



## Manage Delegates for Expense Report Submission

*This guide will cover:*

- *Delegating the submission of your expense report to another individual.*

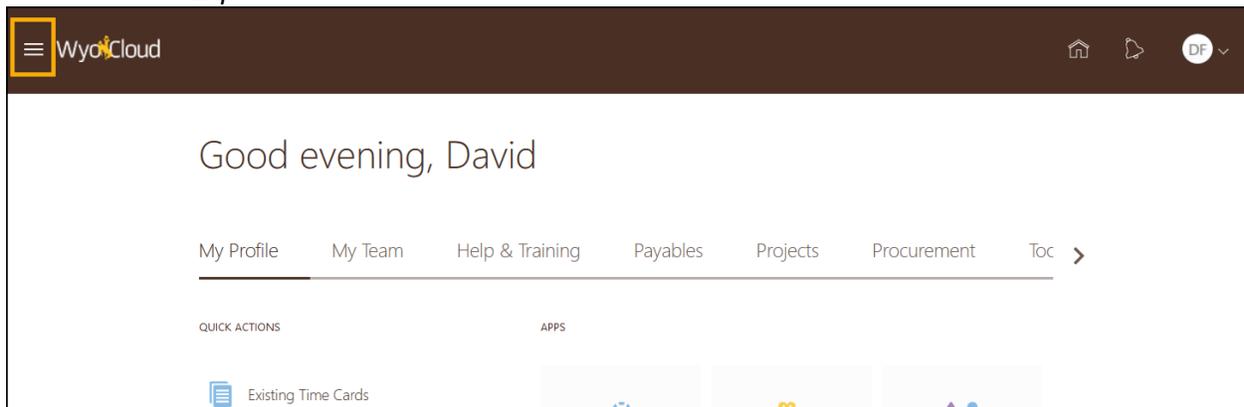
**Managing Delegates for Expense Reports:** Many employees on campus will submit Expense Reports for travel, reimbursements for purchases and for procurement card (p-card) transactions. It is recommended that UW personnel establish a preferred delegate, such as the department accountant, to review account coding and submit the Expense Report. Delegating does not remove your access to enter expense reports, it just adds another person that can also see that information in the system.



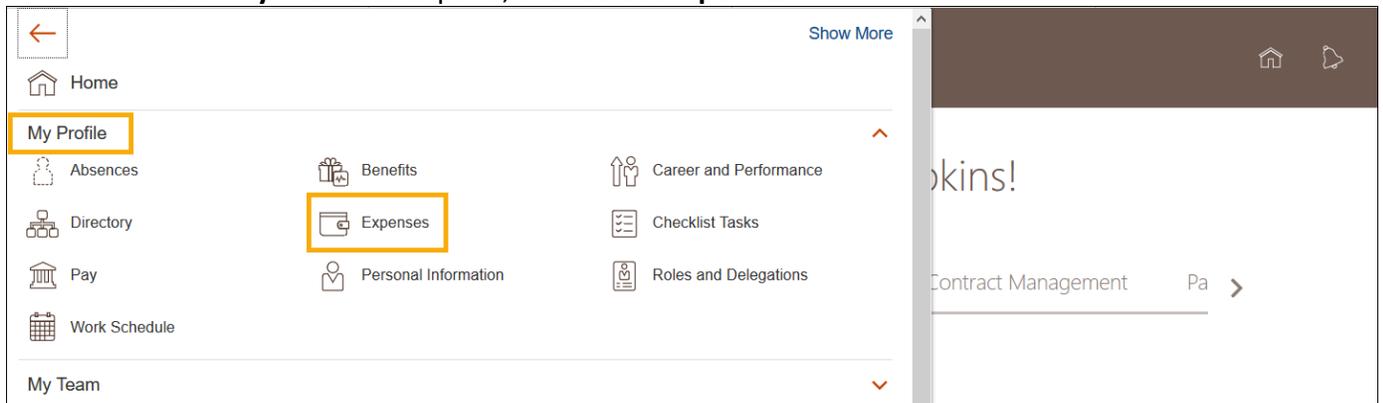
**Note:** The expense report owner and the delegate cannot be attempting to prepare or modify expense reports for the same user at the same time. The expense owner and their delegate will need to coordinate should they both need to be working expenses for the owner.

### Step One

- Upon accessing WyoCloud from WyoWeb, use the navigator in the upper left corner to access *Expenses*.



- First click **My Profile** to expand, then select **Expenses**.

