Setting Up Your Profile in MyExpense

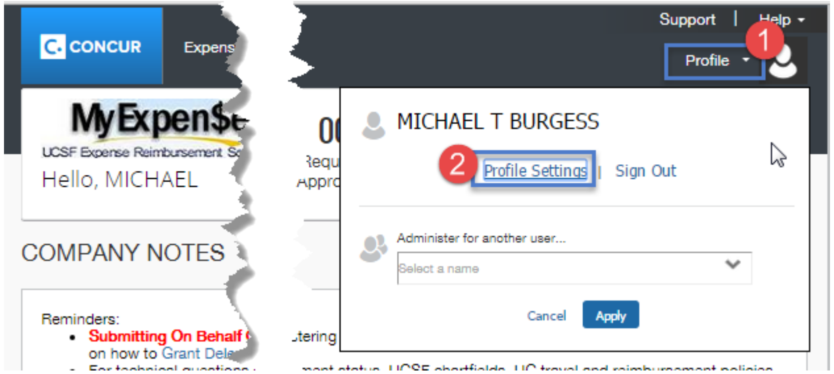
This job aid explains how to set up your user profile in **MyExpense** including:

- Edit your default **Expense Information**
- Add **delegates** to your profile
- Change your **Expense preferences**
- Change **Expense email preferences**

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

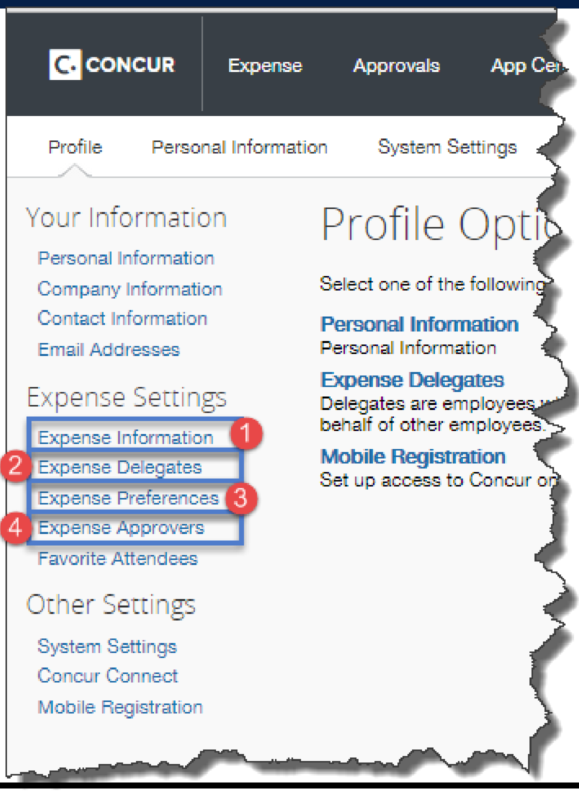


Choose the Expense Settings to Change

Choose the corresponding link for the **Expense Settings**, located in the left-hand column of your Profile page, you would like to change:

1. Select **Expense Information** to edit your default Dept ID (Cost Center), Business Unit, and/or SpeedType.
2. Select **Expense Delegates** to add/change delegates who will be able to enter Expense Reports on your behalf.
3. Select **Expense Preferences** to edit your Expense email preferences.
4. Select **Expense Approvers** to change your default Expense and/or Cash Advance Approvers.

After making your choice, follow the remaining steps in the corresponding section(s) of this job aid on pages 2-3.



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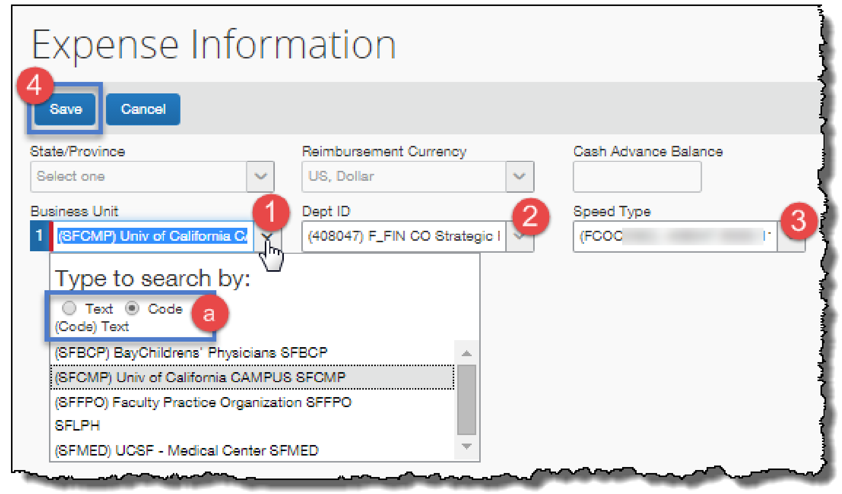
Expense Information

1. Click the **Business Unit** drop-down menu and select your preferred default Business Unit. The default value is SFCMP (UCSF Campus) unless you select otherwise.
2. Click the **Dept ID** drop-down menu and either scroll to find preferred default Dept ID (Cost Center) or begin typing to search. Once located using either method, click to select.
3. Valid SpeedTypes can be selected from the drop-down **after** selecting your Department ID (Cost Center). If you assign a default SpeedType to your profile in this step, **do not enter values** into Fund, Project, Activity Period, Function, or Flex Field when creating a new Expense Report using this value or you will receive an error message.
   - a. If you do not know the Code for any entry and wish to search using text, select the **Text** radio button before typing to search.
4. After you complete your default changes, click the **Save** button. Your defaults will be prepopulated on new Expense Reports. You can change any of these values prior to submitting the Expense Report.

