

Add a Proxy

A person creating an Expense Report (ER) or Travel Plan (TP) can assign proxies to create ERs or TPs on their behalf. However, ER and TP document owners *must submit their own ERs and TPs*. The proxies *cannot* submit the ER or TP on behalf of another person. In addition to assigning a Creator Proxy, the reviewer and approver can assign proxies to review and approve ERs or TPs on their behalf.

Step One—Assign the Proxy

Step	Task
1.	Click the My Info tab.
2.	Click the Creator Proxy or Reviewer Proxy tab.
3.	Select an option from the Application menu.
4.	Click the Find User icon.
5.	Enter the first and last name of the user in the First Name and Last Name fields, or enter the user's netid in the Login field.
6.	Click the Search button.
7.	Click the Select link.
8.	Click the Add Proxy button.

Step Two—The Proxy Creates the ER or TP

Refer to *The Proxy* job aid.

Step Three—Document Owner Submits the ER or TP

Step	Task
1.	Locate the ER or TP to submit under the Inbox tab.
2.	Click the View/Edit Document icon.
3.	Review the Expense Report or Travel Plan details by clicking and reviewing information under the Overview, Summary, Items, Notes, Linked Documents, and Exceptions tabs.
4.	Click the Submit button.
5.	Click the Continue button.

Additional information:

- To assign a proxy, complete the steps one time for each proxy.
- The Creator Proxy creates a TP or ER on behalf of another person for pre-trip approval, employee travel and miscellaneous reimbursements, and non-purchase order payments to vendors.
- The Reviewer Proxy reviews and approves a TP or ER on behalf of another for pre-trip approval, employee travel and miscellaneous reimbursements, and non-purchase order payments to vendors.
- Refer to the *Create an Expense Report (ER)* job aid for more information.
- When adding a Reviewer Proxy, do *not* check the box for “Only when out of office”.