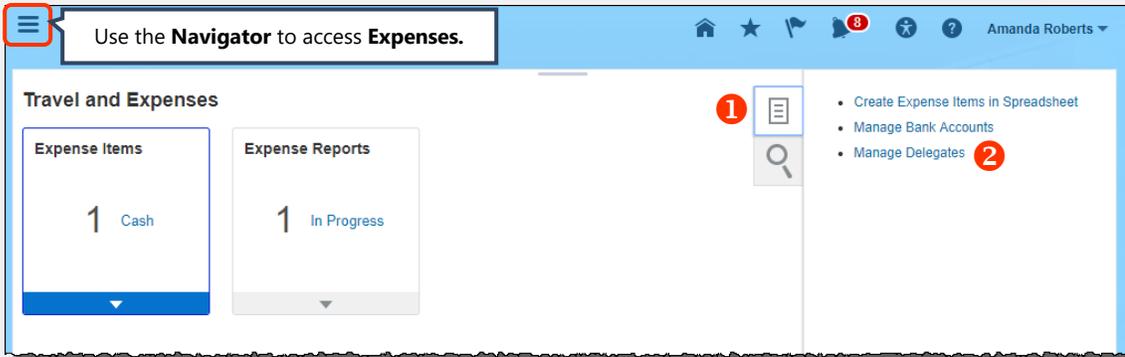


The **Oracle Cloud Expenses** module allows a user to designate a **delegate** to enter and manage expense reports on his or her behalf using the following steps

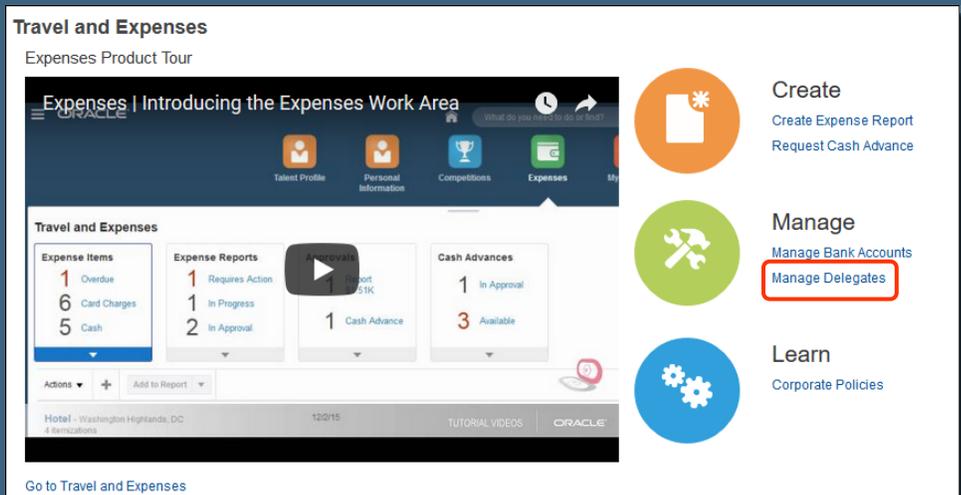
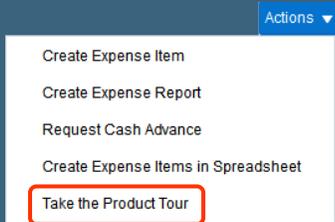
Selecting a Delegate in Oracle Cloud Expense



- 1 From the **Oracle Cloud Expenses** module, click the **Tasks** icon.
- 2 Then click **Manage Delegates**.

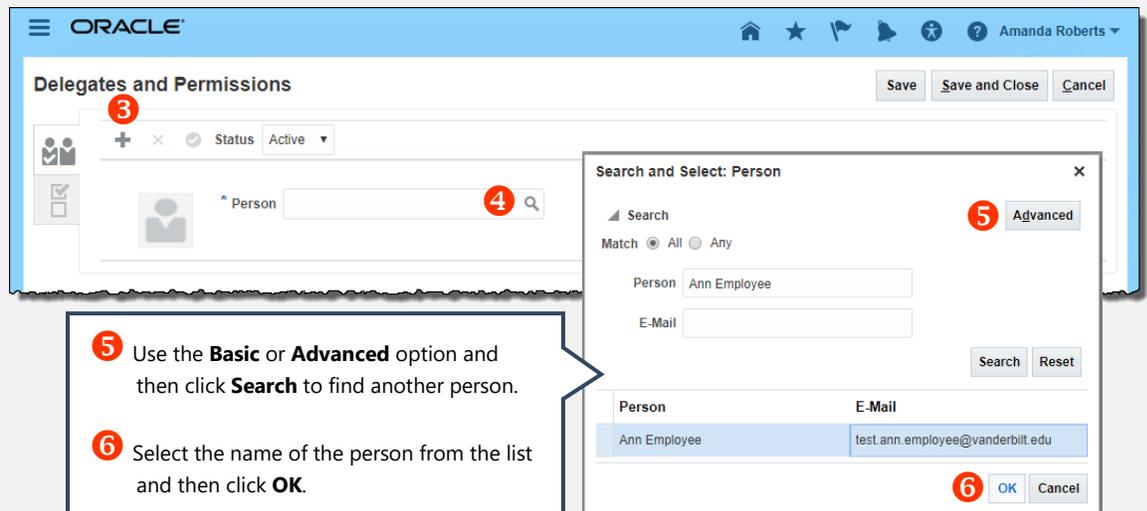
NOTE: When logging into the **Expenses** module, the **Tasks** icon (1) may not be visible. If this occurs, select **Manage Delegates** from the **Travel and Expenses: Expenses Product Tour** screen.

