entered by their delegate and make the declaration that the transactions are all true and correct before clicking on the submit button. Instruction on creating an expense report are not covered here, please refer to reference card Create an Expense Report for details.

This reference card covers setting up delegates.

Set up a delegate in iExpenses

Log into Themis, navigate to UOM Staff Self Service > Internet Expenses and select the Expenses Home menu option.

1. Click on the Access Authorizations link on the top of the screen.

   The Access Authorizations screen displays.

   Note: the people listed in the Expense Entry Permissions section on the right are people who have granted you permission to enter expense transactions on their behalf.

2. Click the Add Another Row button.

   A blank line will display.

3. Click the Search icon, and search for the person to be added as your delegate.

   Enter the last name of the person to be added in the search field and click Go. Locate the relevant person in the list of returned search results and click the Quick Select icon to select them.
The selected person’s name has now populated into the blank line under the Expense Entry Delegations section.

4 Click the Save button.

A confirmation message appears at the top of the screen indicating that the person has now been granted access to act as your delegate.