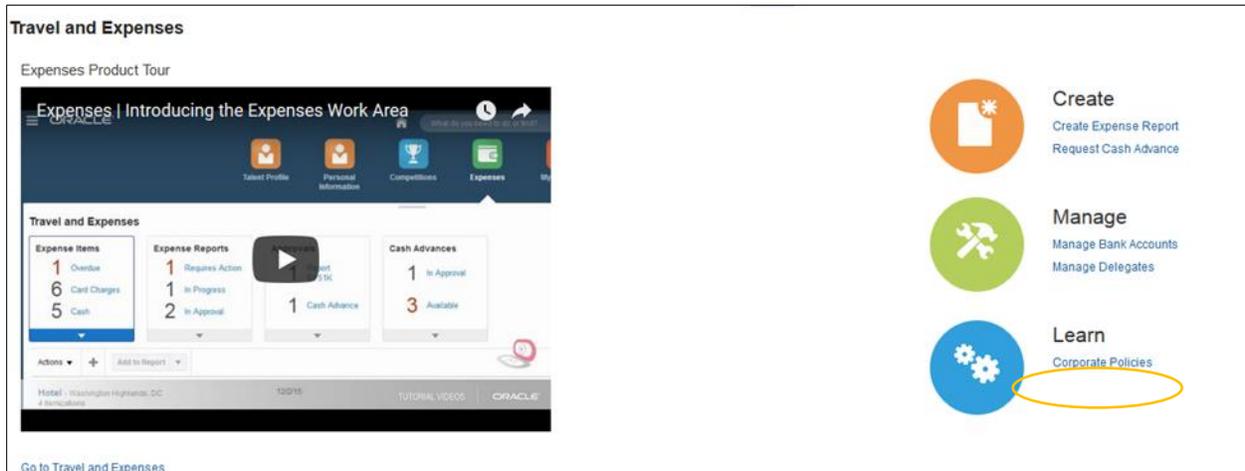




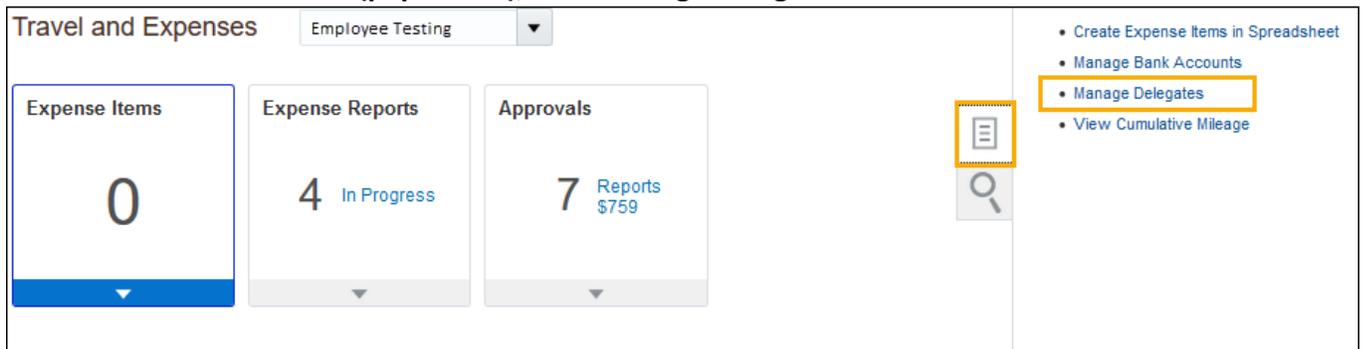
## Step Two

Delegate your expense report.

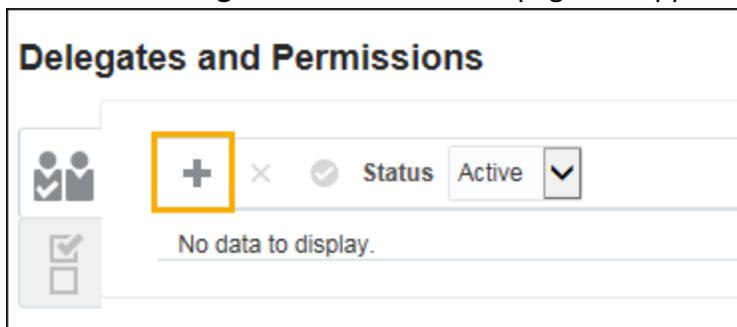
- There are *two different ways the Travel and Expenses page may display*, in option one you'll select **Manage Delegates** on the right side of the page:



- In option two, the Travel and Expenses homepage will display and you will need to click on the **Tasks Menu (paper icon)**, then **Manage Delegates**.