Note that if you need to access the **Expenses Product Tour** screen from the **Expenses** page, you can access it using the **Actions** drop-down menu:



- 3 From the **Delegates and Permissions** page, click the **plus sign (+)** to add a person.

- 4 Then enter the name of another person or use the search feature (5).



- 5 Use the **Basic** or **Advanced** option and then click **Search** to find another person.

- 6 Select the name of the person from the list and then click **OK**.

<continues on next page>

Managing Delegates in Oracle Cloud Expense (continued)

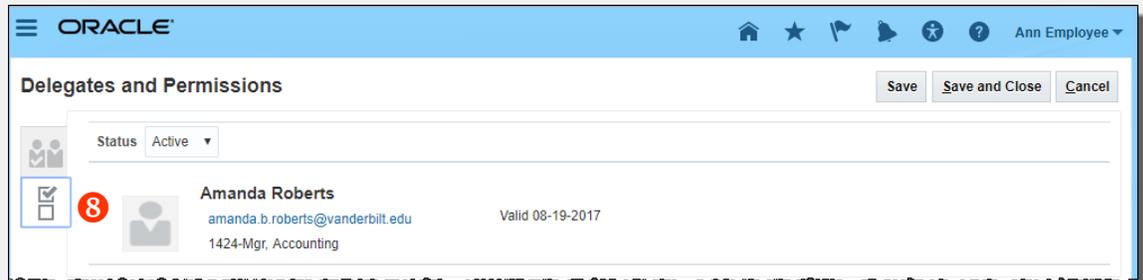


7 Click **Save** to confirm your selection. Then review the delegate's information.

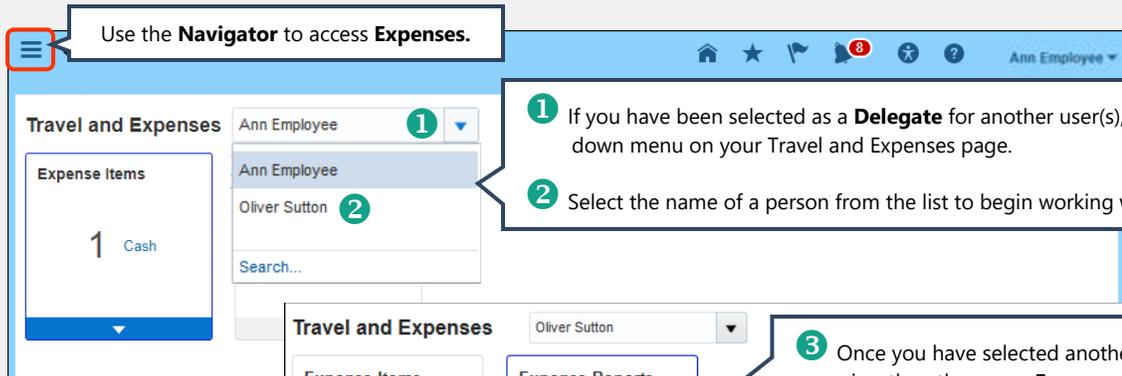
The delegate will be valid as of the date indicated.

Repeat steps 1-7 as needed to add delegates, then click **Save and Close**.

8 An employee who has been selected as a delegate can see the names of persons who have designated them as their delegates by clicking the second icon in the list.

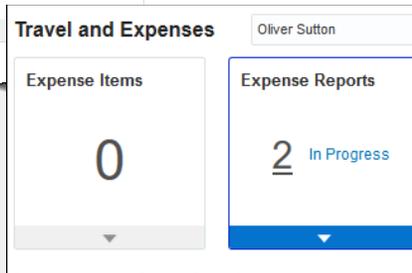


Preparing Expense Reports as a Delegate in Oracle Cloud Expense



1 If you have been selected as a **Delegate** for another user(s), you will see a drop down menu on your Travel and Expenses page.

2 Select the name of a person from the list to begin working with *their* expenses.



3 Once you have selected another person's name, you will view the other users **Expense Items** and **Expense Reports** and can select an item or report to begin working on their behalf.

When you are finished, return to the drop-down menu to select another user or return to your own **Travel and Expenses** page. (1)



4 **IMPORTANT:** As a delegate, you should not submit a report on behalf of another user. If you have completed a report and it is ready for them to review and submit, **Save** the report, and then click the drop-down menu to **Save and Close** the report.

Then contact the user (e.g., by email, by phone) to alert them that the report is ready to be submitted. They should then log into the system, click the check box to confirm acceptance of the travel and expense policy and submit the report for approval.