Granting or Removing Delegate Access in MyExpense

This job aid explains how to:

- Add delegates to your MyExpense profile
- Assign the tasks a delegate may perform on your behalf
- Delete delegates from your profile

Logging in and Accessing Your Profile

Login to MyAccess (not shown). Scroll down to locate and select MyExpense from the applications menu. If you have set MyAccess to display “Favorites,” you may need to change to “All Apps” or search for MyExpense.

The MyExpense home page will display in a new tab.

1. Click the Profile drop-down menu in the upper right-hand corner of the MyExpense home page
2. Click the Profile Settings link; your profile options page displays
3. Click the Expense Delegates link
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Adding Delegates

1. Click the Add button on the Delegates tab to assign a new delegate.

2. In the Search field that displays, begin typing the employee’s First or Last Name, Email Address, or log-on ID, then select the correct name from the drop-down menus illustrated.

Setting Delegate Task Permissions

1. Select the tasks each delegate will be able to perform using the checkboxes. **Note:** for a delegate to be most effective, it is recommended you choose at least the options shown in green:

<table>
<thead>
<tr>
<th>Checkbox</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can Prepare</td>
<td>Delegate can prepare your Expense Report</td>
</tr>
<tr>
<td>Can View Receipts</td>
<td>Delegate can view your saved receipts</td>
</tr>
<tr>
<td>Can Submit Reports</td>
<td>Delegate can submit Expense Reports</td>
</tr>
<tr>
<td>Receives Emails</td>
<td>Delegate receives a copy of MyExpense emails</td>
</tr>
<tr>
<td>Receives Approval Emails</td>
<td>Delegate receives a copy of Approval emails</td>
</tr>
</tbody>
</table>

2. When you are finished selecting task permissions, click the Save button.

Repeat sections Adding Delegates and Selecting Delegate Task Permissions to add additional delegates, if desired.
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Deleting Delegates

1. To remove delegate(s) you no longer need on your profile, click the checkbox(es) next to the delegates you want to remove on the Expense Delegates screen.

2. Click the Delete button to remove the selected delegate(s).

3. Click OK on in the Message from webpage pop-up to confirm. The selected delegates will then be removed from your Profile.