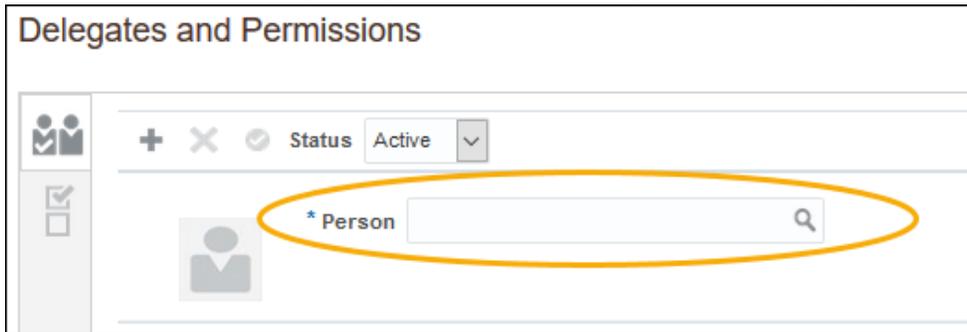


- The **Delegates and Permissions** page will appear. Select the **Add icon (+)**:

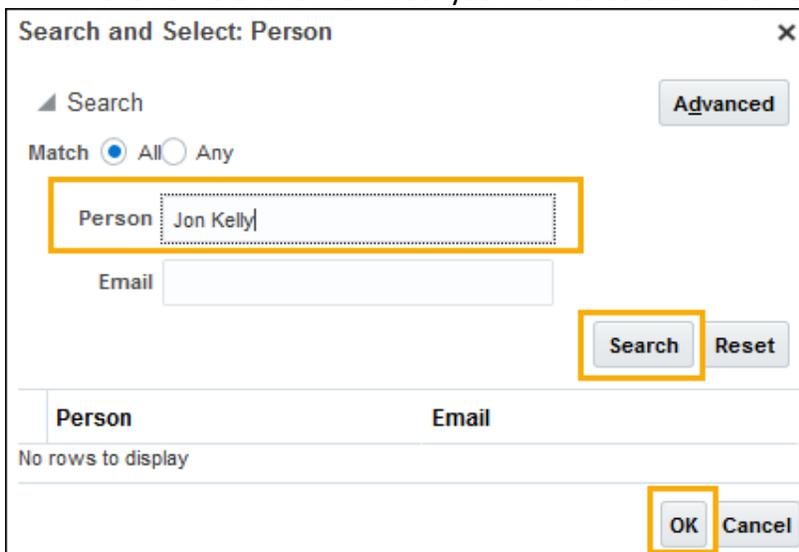




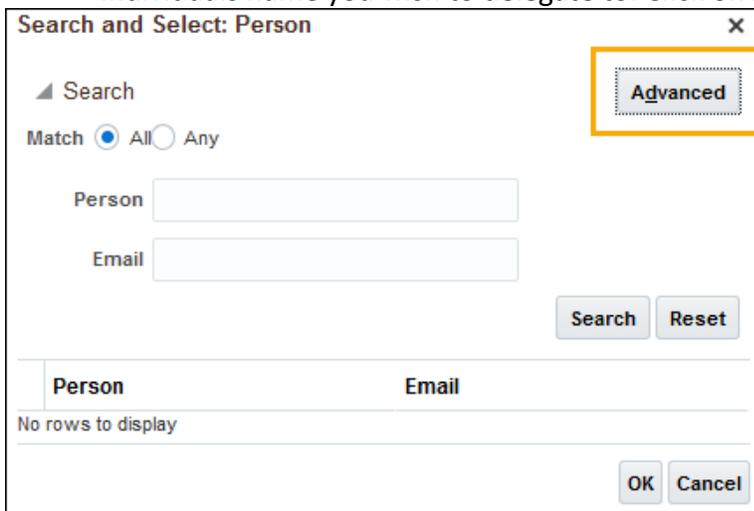
- This will open a pop-up window in which you will identify your delegate:



- Click on the **Search** icon to open the **Search and Select: Person** pop up window. Type the name of the individual you wish to select in the **Person** field, then click **Search**.



- Your results will appear in the bottom half of the window. Once you've selected the appropriate person, click **OK**.
- Additionally, you may use the **Advanced** feature to assist you in searching the individuals name you wish to delegate to. Click on **Advanced**.





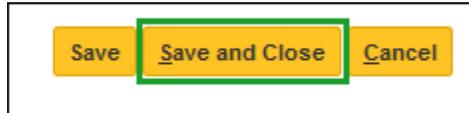
- New prompts will appear next to the **Person** and **Email** field. Use the drop down arrow to view the different options for searching and select the appropriate option.

- Click **Search**.
- Your results will appear in the bottom half of the window. Once you've selected the appropriate person, click **OK**.



**Note:** You may delegate to *multiple* individuals. To do so, replicate the steps above to add more delegates.

- In the top right hand corner of your screen, select **Save and Close**.



**Note:** When a delegated Expense Report is submitted on your behalf, you will receive an email notification to review and approve it within WyoCloud. You may also view any pending approvals upon logging into WyoCloud Financial Management, looking for a red number next to the bell icon in the upper right corner, and clicking on the bell for more details.

**You have now completed the steps of Managing Delegates for Expense Report Submission.**