

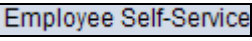





Setting Up an Entry Delegate

An entry delegate is an individual who you authorize to create and modify travel authorizations, cash advances, and expense reports for you, the traveler. You can set up one or more delegates on the **Authorize Users** page in PeopleSoft Financials. In this procedure, you will log on to PeopleSoft Financials and set up a delegate.

Step	Action
1.	Access PeopleSoft Financials at https://fsprd.umsystem.edu/psp/prd/ .
2.	<p>Log on to PeopleSoft Financials by entering your user ID and the password. (Use your Single Sign On (SSO) ID, which is the same one used to access your University email.) Note that both user ID and password are case sensitive.</p>  <p>Enter your user ID in the User ID field and press [Tab].</p>
3.	Enter your password into the Password field.
4.	Click the Sign In button. 
5.	<p>You have logged on to PeopleSoft Financials and are on the Home page.</p>  <p>The navigation Menu on the left side of the page displays a list of PeopleSoft Financials modules to which you have access. The links vary according to the logon credentials used to log on to the application.</p>
6.	To set up a delegate, begin by clicking the Employee Self-Service link. 
7.	Click the Travel and Expense Center link. 
8.	Click the Profiles and Preferences link. 
9.	Click the Delegate Entry Authority link. 

Quick Reference Guide

10. The **Authorize Users** page will display. Click the **Add a new row** (plus sign) button on the right side of the authorized user row. 



ORACLE

Home | Add to Favorites | Sign out

Menu

Search:

My Favorites

Employee Self-Service

Employee Profile

Travel and Expenses

User Preferences

- Create/Update User Template
- Delegate Entry Authority
- My Wallet
- Review Payments
- Review Expense History
- Review/Edit Profile
- Travel and Expense Center

Authorize Users

Timmy Traveler

Entering new UserIDs on this page will give those users the ability to enter expense transactions on behalf of the employee.

Name	Authorized User ID		
Traveler, Timmy	EPTRAVELER	+	-

Save

Note: Do not delete the row for your user ID by clicking the minus sign button.

11. In the new row, enter a partial or complete user name in the **Name** field.

12. Click the lookup feature (magnifying glass icon). 

13. Select the name from the search results.



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Authorize Users


Timmy Traveler

Entering new UserIDs on this page will give those users the ability to enter expense transactions on behalf of the employee.

Name	Authorized User ID		
Traveler, Timmy	EPTRAVELER	+	-
Brown, Mary Ann	BROWNMA	+	-

Save

Click the **Save** button. 

15. The **Save Confirmation** page will display. Click the **OK** button. 

Note: The delegate **does not** receive any notification from the system. You need to be sure you communicate the responsibilities to your delegate.

16. You have successfully set up a delegate.
End of Procedure.

17. Deleting a delegate

To delete a delegate, you click the **Delete row** (minus sign) button to the right of the row and click the **Save** button.

Note: Do not delete the row for your user ID.