Travel Management System (TMS)

JOB AID # 5.16		Date: 03/29/2012

Job Aid Description: Delegate – Creating an Expense Report as a Delegate

You may prepare expense reports for anyone who has assigned you as their Delegate.

1. Log into the Travel Management System with your personal log in information.

2. To serve as a person's delegate, Click the "**You are administering for:** **Yourself**" link.

3. Click the **You are administering Expense** for dropdown arrow.

4. Select the name of the person you are creating the Expense Report for. (Note: Your name still appears at the top of the screen. However, you can see who you are currently performing tasks for in the **You are administering Expense for**: **(Employee Name)** field.)

5. Click on the **Expense** tab, then **New Expense Report**.

6. Complete the **Report Header** per the standard Report Header guidelines.

7. Add a pre-approved **Travel Request** if applicable. Then click **Next.**

8. **Import** any University paid/pre-booked (Smart Charges) to the expense report.

9. Click the **New Expense** button to add any additional out-of-pocket transactions to the report.

10. Review expenses accuracy and completeness and attach any required receipts.

11. Click **Notify Employee**. (Note: you will not be able to directly submit an Expense Report to a department manager for another employee. They must log in as themselves, review the report you created, and click Submit.)

12. To stop acting as a delegate, click the **"You are administering for: (Employee Name)"** then select **Me**.