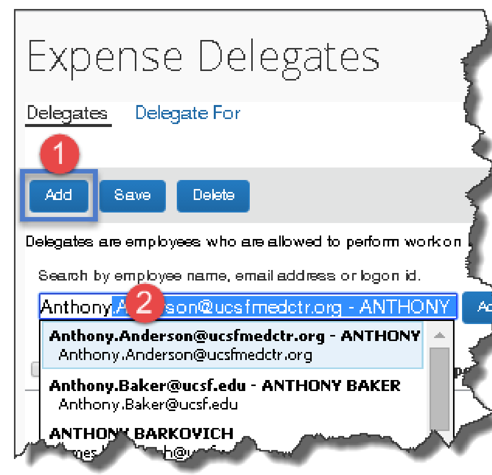


Expense Delegates

If you have not previously added delegates, “No records found” will display.
To add a new delegate:

1. Click the **Add** button. The **Search by employee name, email address, or logon id** field displays.
2. Begin typing the delegate’s name, email address, or logon id. Select the desired delegate from the list of results.
3. Check the corresponding box(es) to select setting(s) for the delegate:

Checkbox	Definition
Can Prepare	Delegate can prepare your Expense Report
Can View Receipts	Delegate can view your saved receipts
Can Submit Reports	Delegate can submit Expense Reports
Receives Emails	Delegate receives a copy of MyExpense emails
Receives Approval Emails	Delegate receives a copy of Approval emails



4. To remove a delegate, select the delegate’s row by checking the corresponding checkbox.
5. Click the **Delete** button.

   Repeat steps 1 through 3 to add/change as many additional delegates as required.
6. Click the **Save** button when you are finished adding or deleting your delegates.

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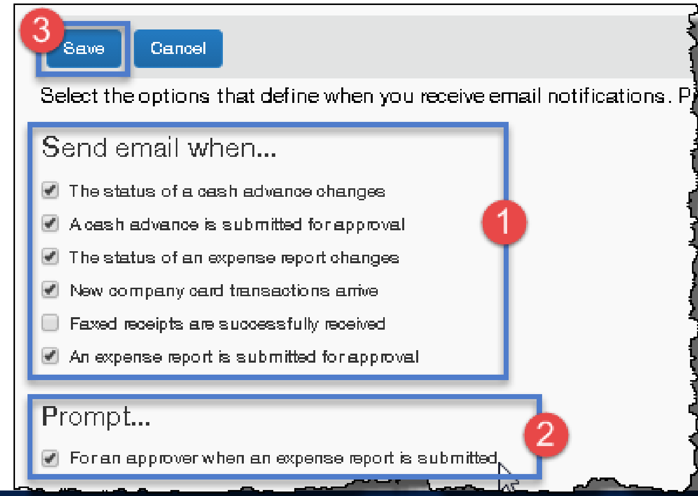
Expense Preferences (MyExpense Email Preferences)

1. Click the checkboxes to select the email messages you want to receive.
2. **Do not uncheck** the **prompt** for an approver checkbox. This will ensure that you will receive a message if an Approver is required when you submit your Expense Report.
3. Click the **Save** button to save your changes.



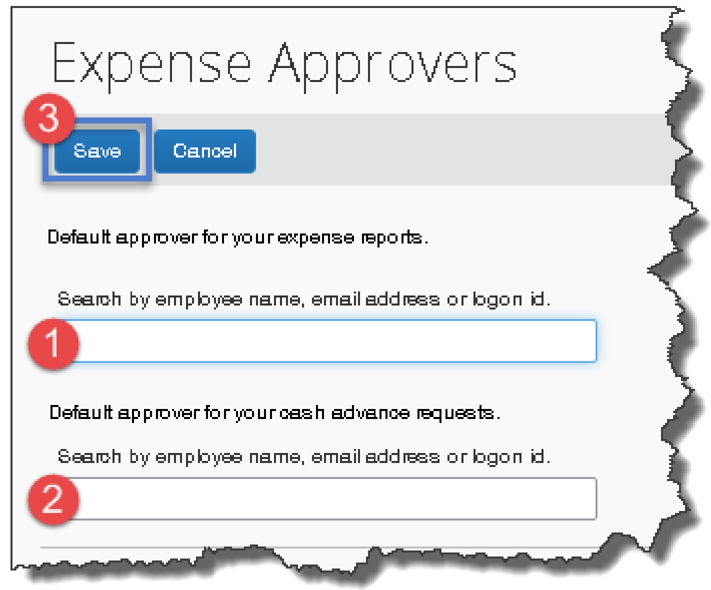
Expense Approvers

You can set your **default** Expense Report Approver and your **default** Cash Advance Approver on this page.

1. Click in this search box and begin typing your default Approver's name, email, or employee ID. Select from the valid values displayed.

   Hint: Your default Approver can be any employee including the Authorized Approver. If your default Approver and Authorized Approver are the same person, the Authorized Approver field is **not** required on the Expense Report. You will be prompted to enter a valid Authorized Approver, if required, when attempting to submit the report.
2. Click in this search box to search for, and choose, your Cash Advance Approver. The Cash Advance Approver **must be an Authorized Approver** in MyExpense.
3. Click the **Save** button to save your choices.

The chosen Approver(s) will be prepopulated on the future Expense Reports and/or Cash Advances you create. When you create a new Expense Report, you can change any Approver from the default to a different Approver if necessary.



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