



Quick Reference Guide



Topic : Assign a Delegate

Step-by-Step Instructions to assign personnel as an expense delegate

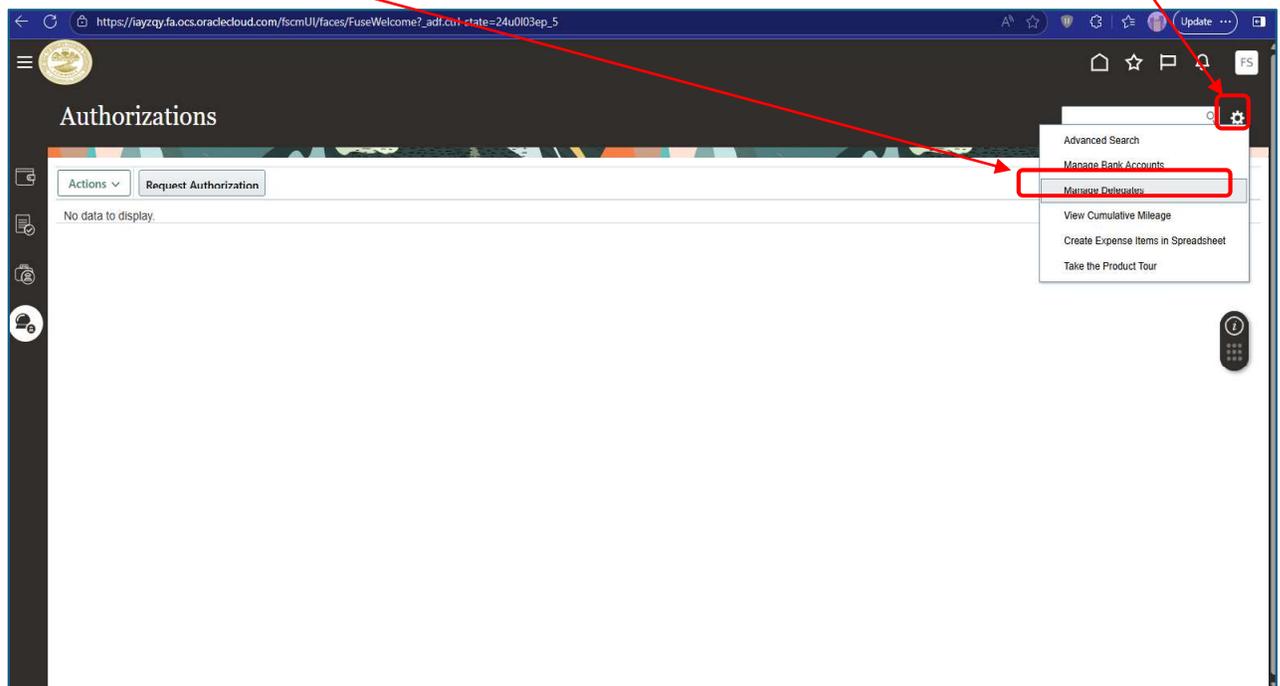
Introduction

This guide provides clear, step-by-step instructions on how to set up and manage a delegate to manage travel expenses on your behalf. Assigning a delegate streamlines the expense submission process, especially if you are frequently traveling or require administrative assistance.

A delegate is the authorized travel contact designated to create, edit, and submit travel expense reports on your behalf. Delegates have been identified by specific departments

Steps to Add an Expense Delegate

1. Log in to **One Connect**.
2. **From the landing (Home) page** – navigate to **Me > Expenses** and click on **Settings**.
3. Click on **Manage Delegates**

