The Proxy Role Workflow

The Traveler, Manager, or Charge Code Reviewer must first give permissions to all people serving as their proxy in order to create and/or review and approve Expense Reports (ER) or Travel Plans (TP) on their behalf.

To create an ER or TP as a proxy, you must select the “Start Proxy” button in My Inbox and continue the process of creating an ER or TP. The last steps in the proxy role are to “End Proxy” and notify the traveler (e.g., Submitter) that the ER or TP is ready for their review, approval, and submission. The proxy cannot submit the ER or TP on behalf of another person.

To review and approve an ER or TP as a proxy, you must select the “Start Proxy” button in My Inbox and continue the process of reviewing and approving an ER or TP. The last step in the Proxy role is to “End Proxy”.

Creator Proxy

Start Proxy and Select Proxy User

*Create an ER or TP

*Select a Purpose

*Select Expense Type(s)

*Attach Receipts

End Proxy

Notify Submitter

Reviewer Proxy

Start Proxy and Select Proxy User

*Locate the ER or TP

*Open Document

*Review Details

*Approve, Reject, or Return for More Info

End Proxy

*For step-by-step instructions, refer to the Add a Proxy, Browse and Attach Receipts, Create an Expense Report (ER), and Review and Approve job aids.