Authorize a Proxy

Navigation: Employee Self-Service > Travel and Expenses > User Preferences > Delegate Entry Authority

1. On the Authorize Users page, click at the end of a row.
2. Enter the proxy’s Compass User ID in the Authorized User ID field.

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

<table>
<thead>
<tr>
<th>Authorized User ID</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>EM_EX1</td>
<td>Doe, John</td>
</tr>
<tr>
<td>EM_AF4</td>
<td></td>
</tr>
</tbody>
</table>
```

3. Click next to the proxy’s User ID.
4. Click the User ID link.

```
<table>
<thead>
<tr>
<th>Authorized User ID</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>EM_EX1</td>
<td>Doe, John</td>
</tr>
<tr>
<td>EM_AF4</td>
<td>Jones, Jane</td>
</tr>
</tbody>
</table>
```

5. Click Save.
6. Click OK.

Set Up a Guest Account (for Non-Employees or Students)

This topic is for University only. Healthcare does not use guest accounts.

Navigation: Employee Self-Service > Travel and Expenses > Profiles and Preferences > Guest/Student Profile

1. On the Employee Profile page, click Add.

```
<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

2. Enter the guest’s Name and Address information.
3. Click Save.

You are now a proxy for the guest and can enter Expense Reports on his or her behalf. After navigating to the Expense Report search page, select the Look Up button (magnifying glass) next to EmplID and select the guest from the list.
Set Up User Defaults

Navigation: Employee Self-Service > Travel and Expense Center > Expense Report > Create

1. On the Add a New Value tab, select your EmplID and click Add.
3. Set up the desired defaults. For example, you can set up
   a. A Default Creation Method
   b. A default Business Purpose
   c. A default Payment Type
   d. Multiple Expense Type defaults
4. Click Save.

Create User Templates

Navigation: Employee Self-Service > Travel and Expenses > User Preferences > Create/Update User Template

1. On the Add a New Value tab, input
   a. Document Template: a name for the template
   b. Template Type

2. Click Add.
3. On the Add a Template page, input
   a. Description
   b. Expense Type

4. To add additional Expense Types to the template
   a. Click Add.
   b. Enter the number of additional rows to add.
   c. Click OK.
5. Select an Expense Type for each additional row.
6. Click Save.
7. Click OK.