Delegate your expense approval authority

Within the iExpenses module of UWinsite Finance, expense approval authority can be delegated on a temporary (i.e. for a vacation) or permanent basis.

Before delegating this authority, however, it is important to understand the implications of the decision and the factors that must be considered.

Establishing an expense approval rule provides your delegate with the authority to approve expense reports on *your behalf*. The responsibility for the approvals still resides with you because they will be charged to your account(s).

In addition, your delegate needs to be aware of the University's expense-related policies and the implications of their approval decisions. As such, your delegate should be carefully selected to ensure s/he has the financial knowledge as well as understanding of the repercussions of their decisions.

To delegate your expense approval authority:

1. Log into UWinsite Finance at uwindsor.ca/uwinsitefinance using your UWin ID and Password.
2. Click the **Notification Bell icon** in the top menu bar.
3. Select **More Details** > **Financials**.
4. The **BPM Worklist** window is displayed.
5. Click on **your name** in the upper right corner and select **Preferences**.
6. Select **My Rules**. (Either the button in the top right OR the text link in the left menu work.
7. Select checkbox beside **Enable Vacation Period**.
8. Choose the **Start Date** and **End Date**.
9. Select the radio button beside **Delegate to**.
10. Click the **Search** icon.
11. Enter the First Name and Last Name OR UWin ID of the person to whom you want to delegate your approval authority. Click the **Search** button.
12. Select the radio button next to the name of the person to whom you want to delegate your approval authority. Click the **OK** button.
13. Click **Save** to apply the new rule.
14. Click on **your name** and select **Logout.**

Create a first-level reviewer

The approval routing for all expense reports will be first to the "one up" then to the "departmental authority" for operating accounts or "project authority" for grant/project accounts. The online expense form includes built-in mechanisms to ensure the forms are completed correctly.

We believe that UWinsite Finance users will discover that a 'first-level review' by an Assistant or Secretary will not be required as the system is doing many of the completeness checks previously performed by staff. We understand, however, that some leaders may still wish to have a first-level review conducted. The steps to create a first-level reviewer are outlined below.

Note:
While creating a first-level reviewer is possible, **it is not recommended**.

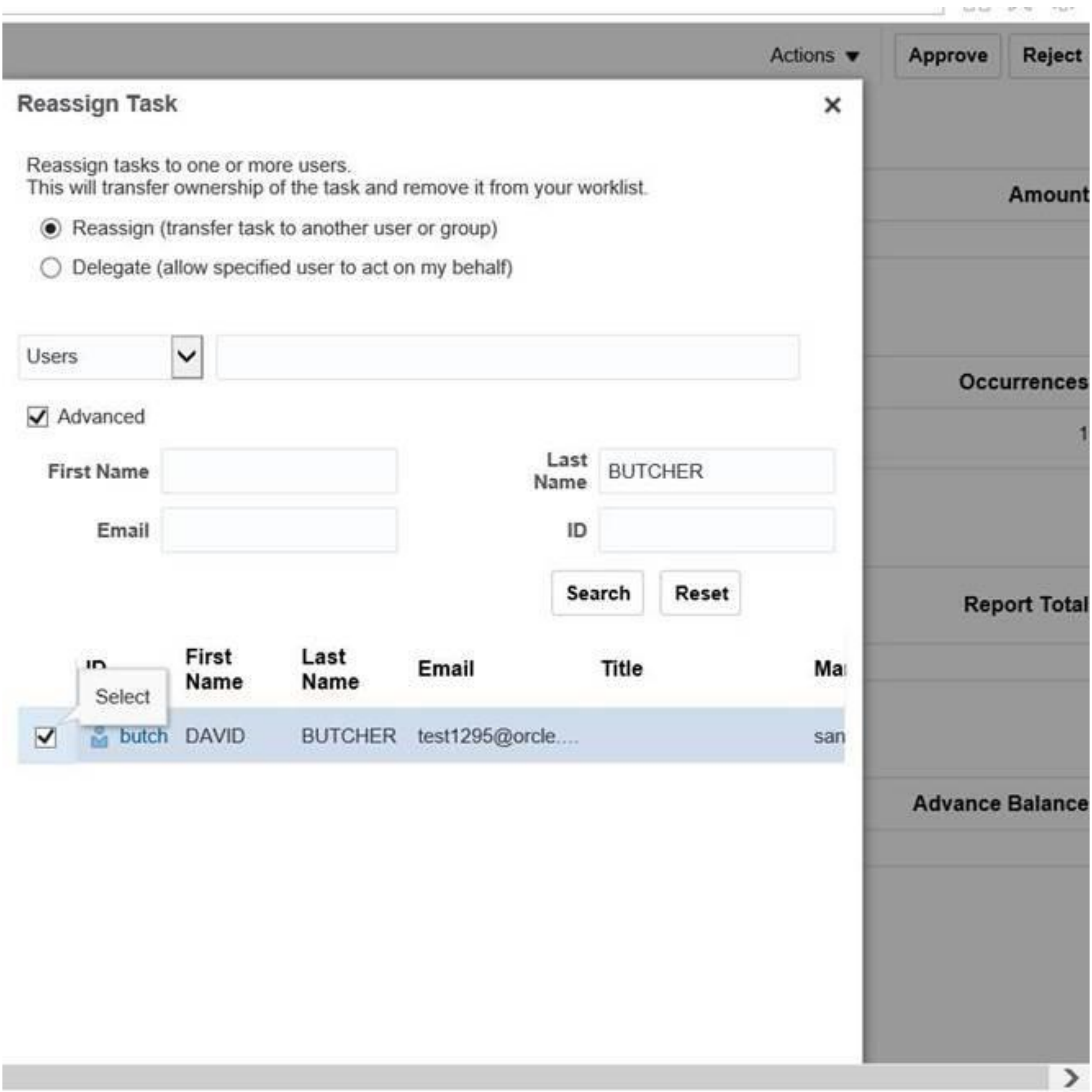
Once a first-level reviewer has been created in UWinsite Finance, s/he will have the access to approve expenses without a second-level review by the leader as there are no built-in mechanisms to enforce the second-level review or to prevent the first-level reviewer from approving the report.

Steps for Leaders:

1. Refer to the "Delegate your expense approval authority" handout to delegate authority to your reviewer
2. Wait for your reviewer to review and reassign the report to you
3. Log into UWinsite Finance (uwindsor.ca/uwinsitefinance)
4. Click the **Menu** icon in the top left corner
5. Under the **Expenses** category, click the **About Me** link
6. The **Travel and Expenses** page is displayed, listing the reports your reviewer has re-assigned to you
7. Review your reviewer's comments
8. Click the **Approve** button when ready

Steps for Reviewers:

1. Wait for your leader to delegate expense approval authority to you
2. Log into UWinsite Finance (uwindsor.ca/uwinsitefinance)
3. Review the expense reports delegated to you by your leader
4. In the **Comment** field, indicate you have reviewed the report
5. Click **Action** > **Reassign Task**
6. The **Reassign Task** window opens
7. Use the **First Name** and **Last Name** fields to search for your leader (see: screenshot on the page)
8. Select the box beside your leader's name
9. Click the **Okay** button


Actions
Approve
Reject
Reassign Task
Reassign tasks to one or more users.
This will transfer ownership of the task and remove it from your worklist.
Reassign (transfer task to another user or group)
Delegate (allow specified user to act on my behalf)
Users
Advanced
First Name
Last Name
BUTCHER
Email
ID
Search
Reset
First Name
Last Name
Email
Title
Select
butch
DAVID
BUTCHER
test1295@orcle....
san
Amount
Occurrences
1
Report Total
Advance Balance