

Procurement: Delegating Expenses

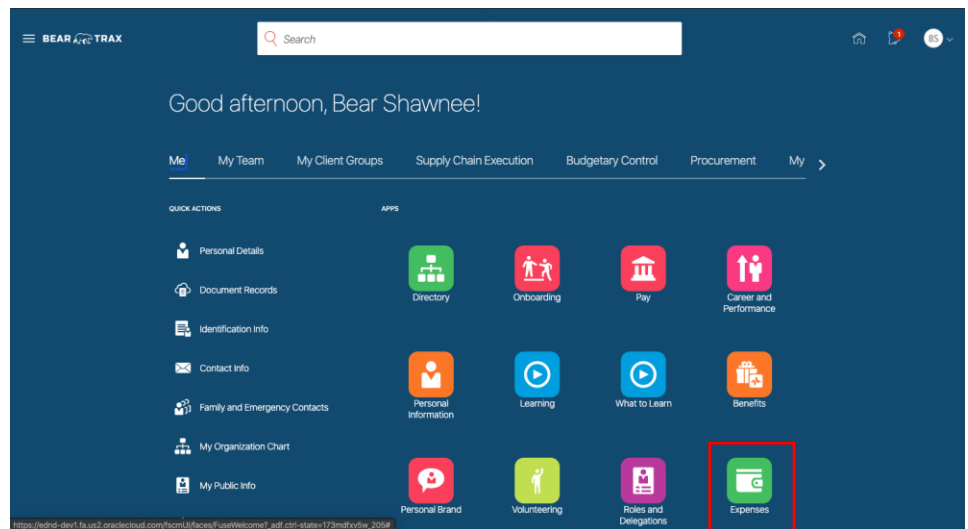
For all Employees

Purpose: To add people as delegates to the expense module.

How to Access: Log into the [Bear Trax](#) application. Select the task in the Navigator.

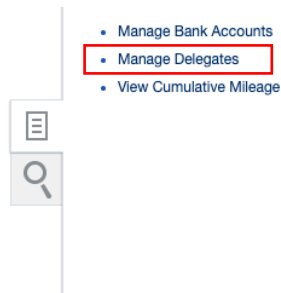
Procedure: Complete the following steps to delegate expenses:

1. Navigate to the **Expenses** icon from the home screen.

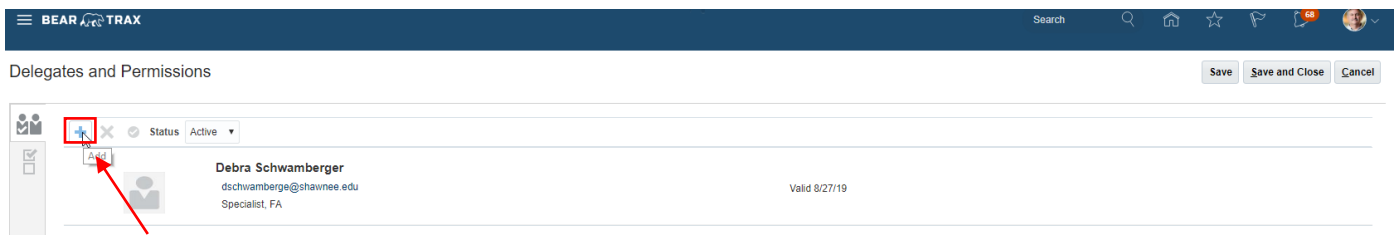


2. From the Expenses page, select the **Tasks Tab** and navigate to **Manage Delegates**.

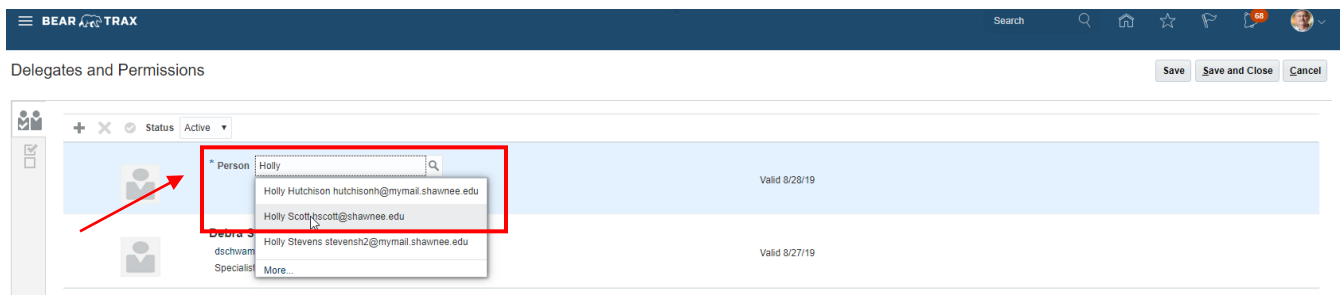




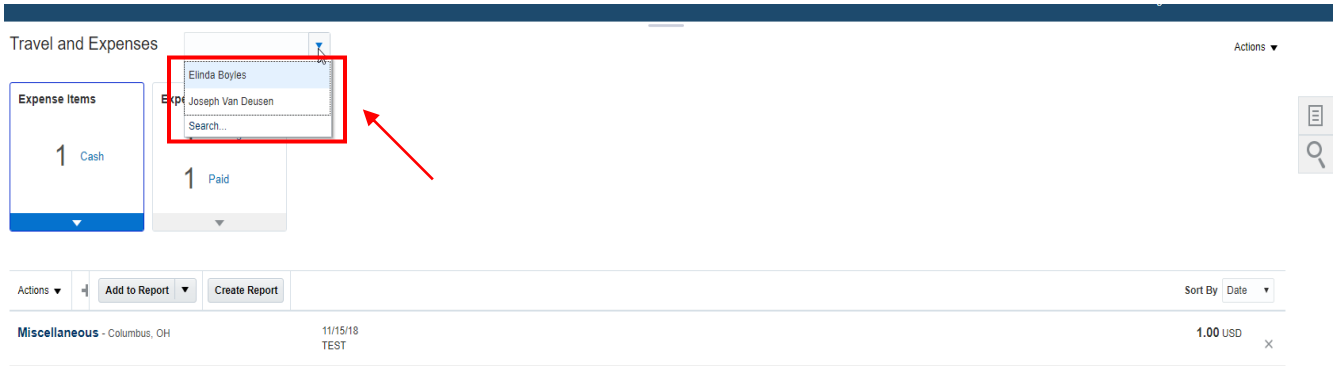
3. Once you are on the **Delegate and Permissions** page, you will select the **+** icon.



4. A new delegate line will show in the **Delegates and Permissions** box. Type the name of the Staff member you would like to Delegate an expense to. Then select their **@shawnee.edu** email.



5. Once the Delegate logs in to BearTrax, they will see a drop down arrow on their **Travel and Expenses** Page. The drop down box will show their name and anyone who has delegated expenses to them. The delegate will need to choose from the drop down list which expenses they are working on (their own or someone else's).



The screenshot shows the 'Travel and Expenses' interface. On the left, there are two panels: 'Expense Items' with '1 Cash' and 'EXP' with '1 Paid'. A dropdown menu is open, showing a list of staff members: 'Elinda Boyles', 'Joseph Van Deusen', and a 'Search...' field. A red box highlights the list, and a red arrow points to it. Below the panels, there are buttons for 'Add to Report' and 'Create Report'. At the bottom, a summary row shows 'Miscellaneous - Columbus, OH' with a date of '11/15/18', a note 'TEST', and an amount of '1.00 USD'.

Final Notes

By following these steps, you have successfully delegated expenses to the respective staff members.