



Assign Creator and Reviewer/Approver Proxies

Expense Report and Travel Plan Creators can assign Proxies to create Expense Reports (ER) or Travel Plans (TP) on their behalf. Expense Report and Travel Plan Creators must *Submit their own Expense Reports/Travel Plans*; the Proxies cannot Submit the ER or TP on behalf of another. In addition to assigning a Creator, the reviewer/approver can assign Proxies to Review/Approve Expense Reports or Travel Plans on their behalf.

Step One – Assign the Proxy

Step	Task
1.	Select the My Info link
2.	Choose the Creator Proxy or Reviewer Proxy tab
3.	Click the drop-down; select an Application → Expense Report
4.	Click the Find User icon
5.	Enter First Name and Last Name → Patricia Koestner or id: pkoest 2
6.	Click the Search command button
7.	Click the Select link
8.	Click the Add Proxy command button

Step Two – The Expense Report or Travel Plan is created by the Proxy – refer to *The Proxy* job aid

Step Three – Submit Expense Report/Travel Plan – The Traveler or Creator

Step	Task
1.	Login to TEM with Enterprise ID and Password
1.	Select the My Documents tab
2.	Locate the Expense Report to Submit
3.	Click the View/Edit Document icon
4.	Review the Expense Report details: <ul style="list-style-type: none"> • Overview Tab (e.g., <i>View/Edit Header, Status Details, Financial Details</i>) • Items Tab (e.g., <i>Add Note, Delete Item, Copy Item, View/Edit Item</i>)
5.	Click the Submit link
6.	Click the Continue command button

Additional information:

- *Assign the Proxy* – complete the steps one time; for each Proxy
- *Creator Proxy* creates a TP or ER on behalf of another for pre-trip approval, employee travel and miscellaneous reimbursements, and non-purchase order payments to vendors.
- *Reviewer Proxy* reviews/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.