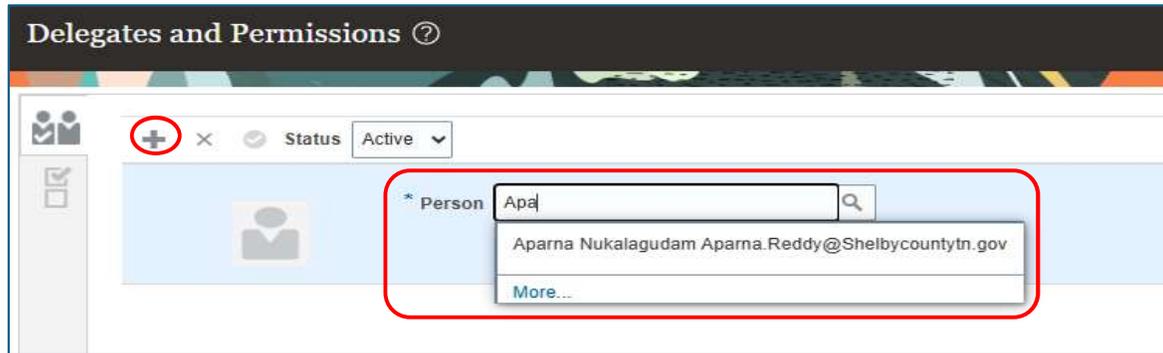




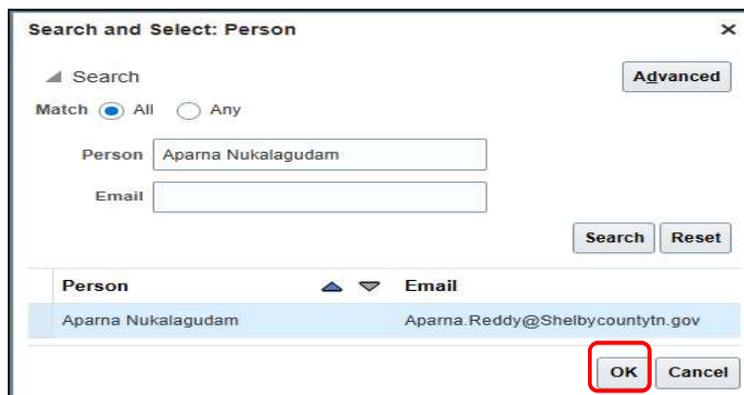
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4. On the **Delegate and Permissions** screen, click the “+” sign
5. A search box should appear. Here you will search for your delegate



6. In the search box, type the name of the designated delegate and click the hourglass
 - a. **Note:** a name may display as you begin type. If the name is correct you can hover over the name, and which will pull it into the search window
7. Highlight the name by clicking on the name and then click “OK”
 - a. The name will be highlighted



8. The Delegate name should display in the work area.
9. Click “Save and Close” this will save the delegate

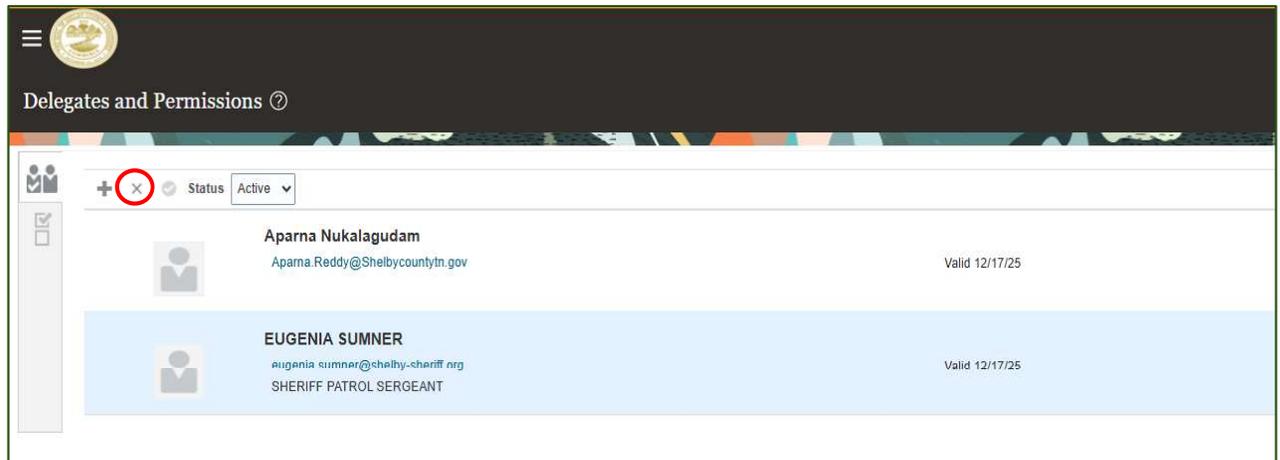


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How to Inactivate a Delegate for Travel Expenses

1. Navigate to Delegates and Permissions work area (steps 1 – 3)
2. Highlight by clicking on the Delegate to be inactivated



3. Click the “x” to inactivate the Delegate
4. The below warning should display



5. Click “Yes” then “Save and Close”
6. The **X** to inactivate becomes greyed out and the check mark  becomes available to reactivate if needed